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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

		the Treasury	Note.	The foundation may be able to	to use a copy of this return	to satisfy sta	te reporting r	equirements		
		r year 2009, or	·		nd ending					
G Ch	eck all	I that apply	Initial retu	rn Initial ret	urn of a former public of	harity		Final return		
			Amended	return Addr	ess change	Name	change			
Use t	he IRS	Name of found	dation				A Emplo	yer identification num	nber	
	bel.		BERT AN	D ANGELA ORTE	NZIO		25-6843186			
Othe	rwise,	FAMILY	FOUNDA'	rion			B Telephone number (see page 10 of the instruction			
pı	int	Number and s	street (or P O box	number if mail is not delivered	I to street address) F	Room/suite	717	-972-1305		
or t	ype.	4718 0	SETTYSBU	RG ROAD - SUI	TE 4	05	C If exen	nption application is pend	ding, check here	
See S	•	Oity or tomin	state, and ZIP code	•			D 1. For	eign organizations, chec	k here	
Instru	ctions	MECHAN	NICSBURG	PA	<u> 17055 </u>		2. For	eign organizations meet	ing the	
H C	eck ty	pe of organizati	on X Section	501(c)(3) exempt private	foundation		859	% test, check here and a	ttach computation 🕨 📗	
∏ s	ection	4947(a)(1) none	exempt charitable	e trust Other taxabl	e private foundation		E If private foundation status was terminated under			
I Fa	r mark	et value of all a	ssets at end	J Accounting method	X Cash Accr	ual	section	n 507(b)(1)(A), check he	re 🕨 📘	
of y	ear (fr	rom Part II, col	(c),	Other (specify)			F If the f	oundation is in a 60-mor	nth termination	
line	16) 🕨	s 4,	754,198	(Part I, column (d) must	be on cash basis)		under	section 507(b)(1)(B), chi	eck here	
Pa	rt I	Analysis of	f Revenue ai	nd Expenses (The	(a) Revenue and	42.44			(d) Disbursements	
				may not necessarily equal	expenses per books	(b) Net in	vestment ome	(c) Adjusted net income	for charitable purposes	
		the amounts in colur	nn (a) (see page 11 of	the instructions))			J5		(cash basis only)	
	1	Contributions, gifts	s, grants, etc, rece	eived (attach schedule)	300,000					
	2	Check ▶ If	the foundation is t	not required to attach Sch B						
	3	Interest on savi	ngs and tempor	ary cash investments						
<u></u>	4	Dividends and i	interest from sec	curities	132,158	1	30,807			
	5a	Gross rents								
چ چ	b	Net rental incor	me or (loss)							
AUN GENNWEDS Revenue	6a	Net gain or (loss) from	n sale of assets not on	line 10	-79,191					
	b	Gross sales price for	all assets on line 6a	<u>2,921,615</u>						
ฐ"	7	Capital gain ne	t income (from f	Part IV, line 2)			0			
₹	8	Net short-term	capital gain					()	
.9	9	Income modific	cations	1						
19	10a	Gross sales less	returns & allowand	es						
2	b	Less Cost of g	oods sold							
20.8 m .	С	Gross profit or	(loss) (attach so							
-,	11		attach schedule) STMT 1	-4,176		-4,648			
	12	Total. Add line	·		348,791]	26,159		<u> </u>	
S	13	•	*	ctors, trustees, etc			<u> </u>			
ıses	14		e salaries and v			ļ				
)ei	15 r		employee bene	efits						
X	16a	Lega (Res (a)	_ , ,	OTTAME O	4 000		1 407		0.053	
<u>و</u>	l P	Accounting fee	s (attach sched	ole) STMT 2	4,280		1,427		2,853	
Ę	C	Other profession	al fees (attach sch	edule)		ļ				
it		Minterest -	2010) cmwm >	1 210		210			
- <u>E</u>	18			einstructions) STMT 3	1,318	<u> </u>	318			
Έ	19	Debu éciation (3)	advschedute) and	appletion						
Ad	20	Occupancy								
Ď	21		ences, and mee	ungs		-				
Operating and Administrative Expen	22	Printing and pr		STMT 4	25,445		25,421	-	15	
ng	23	Other expenses (att			23,445	<u>'</u>	42,441		 	
ati	24	=	_	rative expenses.	31,043		27,166	.]	2 960	
Эeг	1 25	Add lines 13 th	-	d	950, 202		21,100		2,868 950,202	
Ö	25		gifts, grants pai	o ents. Add lines 24 and 25	981,245		27,166		0 953,070	
	26			ents. Aud lines 24 and 20	301,24	' 	21,100		933,070	
	27	Subtract line 2		es and disbursements	-632,454	1				
	a		•	gative, enter -0-)	032,435		98,993			
	b		income (if nega	-		1	JU, JJ		0	
	_ և_	Aujusteu net	moonie (ii jiega					1	<u>~1</u>	

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

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Form **990-PF** (2009)

Fo	rm 990	D-PF (2009) THE ROBERT AND ANGELA ORTENZIO	25-684318	6		Page 2
	art I	Attached schedules and amounts in the description column	Beginning of year	Enc	d of	year
	a1 ()	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value		(c) Fair Market Value
	1	Cash—non-interest-bearing	3,815	3,95	0	3,950
	2	Savings and temporary cash investments	406,349	112,05	6	112,056
- 1	3	Accounts receivable ▶			Т	
-		Less allowance for doubtful accounts ▶	[
- 1	4	Pledges receivable ▶				
		Less allowance for doubtful accounts ▶	1		- [
	5	Grants receivable			T	
ı	6	Receivables due from officers, directors, trustees, and other		. –	T	
	•	disqualified persons (attach schedule) (see page 16 of the			ı	
		instructions)				
- 1	7	Other notes and loans receivable (att. schedule)			_	
	•	Less allowance for doubtful accounts ▶	1		1	
S	8	Inventories for sale or use			寸	
Assets	9	Prepaid expenses and deferred charges			寸	
Š	10a	Investments—U.S. and state government obligations (attach schedule) STMT 5	1,072,014	538,77	7.8	548,977
_	b	Investments—corporate stock (attach schedule) SEE STMT 6	544,072	473,20	\rightarrow	2,620,089
1		Investments—corporate bonds (attach schedule) SEE STMT 7	550,875	1,064,49		1,139,988
ŀ	с 11	Investments—land, buildings, and equipment basis	330,013	1/001/1		171337300
		Less accumulated depreciation (attach sch.)			İ	
	12	Investments—mortgage loans			\neg	
ŀ	13	Investments—other (attach schedule) SEE STATEMENT 8	589,747	341,93	36	329,138
	14	Land, buildings, and equipment basis	303,747	341,30	-	323,130
	14	Less accumulated depreciation (attach sch)	1		ŀ	
	15					
	16	Other assets (describe ►) Total assets (to be completed by all filers—see the				
	10	instructions. Also, see page 1, item I)	3,166,872	2,534,43	1 8	4,754,198
\dashv	17	Accounts payable and accrued expenses	3,100,072	2/331/11	- 🌂	4//54/150
	18	Grants payable			\dashv	
es	19	Deferred revenue			\neg	
Ξ	20	Loans from officers, directors, trustees, and other disqualified persons			-	
Liabilities	21	Mortgages and other notes payable (attach schedule)				i
Ë	22				\neg	
	23	Other liabilities (describe ►) Total liabilities (add lines 17 through 22)	0		0	
_	23	Foundations that follow SFAS 117, check here			\dashv	:
S		and complete lines 24 through 26 and lines 30 and 31.				
ခွ	24	Unrestricted				
au	25	Temporarily restricted		- · · · · · · · · · · · · · · · · · · ·		
Ba	26	Permanently restricted	-			
Þ		Foundations that do not follow SFAS 117, check here				
Ë		and complete lines 27 through 31.	1			
Net Assets or Fund Balances	27	Capital stock, trust principal, or current funds	3,166,872	2,534,4	18	
o s	28	Paid-in or capital surplus, or land, bldg , and equipment fund	- 3/200/012	2,001,1		
ė	29	Retained earnings, accumulated income, endowment, or other funds				•
SS	30	Total net assets or fund balances (see page 17 of the				
it A	"	instructions)	3,166,872	2,534,4	18	
ž	31	Total liabilities and net assets/fund balances (see page 17				
	"	of the instructions)	3,166,872	2,534,4	18	
-	Part			-, , , , , , , , , , , , , , , , , , , 		·
٠.	~~~~	al net assets or fund balances at beginning of year—Part II, column (a), line 30 (m	ust agree with			
		-of-year figure reported on prior year's return)	-9		1	3,166,872
•		er amount from Part I, line 27a		 -	<u>.</u> 2	-632,454
		er increases not included in line 2 (itemize)		F-	- 3	32=, 301
		I lines 1, 2, and 3		<u> </u>	4	2,534,418
		creases not included in line 2 (itemize)			 5	, ,
		al net assets or fund balances at end of year (line 4 minus line 5)—Part II, column	(b), line 30		6	2,534,418
_		the state of the s				200 DE

	T AND ANGELA ORTENZ.		<u> </u>		Page 3
	Losses for Tax on Investment	income	(b) How acquired	(n) Dolo cos	urad (d) Data and
•(a) List and describe the 2-story brick warehous	e kind(s) of property sold (e g , real estate, se, or common stock, 200 shs MLC Co)		P—Purchase D—Donation	(c) Date acqu (mo , day, y	
1a SEE·WORKSHEET					
b					
С					
<u>d</u>					
<u>e </u>	(f) Depreciation allowed	(g) Cost of	r other basis	(h	i) Gain or (loss)
(e) Gross sales pпсе	(or allowable)		ense of sale	(e)	plus (f) minus (g)
a					
<u>b</u>		· · · · · · · · · · · · · · · · · · ·			···
d					
e					
Complete only for assets showing ga	ain in column (h) and owned by the found	dation on 12/31/	69	(I) Gain	s (Col (h) gain minus
(I) F M ∨ as of 12/31/69	(j) Adjusted basis as of 12/31/69	• •	ss of col (i) I (j), if any		out not less than -0-) or ses (from col (h))
a					
b c					
d					
е					
2 Capital gain net income or (net capit	al loss) If gain, also enter in Pai			2	-79,191
3 Net short-term capital gain or (loss)		it i, iiile /			10,101
	lumn (c) (see pages 13 and 17 of the ins	structions)			
If (loss), enter -0- in Part I, line 8				3	- 79,191
	er Section 4940(e) for Reduced undations subject to the section 4940(a)			me	
If "Yes," the foundation does not qualify	4942 tax on the distributable amount of under section 4940(e) Do not complete	this part			
	th column for each year, see page 18 of	the instructions	before making any er	itries	(4)
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions		(c) e of noncharitable-use as:	10	(d) Distribution ratio of (b) divided by col (c))
2008	709,1		3,930,		0.180394
2007 2006	532,5 224,8		4,533, 4,090,		0.117470 0.054970
2005	160,2		3,706,		0.043221
2004	25,1	115	2,003,		0.012533
2 Total of line 1, column (d)				2	0.408588
	ear base period—divide the total on line been in existence if less than 5 years	2 by 5, or by th	e	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 F	art XII, line 4 ne 7, check the box in Part VI, line 1b, a	and complete the	at nart using a 1% tov	rate. See the	953,070
Dad Muset vietes on page 19	no r, oneon the box in rait vi, line 10, a	and complete the	at part using a 170 tax	iate occure	

orm	990-PF (2009) THE ROBERT AND ANGELA ORTENZIO 25-6843186				Pa	ge 4
Pa	rt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the in	nstru	ctions)			
1a	Exempt operating foundations described in section 4940(d)(2), check here 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	1			9	<u>90</u>
	here ► X and enter 1% of Part I, line 27b					
С	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of					
	Part I, line 12, col (b)	1				
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				90
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			<u> </u>	990
6	Credits/Payments					
а	2009 estimated tax payments and 2008 overpayment credited to 2009 6a 1, 108					
b	Exempt foreign organizations—tax withheld at source 6b					
С	Tax paid with application for extension of time to file (Form 8868) 6c 500					
d	Backup withholding erroneously withheld 6d 6d	-				
7	Total credits and payments Add lines 6a through 6d	7			1,6	<u>808</u>
8	Enter any penalty for underpayment of estimated tax. Check here X 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			(518
11	Enter the amount of line 10 to be Credited to 2010 estimated tax ▶ 618 Refunded ▶	11	-			
Pa	rt VII-A Statements Regarding Activities					
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it				Yes	No
	participate or intervene in any political campaign?		Ī	1a		X
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)?			1b	1	X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials					
	published or distributed by the foundation in connection with the activities					
С	Did the foundation file Form 1120-POL for this year?		-	1c		Χ
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 ▶ \$					i
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed					
	on foundation managers > \$					ł
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?			2		Χ
	If "Yes," attach a detailed description of the activities					
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of					İ
	incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes			3		<u>X</u>
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?			4a		X
b	If "Yes," has it filed a tax return on Form 990-T for this year?		N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?			5		Χ
	If "Yes," attach the statement required by General Instruction T					\Box
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either					ĺ
	By language in the governing instrument, or					
	By state legislation that effectively amends the governing instrument so that no mandatory directions that					ĺ
	conflict with the state law remain in the governing instrument?			6	Χ	
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 Par	t XV		7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the					
	instructions) > PA					
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General					
~	(or designate) of each state as required by General Instruction G? If "No," attach explanation			8b	Χ	[
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			9		Х
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their			بّ ا		 -
	names and addresses			10		X
	110000000000000000000000000000000000000		Fo		0-PF	(2009)

	990-PF(2009) THE ROBERT AND ANGELA ORTENZIO 25-684318	6			Pa	age 5
	urt 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				J	
	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	.	Χ
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption applic	ation?		13	Х	
	Website address ► N/A					
14	The books are in care of ▶ ROBERT L. NAUSE Telep	ohone no 🕨	717-9	72-	130	5
	4718 GETTYSBURG RD					
	Located at ► MECHANICSBURG, PA	ZIP+4 ▶	17055	ı		
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			
Pa	irt 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?	Yes	X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a		_			
	disqualified person?	Yes	X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	X Yes	No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes	X No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for		_			
	the benefit or use of a disqualified person)?	Yes	X No		1	
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the					
	foundation agreed to make a grant to or to employ the official for a period after					
	termination of government service, if terminating within 90 days)	Yes	X No			
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regular	ions				
	section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?			1b		X
	Organizations relying on a current notice regarding disaster assistance check here		▶ ∐			
С	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	1c		
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))					
а	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and		C - 1			
	6e, Part XIII) for tax year(s) beginning before 2009?	Yes	X No			
	If "Yes," list the years ▶ 20 , 20 , 20 , 20					
D	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		27 / 7			
С	all years listed, answer "No" and attach statement—see page 20 of the instructions) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		N/A	2b		
·	► 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?	Yes	X No			
b	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or		23 .10			
	disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the					
	Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of					
	the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the					
	foundation had excess business holdings in 2009)		N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose	ıs?	/	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize it			,u		
	charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2			4b		Х
						

<u>orm</u>		AND ANGELA ORTENZI		843186			Page 6
Pa	rt VII-B Statements Regar	ding Activities for Which For	m 4720 May Be Re	equired (conti	nued)	, , , , ,	
5a	During the year did the foundation pay	-					
	(1) Carry on propaganda, or otherwise	e attempt to influence legislation (section	on 4945(e))?	Y€	es X No		
	(2) Influence the outcome of any spec	cific public election (see section 4955),	or to carry on,				
	directly or indirectly, any voter reg	istration drive?		∐ Ye			
	(3) Provide a grant to an individual fo	r travel, study, or other similar purpose	s?	<u> </u>	∍s ⊠ No		
		other than a charitable, etc., organizat					
	section 509(a)(1), (2), or (3), or se	ection 4940(d)(2)? (see page 22 of the	instructions)	∐ Ye	es 🗓 No		
	(5) Provide for any purpose other tha	n religious, charitable, scientific, literar	y, or educational				
	purposes, or for the prevention of	cruelty to children or animals?		∐ Y	es 🗓 No		
b	If any answer is "Yes" to 5a(1)-(5), did	l any of the transactions fail to qualify ι	inder the exceptions de	scribed in			
	Regulations section 53 4945 or in a ci	ırrent notice regarding disaster assista	nce (see page 22 of the	e instructions)?	_N/A	5b	
	Organizations relying on a current not	ice regarding disaster assistance chec	k here		▶ 📙		
¢	If the answer is "Yes" to question 5a(4)	i), does the foundation claim exemptio	n from the tax				
	because it maintained expenditure res	sponsibility for the grant?		N/A 📙 Y	es 📙 No		
	If "Yes," attach the statement required	d by Regulations section 53 4945-5(d)					
6a	Did the foundation, during the year, re	eceive any funds, directly or indirectly, t	o pay premiums	_			
	on a personal benefit contract?			∐ Y	es 🛚 No		
b	Did the foundation, during the year, p	ay premiums, directly or indirectly, on a	personal benefit contra	act?		6b	X_
	If "Yes" to 6b, file Form 8870			_			
		he foundation a party to a prohibited ta			es 🛚 No		
		proceeds or have any net income attrib			N/A	7b	
Pa		Officers, Directors, Trustees,	Foundation Mana	agers, Highly	Paid Employe	es,	
	and Contractors						
<u>1 L</u>	ist all officers, directors, trustees, fo	undation managers and their compe	nsation (see page 22 d	of the instruction			
	(a) Name a	nd 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		nse account, allowances
RC	BERT A. ORTENZIO	CAMP HILL	TRUSTEE			-	
	16 OLMSTEAD WAY E.	PA 17011	5.00	ol	0	ļ	0
	GELA D. ORTENZIO	CAMP HILL	TRUSTEE				
	16 OLMSTEAD WAY E.	PA 17011	5.00	o	0		0
2	Compensation of five highest-paid If none, enter "NONE."	employees (other than those include	d on line 1—see page	23 of the instruct	tions).		
	(a) Name and address of each e	mployee 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		ense account, allowances
NO	DNE						
						-	
						ļ	
Tota	I number of other employees paid ove	r \$50,000				•	1

Form 990-PF (2009) THE ROBERT AND ANGELA ORTENZ	IO 25-6843186	Page 7
Part VIII Information About Officers, Directors, Trustees	s, Foundation Managers, Highly Paid Empl	oyees,
and Contractors (continued)		
3 Five highest-paid independent contractors for professional services (s		
(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		<u> </u>
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relev	vant statistical information such as the number of	Evponess
organizations and other beneficiaries served, conferences convened, research papers proc	Juced, etc	Expenses
1 N/A		
2		
3		
4		
Part IX-B Summary of Program-Related Investments (s	see page 24 of the instructions)	_1
Describe the two largest program-related investments made by the foundation during the ta		Amount
1 N/A		
<u></u>		
2		
All other program-related investments See page 24 of the instructions		
3		

Total. Add lines 1 through 3

qualifies for the section 4940(e) reduction of tax in those years

Pa	rt X Minimum Investment Return (All domestic foundations must complete this part Fore	eign f	oundations,
	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		
а	Average monthly fair market value of securities	1a	3,138,217
b	Average of monthly cash balances	1b	260,286
С	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
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	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
Pa	Irt XI Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private of	perati	ng
	foundations and certain foreign organizations check here		
1	Minimum investment return from Part X, line 6	1	167,376
2a	Tax on investment income for 2009 from Part VI, line 5		
b	Income tax for 2009 (This does not include the tax from Part VI)]	
С	Add lines 2a and 2b	2c	990
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	990 166,386
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
			<u> </u>
	art XII Qualifying Distributions (see page 25 of the instructions)		,
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
а	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.,	1	
	purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
а	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 found	ation	

Form **990-PF** (2009)

Distributable amount for 2009 from Parl XI, Corpus Years prot to 2008 2009	Pa	rt XIII Undistributed Income	(see page 26 of tl	ne instructions)			
166,386 166		•			(b)	(c)	(d)
Inter 1	1	Distributable amount for 2009 from Part X	l,	Corpus	Years prior to 2008	2008	2009
a Eater amount for 2008 only b Total for prony years 20							166,386
a Eater amount for 2008 only b Total for prony years 20	2	Undistributed income, if any, as of the end	l of 2009				· · · · · · · · · · · · · · · · · · ·
3 Excess distributions carryover, if any, to 2009 From 2006 From 2006 From 2007 From 2008 Total of lines 3a through a 4 Qualitying distributions for 2009 from Part XII, line 4 + 5							
3 Excess distributions carryover, if any, to 2009 From 2006 From 2006 From 2007 From 2008 Total of lines 3a through a 4 Qualitying distributions for 2009 from Part XII, line 4 + 5	b	Total for prior years 20 , 20	, 20				
a From 2005 From 2006 From 2007 From 2008							
From 2006 From 2007 291,270 514,789 806,059	а	1					
From 2007 291, 270	b	From 2005					
From 2008	С	From 2006					
f Total of lines 3a through e Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 953,070 a Appled to 2009, but not more than line 2a Appled to undistribution more of pror years (Election required—see page 26 of the instructions) Treated as distributions out of corpus (Election required—see page 26 of the instructions) d Applied to 2009 distributiable amount Remaining amount distribution out of corpus Excess distributions carryover applied to 2009 (If an amount appears in collumn (a), the same amount must be shown in column (a)) Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 5 D Prior years' undistributed momes Subtract line 4b from line 2b D Prior years' undistributed momes Subtract line 4b from line 2b Lata has been previously assessed d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions Add and 5 from line 1 This amount must be distributed in 2010 A Amounts treated as distributions out of corpus to stasky requirements imposed by section 170(pt)(Y)(F) or 4942(g)(3) (see page 27 of the instructions) B Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2007 Excess from 2006 Excess from 2007 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2006	d	From 2007	291,270				
4. Qualfying distributions for 2009 from Part XII, line 4 ► \$ 953, 070 A Applied to 2008, but not more than line 2a A Applied to 2008, but not more than line 2a A polipide do undistributed income of princy 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 stributibled amount Remaining amount distributed out of corpus Excess distributions carryver applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a)) Enter the net total of each column as indicated below: a Corpus Add fines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed mome Subtract line 4b from line 2b C Enter the mount 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 4 from line 2 Taxable amount—see page 27 of the instructions 1 Undistributed income for 2009 Subtract line 4 from line 2 Taxable amount—see page 27 of the instructions 1 Undistributed income for 2009 Subtract line 4 from line 1 This amount must be distributed income for 2009 Subtract line 4 from line 1 This amount must be distributed income for 2009 Subtract lines 4 did and 5 from line 1 This amount must be distribution scernyover from 2004 not applied on the 5 or line 7 (see page 27 of the instructions) Excess distributions carryover from 2004 not applied on the 5 or line 7 (see page 27 of the instructions) Excess distributions carryover from 2004 not applied on the 5 or line 7 (see page 27 of the instructions) Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2007 Excess from 2008	е	From 2008	514,789				
In e4 ▶ \$ 353,070 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 4 Applied to 2009 distributable amount Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2009 (if an amount appears in column (a)) 6 Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e. Subtract line 5 b Prior year's undistributed income Subtract line 4b from line 2b c Enter the amount of prory years' undistributed income for which a notice of deficiency has been insued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b. Texable 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 6 from line 11 has amount must be distributed in 2010 A Amounts treated as distributions out of corpus to stasty requirements imposed by section 1700(11)(F) or 4942(a)(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) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (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) 8 Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2008 Excess from 2008 Excess from 2008 Excess from 2008	f	Total of lines 3a through e		806,059			
a Applied to 2008, but not more than line 2a b Applied to undistributed income of pnor 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 e Remaining amount distributed out of corpus 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 betow: 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 esction 494(2i) tax has been previously assessed d Subtract line 6 from line 6b Taxable amount—see page 27 of the instructions d Undistributed income for 2008 Subtract line 4 af from line 2a Taxable amount—see page 27 of the instructions f Undistributed income for 2009 Subtract lines 4 da from line 2a Taxable amount—see page 27 of the instructions f Undistributed income for 2009 Subtract lines 4 da from line 2a Taxable amount—see page 27 of the instructions f Undistributed income for 2009 Subtract lines 4 da from line 2a Taxable amount—see page 27 of the instructions f Undistributed income for 2009 Subtract lines 4 da from line 6 Taxable distribution carryover from 2004 not applied on line 5 or line 7 (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 1, 592, 743 1, 592, 743 25, 743 26, 684 27, 743 27, 744 28, 745 29, 745 20, 746 20, 746 20, 747 20	4	Qualifying distributions for 2009 from Part	XII,				
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 e Remaining amount distributed out of corpus Excess distributions carryover applied to 2009 (If an amount appears in column (a)) Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 5 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 6b from line 6b Taxable amount—see page 27 of the instructions Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions Undistributed income for 2009 Subtract line 4a from line 17 his amount must be distributed income for 2009 Subtract line 4a distributed income for 2009 Subtract line 4a distributed income for 2009 Subtract line 4a from line 17 his amount must be distributed income for 2009 Subtract line 4a distributed income for 2009 Subtract line 4a distributed income for 2009 Subtract line 4a distributed income for 2009 Subtract line 4a distributed income for 2009 Subtract line 4a distributed income for 2009 Subtract line 5 distributed income for 2009 Subtract line 5 distributed in 2010 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1/6) or 4942(g)(3) (see page 27 of the instructions) Excess from 2006 Excess from 2006 Excess from 2006 Excess from 2008 Excess from 2008 Excess from 2008 Excess from 2008		line 4 ▶ \$953,070					
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Instructions) 8			ı				
8			or the				
applied on line 5 or line 7 (see page 27 of the instructions) 9				· · · · · · · · · · · · · · · · · · ·			
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b Excess from 2006 c Excess from 2007 d Excess from 2008 514,789		· .					
c Excess from 2007 291, 270 d Excess from 2008 514, 789		I					
d Excess from 2008 514,789			291 270				
	_						

₁ Page	1	n	

	990-PF (2009) THE ROBERT A			tructions and Part		Page 10
	rt XIV Private Operating Four				vii-A, question 9)	<u> </u>
1a	If the foundation has received a ruling or of			ating		
b	foundation, and the ruling is effective for 2 Check box to indicate whether the foundation			ribed in section 1	942(J)(3) or 494	2(₁)(5)
2a	Enter the lesser of the adjusted net	Tax year	ting loundation desc	Prior 3 years	9 42()(0) 01 1 494.	
	income from Part I or the minimum	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
	investment return from Part X for	(4) 2000		(-,	(1)	
	each year listed					
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]		
е	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					
а	"Assets" alternative test—enter				1	
	(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					
С	"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					
Pa	art XV Supplementary Inform				ad \$5,000 or moi	e in assets at
	any time during the ye	ear—see page 2	8 of the instruct	ions.)	<u> </u>	
1	Information Regarding Foundation Mar					
а	List any managers of the foundation who					
	before the close of any tax year (but only	if they have contribu	ted more than \$5,000	0) (See section 507(d)(2))	
	ROBERT A. ORTENZIO	100/	4h			
b	List any managers of the foundation who ownership of a partnership or other entity				e portion of the	
	N/A) of which the lounds	dioirnas a 10 % or gr	eater interest		
2	Information Regarding Contribution, G	rant, Gift, Loan, Sch	olarship etc Progr	rams:		
-	F-7 -			table organizations and	does not accept	
	unsolicited requests for funds If the foun		•	=	•	
	organizations under other conditions, cor	-		,		
a	The name, address, and telephone number			ould be addressed		· · · · · · · · · · · · · · · · · · ·
	ROBERT A. ORTENZIO 7					
	4718 GETTYSBURG RD -			SBURG PA 17	055	
b	The form in which applications should be SEE STATEMENT 9	submitted and inform	nation and materials	they should include		
С	Any submission deadlines APPLICATIONS ARE ACC	CEPTED AT A	NY TIME	· · · · · · · · · · · · · · · · · · ·		
d	Any restrictions or limitations on awards,		_	e fields, kinds of instituti	ons, or other factors	
	SEE STATEMENT 10					
						Form 990-PF (2009

Form 990-PF (2009) THE ROBERT AND ANGELA ORTENZIO 25-6843186 Page 11 Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Foundation Recipient Purpose of grant or show any relationship to status of Amount contribution any foundation manager recipient Name and address (home or business) or substantial contributor a Paid during the year N/A SEE SCHEDULE PUBLIC ORGANIZATIONS' EXEMPT PURPOSE 950,202 950,202 Total ▶ 3a Approved for future payment SEE STATEMENT 11 3,957,144 3,957,144 ▶ 3b

Total

Part XVI-A	Analysis of Income-Producing Ac	tivities				
	ounts unless otherwise indicated		d business income	Exclude	d by section 512, 513, or 514	(e)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See page 28 of
1 Program se	rvice revenue					the instructions)
				 		
				-		
				 		
				 		
e f		•		 		
	nd contracts from government agencies	-				• • • • • • • • • • • • • • • • • • • •
-	o dues and assessments		<u> </u>	<u> </u>		
•	savings and temporary cash investments			1		
	and interest from securities			14	130,807	1,351
	ncome or (loss) from real estate					
	nanced property					
	ot-financed property					
	ncome or (loss) from personal property					
7 Other inves	tment income					
8 Gain or (los	s) from sales of assets other than inventory			18	-79,191	
9 Net income	or (loss) from special events					
10 Gross profit	t or (loss) from sales of inventory			<u> </u>		
11 Other rever		-		1 1 4		
	FROM PASS-THRU ENTITY	F 2 5 0 0 C	47.	14	-4,648	
	FROM PASS-THRU ENTITY	525990	472	4		- · · · · · · · · · · · · · · · · · · ·
		-				
e	dd actions (b) (d) and (a)		47:	2	16 968	1,35
	dd columns (b), (d), and (e) line 12, columns (b), (d), and (e)		1 476	<u> </u>		48,79
	t in line 13 instructions on page 28 to verify calculat	tions)				40,10.
Part XVI-E	· · · · · · · · · · · · · · · · · · ·		nent of Exempt F	urpos	es	
Line No.	Explain below how each activity for which incom					9
▼	accomplishment of the foundation's exempt pur instructions)					
4	TAX EXEMPT INTEREST AND	DIVIDEN	DS FROM PAS	SS-TH	RU ENTITY	
_						
						
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		·				
						
						
	 			_		
			 -			
			·			
					· · · · · · · · · · · · · · · · · · ·	
						

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations 1 Did the organization describe or underectly engage in any of the following with any other organization described in section 510 (c) of the Code (other than section 501 (c)(3) organizations) or in section 527, relating to political organizations? 3 Transfers from the eporting foundation to a noncharitable exempt organization of (1) Cash (2) Other assets (3) Other assets (4) Seles of assets from a noncharitable exempt organization (1) Seles of assets from a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Romal of facilities, equipment, or other assets (3) Loans or loan guarantees (3) Loans or loan guarantees (4) Remotivaries of services or membership or fundrasing solicitations (5) Loans or loan guarantees (5) Loans or loan guarantees (6) Performance of services or membership or fundrasing solicitations (7) Exemption of facilities, equipment, mailing lists, other assets, or paid employees (8) If the answer or any of the above or "the; "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 of the goods, other assets, or services given by the reporting foundation if the foundation received less than fair market value of the goods, other assets, or services given by the reporting foundation if the foundation received less than fair market value of the goods, other assets, or services given by the reporting foundation if the foundation received less than fair market value of the goods, other assets, or services given by the reporting foundation if the foundation received less than fair market value of the goods, other assets, or services given by the reporting foundation if the foundation received less than fair market value of the goods, other assets or services given by the reportin	orm	<u>990-PF</u> (2	<u>(009) THE ROBE</u>	R'I' AND	ANGELA ORTEN	710	<u> 25-6843.</u>	<u> 186 </u>		F	Pag€	e 13
1 Del de organization directly or indirectly engage in any of the following with any other organization described in section 501 (ci) of the Code (other than s	Pa	rt XVII	_	_	nsfers To and Tran	sactions ar	nd Relationshi	ps With No	oncharitable			
a Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash (2) Other assets b Other transactions (1) Sales of assets to a noncharidable exempt organization (2) Purchases of assets from a noncharidable exempt organization (3) Rental of facilities, equipment, or other assets (4) Rendering facilities, equipment, or other assets (5) Fedormanic of services or membership or fundrissing solicitations (5) Performanic of services or membership or fundrissing solicitations (6) Rendering facilities, equipment, and analysis (5) Loss of load quarantees (6) Performanic of services or membership or fundrissing solicitations (6) Rendering facilities, equipment, analysis (5) Loss of load quarantees (6) Performanic of services or membership or fundrissing solicitations (6) Rendering facilities, equipment, analysis (5) Loss of load quarantees (6) Performanic of services or removes the services given by the reporting foundation if the foundation received set than far market value in any transaction or sharing arrangement, service value in any transaction or sharing arrangement, service with explaining arrangement and remove the value of the goods, other assets, or services reviewed (a) Line on (b) Amount worked (d) Name of nontrivariable exempt organization (d) Description of transfers, transactions, and sharing arrangement value in any transaction or sharing arrangement for value of the goods, other assets, or services reviewed described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? Ves No	1	Did the or	ganization directly or inc	lirectly engage	e in any of the following w	ith any other or	ganization describ	ed		Υe	s	No
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(2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan guarantees (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations (6) Performance of services or membership or fundraising solicitations (7) A life the aposets, equipment, mailing lists, other assets, or paid employees (8) 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 of 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 given by the reporting foundation of the decidence of the goods, other assets, or services given by the reporting foundation of the decidence of the goods, other assets, or services received (a) Line to (b) Amount involved (c) Hame of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements N/A 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? b if "Yes," complete the following schedule N/A 1b(4) X 1c	b	Other trai	nsactions									
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(a) Rembusement arrangements (b) Loans or loan guarantees (c) Performance of services or membership or fundraising solicitations (d) Performance of services or membership or fundraising solicitations (d) Performance of services or membership or fundraising solicitations (d) If the answer to any of the above is "Yes," complete the following schedule Column (b) should always show the fair market value of the goods, other assets, or services received (a) Line no (D) Amount involved (d) Amount involved (e) Name of mondamoble exempt organization (d) Description of transfers, transactions, and sharing arrangements (d) Line no (D) Amount involved (e) Name of mondamoble exempt organization (d) Description of transfers, transactions, and sharing arrangements (e) Name of organization (e) The Code (other than section 501(c)(3)) or in section 527? Yes No If "Yes," Complete the following schedule		(2) Purch	nases of assets from a n	oncharitable e	exempt organization				11	(2)		X
(5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations (7) Performance of services or membership or fundraising solicitations (8) Performance of services or membership or fundraising solicitations (9) Performance of services or membership or fundraising solicitations (10) Amount involved (10) Amoun		(3) Renta	al of facilities, equipment	t, or other ass	ets				11	(3)		X
(6) Performance of services or membership or fundrising solicitations c Sharing of facilities, equipment, mailing lists, other assels, or paid employees d If the answer to any of the above is "Yes," complete the following schedule Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation if the foundation received less than fair market value in any transaction of sharing arrangement, show in column (d) the value of the goods, other assets or services received (a) Line no (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements N/A 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?		(4) Reim	bursement arrangement	s					11	(4)	_	X
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value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received (a) Line no (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements N/A 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?	ď	If the ans	wer to any of the above	ıs "Yes," com	plete the following schedu	ıle Column (b)	should always sho	w the fair ma	ırket			
(a) Description of transfers, transactions, and sharing arrangements (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements (d) Description of transfers, transactions, and sharing arrangements (e) Name of organization arrangements 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? (a) Name of organization (b) Type of organization (c) Description of relationship (d) Description of relationship (e) Description of relationship (e) Description of relationship (f) TRUSTEE Talle Properer's identifying number (see Signature on number (see Signature o			=	_								
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?	(T						angem	ents	
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?	N/	A										
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described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? Yes No												
described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? Yes No												
described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? Yes No												
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described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? Yes No	,	<u> </u>										
described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? Yes No												
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described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? Yes No	2a	Is the for	indation directly or indire	ctly affiliated	with, or related to, one or	more tax-exem	not organizations					
b If "Yes," complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship N/A Under penalties of perjuny, 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 organization Variable		•	-			•		Г	Yes	X	No	
(c) Description of relationship N/A Under penalties of perjuny, 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 pomplete. Determinon of coreparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge X 8 10 TRUSTEE Title Title Preparer's identifying number (see Signature on page 30 of the instructions) P0 0 4 8 6 8 8 7 Firm's name (or yours if self-employed), address, 4775 LINGLESTOWN ROAD LINGLESTOWN ROAD LINGLESTOWN ROAD	b		` '	•					_	,	لتت	,
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 X 8 10					(b) Type of organizat	ion	(0) Description o	f relationship			
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 X 8 10		N/A	<u>·</u> /				·				_	
belief, it is true, correct and comprete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge X 8 10												-
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belief, it is true, correct and comprete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge X 8 10		Under per	nalties of perjuny, I declare th	at I have exami	ned this return, including acco	mpanying schedi	ules and statements.	and to the best	of my knowledge ar	E		
Signature of officer or trustee Date Date Date Check if self-employed Preparer's signature on page 30 of the instructions) Propage 30 of the instructions page 30 of t		belief, it is	true, correct and complete	_Declaration of	preparer (other than taxpayer	or fiduciary) is ba	sed on all information	of which prepa	rer has any knowled	ge		
Signature of officer or trustee Date Date Date Check if self-employed Preparer's signature on page 30 of the instructions) Propage 30 of the instructions page 30 of t		X	person 11		1	× 11/8/10		TRUSTE	E			
Firm's name (or yours if self-employed), address, MARTIN M. SACKS & ASSOCIATES Self-employed), address, 4775 LINGLESTOWN ROAD EIN ▶ 23-1979781	ø	Signa	ature of officer or trustee				— Tı					
Firm's name (or yours if self-employed), address, MARTIN M. SACKS & ASSOCIATES Self-employed), address, 4775 LINGLESTOWN ROAD EIN ▶ 23-1979781	후			1/			Date					
Firm's name (or yours if self-employed), address, MARTIN M. SACKS & ASSOCIATES Self-employed), address, 4775 LINGLESTOWN ROAD EIN ▶ 23-1979781	- u	· s _	Preparer's	libel A	· sleet				1 1 00			
Firm's name (or yours if self-employed), address, MARTIN M. SACKS & ASSOCIATES Self-employed), address, 4775 LINGLESTOWN ROAD EIN ▶ 23-1979781	Sig.	July Ter	signature		V		11/05/10	Jen-employed	4 7 1 1 1 1 1 1 1			
	3 ,	Pai Se C	Firm's name for yours if	MARTIN	M. SACKS &	ASSOCIA		·				
		£̃ž							EIN ▶ 23-1	979	78	1

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

Schedule of Contributors

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

OMB No 1545-0047

2009

or 990-PF)
Department of the Treasury
Internal Revenue Service

Name of the organization	Employer identification number
THE ROBERT AND ANGELA ORTENZIO	
FAMILY FOUNDATION	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	X 501(c)(3) exempt private foundation							
	4947(a)(1) nonexempt charitable trust treated as a private foundation							
	501(c)(3) taxable private foundation							
	overed by the General Rule or a Special Rule . , (8), or (10) organization can check boxes for both the General Rule and a Special Rule See							
General Rule								
	ng Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or contributor. Complete Parts I and II							
Special Rules								
sections 509(a)(1) and	organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under (170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1 Complete Parts I and							
the year, aggregate co	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							
the year, contributions aggregate to more tha year for an exclusively	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							
990-EZ, or 990-PF), but it mus	is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, st answer "No" on Part IV, line 2 of its Form 990, or check the box in the heading of its Form 990. PE to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-F7							

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)

or 990-PF)

Page 1 of 1 of Part

Name of organization
THE ROBERT AND ANGELA ORTENZIO

Employer identification number 25-6843186

Part I Contributors (see instructions) (d) (a) (c) Name, address, and ZIP + 4 Aggregate contributions Type of contribution No. 1 ROBERT A. ORTENZIO Person 1716 OLMSTEAD WAY EAST Payroll Noncash \$ CAMP HILL PA 17011 (Complete Part II if there is a noncash contribution) (a) (b) (c) (d) Name, address, and ZIP + 4 Aggregate contributions Type of contribution No. 2 ROCCO A. ORTENZIO Person 7 WESTWIND DRIVE Payroll 300,000 Noncash PA 17043 LEMOYNE (Complete Part II if there is a noncash contribution) (a) (b) (c) (d) Type of contribution Aggregate contributions No. Name, address, and ZIP + 4 Person Payroll Noncash (Complete Part II if there is a noncash contribution) (b) (c) (a) Aggregate contributions Type of contribution Name, address, and ZIP + 4 No. Person Payroll \$ Noncash (Complete Part II if there is a noncash contribution) (a) (b) Aggregate contributions Type of contribution Name, address, and ZIP + 4 No. Person Payroll Noncash (Complete Part II if there is a noncash contribution) (a) (b) (c) (d) Name, address, and ZIP + 4 Aggregate contributions Type of contribution No. Person Payroll Noncash (Complete Part II if there is a noncash contribution)

Schedule B (Form 990, 990-EZ, or 990-PF) (2009) Page 1 of 1 Name of organization Employer identification number THE ROBERT AND ANGELA ORTENZIO 25-6843186 Part II **Noncash Property** (see instructions) (a) No. (c) (b) (d) FMV (or estimate) from Description of noncash property given Date received Part I (see instructions) 200,000 SHS SELECT MEDICAL HLDGS 1 12/28/09 2,081,000 \$ (a) No. (c) (b) (d) FMV (or estimate) from Description of noncash property given Date received Part I (see instructions) \$ (c) (a) No. (b) (d) FMV (or estimate) from Description of noncash property given Date received Part I (see instructions) \$ (a) No. (c) (d) FMV (or estimate) from Description of noncash property given Date received Part I (see instructions) \$ (a) No. (c) (b) (d) FMV (or estimate) from Description of noncash property given Date received (see instructions) Part I \$ (a) No. (c) (b) (d) FMV (or estimate) from

(see instructions)

Date received

Part I

Description of noncash property given

•		for Tour on In 1		
Form 990-PF	Capital Gains and Losses	for Tax on Investment In	come	2009
Name	idal year 2005, or tax year beginning	, and chang	Employer Ide	ntification Number
THE ROBERT AND A				
FAMILY FOUNDATIO			25-6843	1
(a) List and deso 2-story brick	cribe the kind(s) of property sold, e.g., real esta warehouse, or common stock, 200 shs MLC 0	te, (b) How acquired P-Purchase D-Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo , day, yr)
1) CAPITAL GAIN D	TSTRIBUTIONS	P-Donation	VARIOUS	VARIOUS
	URITIES	P	VARIOUS	VARIOUS
3) NET LOSS FROM		P	VARIOUS	VARIOUS
	LECT STRATEGY PARTNI		VARIOUS	VARIOUS
	S OIL FUND	P	VARIOUS	VARIOUS
· · · · · · · · · · · · · · · · · · ·	OWERSHARES DB	P	VARIOUS	VARIOUS
(7)				-
(8) (9)				
(9) (10)	 			1
(11)				
(12)				
(13)				
(14)		<u>-</u>		
(15)				
(1) 0	(6) 5	(5) Control than have	(h) 0-	
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(n) Ga (e) plus	in or (loss) (f) minus (g)
(1) 424				424
(2) 2,715,853		2,768,560		<u>-52,707</u>
(3)		21,742		-21,742
(4) 204,856		209,058		-4,202 -1,446
(5) (6) 482		1,446		-1,446 482
(6) 482 (7)				402
(8)			_	
(9)				
(10)				
(11)				
(12)	<u> </u>	<u> </u>		
(13)				
(14) (15)				
(13)				
Complete only for assets show	wing gain in column (h) and owned by the	e 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	(I) Gains col (k), but no Losses ((Col (h) gain minus ot less than -0-) or from col (h))
(1)				424
(2)				-52,707 -21,742
(3)				$\frac{-21,742}{-4,202}$
(4)				-1,446
(6)				482
(7)				
(8)			 	
(9)				
(10)		 	- 	
(11) (12)				
(13)				
(14)				
(15)				

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25-6843186

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	S	-4,648	\$ -4,648	<u> </u>
UBTI FROM PASS-THRU ENTITY	Ψ	472	4,010	Y
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 & AS	\$ CP	\$		\$	\$
	 4,280	_	1,427		 2,853
TOTAL	\$ 4,280	\$_	1,427	\$ (\$ 2,853

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

Description							
	T	otal	-	Net Investment	Adjusted Net		haritable Purpose
EXCISE TAX ON UNRELATED FOREIGN TAX WITHHELD ON	\$	1,000	\$		\$	\$	
101.2101. 11		318		318			
TOTAL	\$	1,318	\$_	318	\$	0 \$	0

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

Description				
	Total	Net Investmen	Adjus t Ne	aritable urpose
\$		\$	\$	\$
EXPENSES				
ASSET MGMT & CUSTODY FEES				
MISCELLANEOUS	6,342	6,3	342	
MISCHEMMEOOS	176	:	161	15
NON-DEDUCTIBLE EXPENSE	9			
DEDUCTIONS FROM INVESTMENT	J			

• 993 •THE ROBERT AND ANGELA ORTENZIO • 25-6843186 Federal Statements

F.YE: 12/31/2009

Description		_					
		Total		let stment	Adjusted Net	_	Charitable Purpose
PASS-THRU ENTITY	\$	18,918	\$	18,918 \$		\$	
TOTAL	\$	25,445	\$	25,421 \$	0	\$ _	15
Statement 5 - Form	990-PF, Pa	art II, Line 1	0a - US a	nd State Gov	vernment Inve	stm	ents
Description	· · · · · · · · · · · · · · · · · · ·						
		Beginn of Ye		End of Year	Basis of Valuation		Fair Market Value
SEE ATTACHED SCHEDULE		\$ 1,073	2,014 \$	538,7	78 MARKET	\$	548,97
TOTAL		\$ 1,072	2,014 \$	538,7	78	\$ =	548,97
Statement 6 -	Form 990-F	PF, Part II, L	ine 10b -	Corporate S	tock Investme	nts	
Statement 6 - Description	Form 990-F					ents	
	Form 990-F	 Beginn	ing	End of	Basis of		Fair Market Value
	Form 990-F	Beginn of Ye	ing ar	End of Year	Basis of Valuation		Value
Description SEE ATTACHED SCHEDULE	Form 990-F	Beginn of Ye	ing ar 4,072 \$	End of Year 473,2	Basis of Valuation 06 MARKET	 \$_	Value 2,620,089
Description	Form 990-F	Beginn of Ye	ing ar	End of Year	Basis of Valuation 06 MARKET		
Description SEE ATTACHED SCHEDULE		## Beginn of Ye \$ 54 \$ 54	ing ar 4,072 \$ 4,072 \$	End of Year 473,2 473,2	Basis of Valuation 06 MARKET	\$ - \$ - \$ <u>-</u>	Value 2,620,08
Description SEE ATTACHED SCHEDULE TOTAL		## Beginn of Ye \$ 54 \$ 54	ing ar 4,072 \$ 4,072 \$	End of Year 473,2 473,2	Basis of Valuation 06 MARKET	\$ - \$ - \$ <u>-</u>	Value 2,620,08
Description SEE ATTACHED SCHEDULE TOTAL Statement 7 - Description		## Beginn of Ye \$ 54 \$ 54	ing ar 4,072 \$ 4,072 \$ ine 10c -	End of Year 473,2 473,2	Basis of Valuation 06 MARKET	\$_ \$_ ents	Value 2,620,08
Description BEE ATTACHED SCHEDULE TOTAL Statement 7 -		Beginn of Ye \$ 54 \$ 54 PF, Part II, I Beginn of Ye	ing ar 4,072 \$ 4,072 \$ ine 10c -	End of Year 473, 2 473, 2 Corporate E End of Year	Basis of Valuation 06 MARKET 06 Bond Investme Basis of Valuation	\$_ \$_ ents	Value 2, 620, 08 2, 620, 08 Fair Market

993 •THE ROBERT AND ANGELA ORTENZIO

25-6843186

Federal Statements

FYE: 12/31/2009

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:	\$	\$			Ş	
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 UNIVERS	TY OF 326 N	ARKET STREET HARRISBURG PA 17101	
N/A	PUBLIC	CONSTRUCT EDUCATIONAL FACILITY	757,145

993 • THE ROBERT AND ANGELA ORTENZIO
25-6843186 Federal Statements

25-6843186

FYE: 12/31/2009

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

Name		Address	Address	
Relationship	Status	Purpo	ose	Amount
UNIVERSITY OF NOTRE	PUBLIC	OLD MAIN CONSTRUCT BUILDING MAIN BUILDING CONSTRUCT EDUCATION	UNIVERSITY PARK PA NOTRE DAME IN 4655 VAL FACILITY	199,999
TOTAL			=	3,957,144

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FORM 990-PF - 2009

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

	Trade			Unit	Cost				
Symbol	Date	Quantity	Description	Cost	Basis				
FIXED INCOM	ME.								
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				
					1,072,013.67				

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FORM 990-PF - 2009

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

~	Symbol	Trade Date	Quantity	Description	Unit Cost	Cost Basis	Current Price	Current Value
	FIXED INCO Governmen							
	3133XKQ87	05/02/2007	150,000	Federal Home Lo 05/07/2012 5 05 Call 05/07/2010,	100 00	150,000.00	101.59	152,390 63
	DODIX	06/11/2000	4 100 140	Accrued Income	10.41			1,136 25
		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
						538,778 04		548,977.15
					=		=	

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FORM 990-PF - 2009

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

Symbol	Trade Date	Quantity	Description	Unit Cost	Cost Basis
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
				•	320,258 02
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
				-	71,416 24
Swell Can					
Small Cap IJR	10/06/2008	400	Shares SC S&P 6	52 09	20,836 48
VB	08/14/2008	750	Vanguard Small	66.54	49,905.00
, <u>D</u>	00/1 // 2000	,,,,	· angular o man		
					70,741.48
Internation	ıl				
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
				•	81,656.37
					544,072 11
				=	J+7,072 11

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FORM 990-PF - 2009

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

Symbol	Trade Date	Quantity	Description	Unit Cost	Cost Basis	Current Price	Current Value
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
Internation	nal						
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	ıShares MSCI Em	26 13	18,421 65	41 50	29,257 50
				-	473,206 05		2,620,089.27

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FORM 990-PF - 2009

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

Symbol	Trade Date	Quantity	Description	Unit Cost	Cost Basis
FIXED INCO					
Certificate 02341VWQ4	11/25/2008	50,000	Amcore Bank CD 06/03/2010 3 95	100.00	50,000 00
17284PKF1	06/01/2006	69,000	Accrued Income 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
			Accided income	•	318,000 00
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	99 95	19,990 00
98151GAA3	12/02/2008	20,000	Accrued Income Wells Fargo 12/15/2009 4 125 Accrued Income	97 06	19,412.50
					232,874 90
					550,874.90

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FORM 990-PF - 2009

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

FIXED INCON Certificate of							
02341VWQ4	11/25/2008	50,000	Amcore Bank CD 06/03/2010 3 95	100 00	50,000 00	100 00	50,000 00
105133EF5	02/26/2009	50,000	Accrued Income Branch Banking 03/11/2011 2.50	100 00	50,000 00	100 00	162 58 50,000 00
320432AU1	03/19/2007	99,000	Accrued Income First Guaranty Ba 03/29/2010 5 00	100 00	99,000 00	100 00	385 02 99,000 00
446438JX2	12/08/2008	50,000	Accrued Income Huntington Natio 06/14/2010 3 55	100 00	50,000 00	100 00	27 50 50,000.00
69912SBG4	07/08/2008	50,000	Accrued Income Paragon National 01/19/2010 4 05 Accrued Income	100 00	50,000 00	100 00	97.35 50,000 00
86789VHM2	05/18/2009	75,000	Suntrust Bank CD 05/28/2014 4 00	100 00	75,000 00	100 00	946 40 75,000 00
			Accrued Income	_	374,000 00	_	279 96 375,898 81
Foreign Bo	nd						
Q081859B0	12/15/2009	25,000	Australian Govern 06/15/2011 5 40 Accrued Income	92 98	23,244 60	91 62	22,905 00 63 05

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FORM 990-PF - 2009

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

Symbol	Trade <u>Date</u>	Quantity	Description	Unit Cost	Cost Basis	Current Price	Current Value
Corporate I 02209SAF0	02/10/2009	30,000	Phillip Morris Co 06/22/2010 7 125	103 50	31,050 00	102 80	30,840 00
084664BK6	03/31/2009	20,000	Accrued Income Berkshire Hathaw 04/15/2012 4 00	100 46	20,091 00	104 80	53.44 20,959 40
126650BG4	04/02/2009	25,000	Accrued Income CVS Corp Bond 06/01/2010 1 561	97.18	24.296 00	100 04	168 89 25,010 35
22541LBJ1	01/08/2009	25,000	Accrued Income Credit Suisse First 08/15/2010 0 472	95 90	23,975 00	100 09	228 68 25,023 58
36962G2S2	05/06/2009	40,000	Accrued Income General Electric C 12/01/2010 5 00	102 22	40,888 80	104 00	15 09 41,600 24
36962GR89	12/15/2009	25,000	Accrued Income General Electric F 07/27/2012 0 451	97 46	24,365 50	97 68	166 67 24,419 50
38141GAZ7	03/19/2009	20,000	Accrued Income Goldman Sachs 01/15/2011 6 875	101 67	20,333 00	106 04	20 71 21,208 52
38141GBU7	05/20/2009	20,000	Accrued Income Goldman Sachs 11/15/2012 6 00	105.57	21,113 20	108 71	634 03 21,742 78
38141GEF7	03/18/2009	40,000	Accrued Income Goldman Sachs 01/15/2011 5 00	98 75	39,500 00	104 15	553 33 41,660 00
46625HDD9	03/26/2009	20,000	Accrued Income JP Morgan Chase 01/17/2011 4 60	100 16	20,032 87	103.46	923 91 20,691 68
617446GM5	06/10/2009	35,000	Accrued Income Morgan Stanley 04/15/2011 6 75	104 81	36.682 45	106 15	429 33 37,152 50
61746SBC2	01/07/2009	35,000	Accrued Income Morgan Stanley 01/15/2010 4 00	99 00	34,650 00	100 07	498 7: 35,025.4:
635405AW3	02/05/2009	30,000	Accrued Income PNC Covertible B 02/01/2011 4 00	93 88	28,162 50	101 88	645 56 30,562 56
69352JAC1	05/05/2009	40,000	Accrued Income PPL Electric Utili 11/01/2011 6.40	104 60	41,840 00	107 45	500 0 42,980 8
			Accrued Income				426 6
816196AJ8	12/04/2008	100,000	Select Medical Co 02/01/2015 7 625 Call 02/01/2010,	59 70	59,700 00	97 25	97,250 0
91324PAV4	02/19/2009	25,000	Accrued Income United Health Gr 06/21/2010 1 705 Call 03/21/2010,	96 75	24,187 50	99 84	3,177.0 24,960 4
PHYDX VFSTX	06/11/2009 02/12/2009	6,901.829 12,356 444	Pimco High Yield	7 64 10 01 _	52,702 35 123,677 30	8 80 10 59	60,736 1 130,854 7
				-	667,247 47	_	741,120 8
				1	,064,492.07		1,139,987.6

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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	\$ 300,000

Total Donations - 2009

\$ 950,202

Form **8868**

Application for Extension of Time To File an Exempt Organization Return

(Rev April 2009	9)	Exempt Organization Return			OMB No 1545-1709	
Department of t	partment of the Treasury rnal Revenue Service File a separate application for each return.					
		Itomatic 3-Month Extension, complete only Part I and check this box			▶ X	
-	-	iditional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this form	۱)		 -	
-	•	ess you have already been granted an automatic 3-month extension on a previously filed Fo		88		
Part I	Automati	c 3-Month Extension of Time. Only submit original (no copies needed)				
A		Form 000 T and requesting an automatic 6 month extension, shock this have and complete				
Part I only	required to tile	Form 990-T and requesting an automatic 6-month extension—check this box and complete	,		▶ 🗌	
•	orations (includ come tax return	ing 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an ext s	ension	of		
Electronic Fil	ling (e-file). Ge	nerally, you can electronically file Form 8868 if you want a 3-month automatic extension of	time to	file		
one of the ret	urns noted belo	ow (6 months for a corporation required to file Form 990-T) However, you cannot file Form 8	868			
electronically	ıf (1) you want	the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 887	0, grou	ıp		
returns, or a c	composite or co	insolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (P	art II) d	f Form		
8868 For mo	re details on the	e electronic filing of this form, visit www.irs.gov/efile and click on e-file for Charities & Nonpr	ofits			
Type or	Name of Exe	empt Organization	Employ	er ident	ification number	
print		BERT AND ANGELA ORTENZIO				
File by the			25-6	8431	86	
due date for		eet, and room or suite no. If a P.O. box, see instructions				
filing your		ETTYSBURG ROAD - SUITE 405				
return See Instructions		post office, state, and ZIP code. For a foreign address, see instructions		······································		
		ICSBURG PA 17055				
Check type of		iled (file a separate application for each return)				
Form 99		Form 990-T (corporation)			Form 4720	
Form 99	90-BL	Form 990-T (sec. 401(a) or 408(a) trust)		П	Form 5227	
Form 99		Form 990-T (trust other than above)		\vdash	Form 6069	
X Form 99		Form 1041-A		-	Form 8870	
The books	s are in the care	e of ▶				
Telephone	e No. ▶	FAX No ▶				
=		not have an office or place of business in the United States, check this box			▶ □	
_			this is		, III	
	group, check th					
		is of all members the extension will cover	u0//			
		3-month (6 months for a corporation required to file Form 990-T) extension of time				
•		, to file the exempt organization return for the organization named above. The extension is				
	rganization's re	· · · · · · · · · · · · · · · · · · ·				
	calendar year					
	tax year beginn					
اللا	tax year beginn	ing , and ending				
2 If this tax	x year is for les	s than 12 months, check reason Initial return Final return Change in	accoun	ting perio	od	
3a If this ap	plication is for	Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax,	T			
•	•	credits See instructions	3a	\$	1,608	
		Form 990-PF or 990-T, enter any refundable credits and estimated tax	1	-		
•	•	le any prior year overpayment allowed as a credit	3ь	\$	1,108	
		line 3b from line 3a. Include your payment with this form, or, if required,	† <u> </u>		1, 200	
		on or, if required, by using EFTPS (Electronic Federal Tax Payment]			
•	See instructio		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 (R	ev 4-2009)			Page 2
If you are	filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II and check this box			► X
Note. Only co	mplete 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	CODI	es needed).	
Type or		Employ	er identificatio	on number
print	THE ROBERT AND ANGELA ORTENZIO			
File by the			<u>843186</u>	
extended due date for		For IRS	use only	
filing the	4718 GETTYSBURG ROAD - SUITE 405		····	
return See	City, town or post office, state, and ZIP code For a foreign address, see instructions			•
instructions	MECHANICSBURG PA 17055			
Check type of	return to be filed (File a separate application for each return).			
Form 99			—	6069
Form 99			☐ Form	8870
Form 99	<u> </u>			
	complete Part II if you were not already granted an automatic 3-month extension on a previously file	d Form	8868.	
	are in the care of ▶ ROBERT L. NAUSE			
Telephone	No ▶ .717-972-130.5 FAX No. ▶			
If the organ	nization 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)	s		
or the whole g	roup, check this box 📗 . If it is for part of the group, check this box 🕨 🔲 and	attach	а	
	nes and EINs of all members the extension is for			·
4 I request	an additional 3-month extension of time until $\lfloor 11/15/10 floor$			
5 For caler				
6 If this tax	year is for less than 12 months, check reason:	account	ing period	
	letail why you need the extension			
ADDI'	TIONAL TIME IS REQUESTED TO GATHER INFORMATION TO PR	REPA	RE A COM	MPLETE
AND A	ACCURAȚE RETURN.			
8a If this app	olication 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 app	olication is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and	1 1		
estimated	tax payments made. Include any pnor year overpayment allowed as a credit and any			
amount p	aid 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			
	perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my	knowie	dge and belief,	
is true, correct, a	and complete, and that I am authorized to prepare this form			
ignature	illud A. Shif Title > C/A		Date ▶ 0	8/11/10
	• ——		Form 886	8 (Rev 4-2009)