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Return of Private Foundation

OMB No 1545-0052

2009

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

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

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

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation THE BAKER/MERINE FAMILY FOUNDATION, INC.		A Employer identification number 26-0016221
	Number and street (or P O box number if mail is not delivered to street address) 6618 MARYWOOD ROAD		B Telephone number 301-469-8997
	City or town, state, and ZIP code BETHESDA, MD 20817-2204		C If exemption application is pending, check here ☐
	City or town, state, and ZIP code BETHESDA, MD 20817-2204		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 461,736. (Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) _____			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		76,551.		N/A	
2 Check ☐ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		3,642.	3,642.		STATEMENT 1
4 Dividends and interest from securities		3,537.	3,537.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		443.			
b Gross sales price for all assets on line 6a		72,416.			
7 Capital gain net income (from Part IV, line 2)			443.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		550.	550.		STATEMENT 3
12 Total. Add lines 1 through 11		84,723.	8,172.		
13 Compensation of officers, directors, trustees, etc		18,721.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 4		1,850.	740.		0.
c Other professional fees					
17 Interest					
18 Taxes STMT 5		100.	0.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 6		2,097.	1,521.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		22,768.	2,261.		0.
25 Contributions, gifts, grants paid		13,650.			13,650.
26 Total expenses and disbursements. Add lines 24 and 25		36,418.	2,261.		13,650.
27 Subtract line 26 from line 12.		48,305.			
a Excess of revenue over expenses and disbursements			5,911.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year		End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing				
	2 Savings and temporary cash investments	103,043.	102,334.	102,334.	
	3 Accounts receivable ▶				
	Less allowance for doubtful accounts ▶				
	4 Pledges receivable ▶ 76,551.				
	Less allowance for doubtful accounts ▶	81,774.	76,551.	76,551.	
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons				
	7 Other notes and loans receivable ▶				
	Less allowance for doubtful accounts ▶				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments - U.S. and state government obligations				
	b Investments - corporate stock STMT 7	100,093.	189,551.	189,551.	
	c Investments - corporate bonds STMT 8	89,927.	92,083.	92,083.	
Liabilities	11 Investments - land, buildings, and equipment basis ▶				
	Less accumulated depreciation ▶				
	12 Investments - mortgage loans				
	13 Investments - other				
	14 Land, buildings, and equipment basis ▶				
	Less accumulated depreciation ▶				
	15 Other assets (describe ▶ STATEMENT 9)	1,350.	1,217.	1,217.	
	16 Total assets (to be completed by all filers)	376,187.	461,736.	461,736.	
	17 Accounts payable and accrued expenses	49.	49.		
	18 Grants payable				
Net Assets or Fund Balances	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe ▶)				
	23 Total liabilities (add lines 17 through 22)	49.	49.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ ☒				
	24 Unrestricted	376,138.	461,687.		
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ ☐				
	27 Capital stock, trust principal, or current funds				
	28 Paid-in or capital surplus, or land, bldg, and equipment fund				
	29 Retained earnings, accumulated income, endowment, or other funds	376,138.	461,687.		
Net Assets or Fund Balances	30 Total net assets or fund balances	376,138.	461,687.		
	31 Total liabilities and net assets/fund balances	376,187.	461,736.		

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	376,138.
2 Enter amount from Part I, line 27a	2	48,305.
3 Other increases not included in line 2 (itemize) ▶ CHANGE IN FMV OF ASSETS	3	37,244.
4 Add lines 1, 2, and 3	4	461,687.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	461,687.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b SEE ATTACHED STATEMENT			
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 72,416.		71,973.	443.

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			443.

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	443.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	31,155.	257,737.	.120879
2007	31,680.	255,984.	.123758
2006	27,223.	245,806.	.110750
2005	17,010.	232,985.	.073009
2004	18,701.	246,367.	.075907

2 Total of line 1, column (d)	2	.504303
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	.100861
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	278,875.
5 Multiply line 4 by line 3	5	28,128.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	59.
7 Add lines 5 and 6	7	28,187.
8 Enter qualifying distributions from Part XII, line 4	8	13,650.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		1	118.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 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	118.
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	118.
6 Credits/Payments.			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	40.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	40.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ 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	78.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
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 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 ☐ \$ 0. (2) On foundation managers ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ MD		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► THE DIRECTORS Located at ► 6618 MARYWOOD ROAD, BETHESDA, MD	Telephone no	► 301-469-8997	
		ZIP+4	► 20817-2204	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	► 15		N/A

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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 ☒ No ☐ Yes ☒ No ☐ Yes ☒ No ☒ Yes ☐ No ☐ Yes ☒ No ☐ Yes ☒ 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		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?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? If "Yes," list the years ►	☐ Yes ☒ 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 instructions.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☐

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

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

6b

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

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

☐ Yes ☒ No

7b

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

N/A

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
MARLA M. BAKER 6618 MARYWOOD ROAD BETHESDA, MD 20817	DIRECTOR 2.00	9,361.	0.	0.
ROBERT BAKER 6618 MARYWOOD ROAD BETHESDA, MD 20817	DIRECTOR 2.00	9,360.	0.	0.

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

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

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

0

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

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

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

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A DIRECT CONTRIBUTIONS TO OTHER CHARITIES ONLY.	
	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	206,344.
b	Average of monthly cash balances	1b	76,778.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	283,122.
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	283,122.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	4,247.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	278,875.
6	Minimum investment return. Enter 5% of line 5	6	13,944.

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

1	Minimum investment return from Part X, line 6	1	13,944.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	118.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	118.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	13,826.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	13,826.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	13,826.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	13,650.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	13,650.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	13,650.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				13,826.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004	6,481.			
b From 2005	5,491.			
c From 2006	15,187.			
d From 2007	19,121.			
e From 2008	18,408.			
f Total of lines 3a through e	64,688.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$	13,650.			
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				13,650.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (if an amount appears in column (d), the same amount must be shown in column (a))	176.			176.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	64,512.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr			0.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	6,305.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	58,207.			
10 Analysis of line 9				
a Excess from 2005	5,491.			
b Excess from 2006	15,187.			
c Excess from 2007	19,121.			
d Excess from 2008	18,408.			
e Excess from 2009				

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

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

[illegible]

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

- b If "Yes," complete the following schedule**

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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

Sign Here

Signature of officer or trustee

Date _____

Title

Preparer's
signature

Date _____

☐ Check if self-employed

Preparer's identifying number

Firm's name (or yours
if self-employed),
address, and ZIP code

BRUCE W. ROBINETTE, CPA
449-A CARLISLE DRIVE
HERNDON, VA 20170

EIN

PIA

Phone no

703-834-6686

Form **990-PF** (2009)

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

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

OMB No 1545-0047

2009

Name of the organization

Employer identification number

THE BAKER/MERINE FAMILY FOUNDATION, INC.

26-0016221

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

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

Form 990-PF

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

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

Special Rules

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

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

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

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

Name of organization

Employer identification number

THE BAKER/MERINE FAMILY FOUNDATION, INC.

26-0016221

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	ALLAN A. MERINE CHARITABLE LEAD TRUST #2 6618 MARYWOOD ROAD BETHESDA, MD 208172204	\$ 76,551.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

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	10000 FFCB 5.300%	P	04/11/08	03/03/09
b	10000 FHLB 5.650%	P	04/18/08	01/30/09
c	10000 FHLB 5.700%	P	07/08/08	02/06/09
d	10000 FHLB 6.000%	P	06/16/08	01/13/09
e	10000 FFCB 5.450%	P	06/06/08	06/12/09
f	10000 FHLB 5.250%	P	04/18/08	05/15/09
g	10000 FHLB 5.750%	P	11/19/07	11/23/09
h	40 KIMBERLY-CLARK CORP	P	11/20/02	10/21/09
i				
j				
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 10,000.		10,000.	0.
b 10,000.		9,995.	5.
c 10,000.		9,985.	15.
d 10,000.		10,000.	0.
e 10,000.		10,000.	0.
f 10,000.		9,998.	2.
g 10,000.		10,000.	0.
h 2,416.		1,995.	421.
i			
j			
k			
l			
m			
n			
o			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			0.
b			5.
c			15.
d			0.
e			0.
f			2.
g			0.
h			421.
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7
If (loss), enter "-0-" in Part I, line 7 }

2

443.

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)

If gain, also enter in Part I, line 8, column (c)

If (loss), enter "-0-" in Part I, line 8

3

N/A

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

<u>SOURCE</u>	<u>AMOUNT</u>
CHEVY CHASE TRUST COMPANY	3,642.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	3,642.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

<u>SOURCE</u>	<u>GROSS AMOUNT</u>	<u>CAPITAL GAINS DIVIDENDS</u>	<u>COLUMN (A) AMOUNT</u>
CHEVY CHASE TRUST COMPANY	3,537.	0.	3,537.
TOTAL TO FM 990-PF, PART I, LN 4	3,537.	0.	3,537.

FORM 990-PF OTHER INCOME STATEMENT 3

<u>DESCRIPTION</u>	<u>(A) REVENUE PER BOOKS</u>	<u>(B) NET INVEST- MENT INCOME</u>	<u>(C) ADJUSTED NET INCOME</u>
OTHER	550.	550.	
TOTAL TO FORM 990-PF, PART I, LINE 11	550.	550.	

FORM 990-PF ACCOUNTING FEES STATEMENT 4

<u>DESCRIPTION</u>	<u>(A) EXPENSES PER BOOKS</u>	<u>(B) NET INVEST- MENT INCOME</u>	<u>(C) ADJUSTED NET INCOME</u>	<u>(D) CHARITABLE PURPOSES</u>
TAX RETURN PREPARATION	1,850.	740.		0.
TO FORM 990-PF, PG 1, LN 16B	1,850.	740.		0.

FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX PAID	100.	0.		0.
TO FORM 990-PF, PG 1, LN 18	100.	0.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	1,521.	1,521.		0.
ADMINISTRATIVE EXPENSES	576.	0.		0.
TO FORM 990-PF, PG 1, LN 23	2,097.	1,521.		0.

FORM 990-PF	CORPORATE STOCK	STATEMENT	7
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITIES-STMT ATTACHED	189,551.	189,551.
TOTAL TO FORM 990-PF, PART II, LINE 10B	189,551.	189,551.

FORM 990-PF	CORPORATE BONDS	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
INTERMEDIATE BONDS-STMT ATTACHED	92,083.	92,083.
TOTAL TO FORM 990-PF, PART II, LINE 10C	92,083.	92,083.

FORM 990-PF	OTHER ASSETS	STATEMENT	9
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
ACCRUED INTEREST & DIVIDENDS	1,350.	1,217.	1,217.
TO FORM 990-PF, PART II, LINE 15	1,350.	1,217.	1,217.

FORM 990-PF	GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR	STATEMENT	10
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RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
COALITION FOR PULMONARY FIBROSIS - LSSMF 10866 W. WASHINGTON BLVD #343 CULVER CITY, CA 90232	N/A GENERAL FUND	PUBLIC	500.
DISTRICT OF COLUMBIA ARTS CENTER 2438 18 ST NW WASHINGTON, DC 20009	N/A GENERAL FUND	PUBLIC	1,000.
MASQUERADE OF TAMPA BAY, INC 4701 DUNNIE DRIVE TAMPA, FL 33614	N/A GENERAL FUND	PUBLIC	500.
MONTGOMERY COUNTY HUMANE SOCIETY 14645 ROTHGEB DRIVE ROCKVILLE, MD 20850	N/A GENERAL FUND	PUBLIC	2,600.
MOST VALUABLE KIDS 11122 STEPHALEE LANE ROCKVILLE, MD 20852	N/A GENERAL FUND	PUBLIC	1,000.
SECOND CHANCE WILDLIFE CENTER 7101 BARCELONA DRIVE GAITHERSBURG, MD 20879	N/A GENERAL FUND	PUBLIC	1,000.

THE BAKER/MERINE FAMILY FOUNDATION, INC.

26-0016221

SHINE GLOBAL, INC 225 MIDLAND AVENUE MONTCLAIR, NJ 07042	N/A GENERAL FUND	PUBLIC	2,850.
THE ANN FRANK HOUSE, INC 2850 QUEBEC STREET NW WASHINGTON, DC 20008	N/A GENERAL FUND	PUBLIC	500.
MENTAL HEALTH ASSOCIATION OF MONTGOMERY COUNTY 1000 TWINBROOK PARKWAY ROCKVILLE, MD 20851	N/A GENERAL FUND	PUBLIC	250.
TULANE UNIVERSITY 6823 ST. CHARLES AVENUE NEW ORLEANS, LA 70118	N/A GENERAL FUND	PUBLIC	100.
UNIVERSITY OF FLORIDA 2020 W UNIVERSITY AVE GAINESVILLE, FL 32603	N/A GENERAL FUND	PUBLIC	100.
NATIONAL KIDNEY FOUNDATION OF NATIONAL CAPITAL AREA 5335 WISCONSIN AVENUE NW WASHINGTON , DC 20015	N/A RONALD PAUL PATIENT MEDICATION FUND	PUBLIC	250.
NARAL PRO-CHOICE AMERICA FOUNDATION 1156 15TH STREET, NW SUITE 700 WASHINGTON, DC 20005	N/A GENERAL FUND	PUBLIC	3,000.
TOTAL TO FORM 990-PF, PART XV, LINE 3A			<u>13,650.</u>

CLIENT APPRAISAL
Heritage Investors Management Corporation
1165 - BAKER/MERINE FAM FOUNDAT
December 31, 2009

Quantity	Security Description	Purchase Information		Current Market		% Market Value	Indicated Annual Income	Current Yield %
		Unit	Original Cost	Unit	Market Value			
102,334.0100	SEI DAILY INCOME TRUST GOVERNMENT II FUND-B	\$ 1.00	\$ 102,334.01	\$ 1.00	\$ 102,334.01	26.57%	\$ 20.47	0.02%
Total Cash			102,334.01		102,334.01	26.57%	20.47	0.02%
Equity And Related								
Consumer Discretionary								
150.0000	ABERCROMBIE & FITCH CO	38.42	5,762.40	34.85	5,227.50	1.36%	105.00	2.01%
200.0000	HARLEY DAVIDSON INC	35.07	7,014.84	25.20	5,040.00	1.31%	80.00	1.59%
90.0000	HOME DEPOT INC	28.25	2,542.30	28.93	2,603.70	0.68%	81.00	3.11%
150.0000	LIZ CLAIBORNE INC	36.33	5,449.88	5.63	844.50	0.22%	0.00	0.00%
80.0000	MCDONALDS CORP	51.66	4,132.88	62.44	4,995.20	1.30%	176.00	3.52%
Total Consumer Discretionary			24,902.40		18,710.90	4.86%	442.00	2.36%
Consumer Staples								
100.0000	ALTRIA GROUP INC	11.83	1,182.51	19.63	1,963.00	0.51%	136.00	6.93%
62.0000	BROWN FORMAN CORP CL B	51.90	3,217.87	53.57	3,321.34	0.86%	74.40	2.24%
80.0000	COCA COLA CO	42.04	3,363.20	57.00	4,560.00	1.18%	131.20	2.88%
150.0000	CONSTELLATION BRANDS INC CL A	28.44	4,266.50	15.93	2,389.50	0.62%	0.00	0.00%
75.0000	PEPSICO INC	61.48	4,610.91	60.80	4,560.00	1.18%	135.00	2.96%
75.0000	PHILIP MORRIS INTL INC	22.51	1,688.03	48.19	3,614.25	0.94%	174.00	4.81%
100.0000	WAL MART STORES INC	52.91	5,290.51	53.45	5,345.00	1.39%	109.00	2.04%
Total Consumer Staples			23,619.53		25,753.09	6.69%	759.60	2.96%
Energy								
60.0000	APACHE CORP	63.32	3,799.33	103.17	6,190.20	1.61%	36.00	0.58%
60.0000	CHEVRON CORP	35.24	2,114.27	76.99	4,618.40	1.20%	163.20	3.53%
100.0000	CONOCOPHILLIPS	57.42	5,741.99	51.07	5,107.00	1.33%	200.00	3.92%
75.0000	SCHLUMBERGER LTD	64.39	4,829.02	65.09	4,881.75	1.27%	63.00	1.29%
Total Energy			16,484.61		20,798.35	5.40%	462.20	2.22%
Financials								
70.0000	AMERICAN EXPRESS CO	33.50	2,344.84	40.52	2,836.40	0.74%	50.40	1.78%

CLIENT APPRAISAL

Heritage Investors Management Corporation

1165 - BAKER/MERINE FAM FOUNDAT

December 31, 2009

Quantity	Security Description	Purchase Information		Current Market		% Market Value	Indicated Annual Income	Current Yield %
		Unit	Cost	Unit	Market Value			
70.0000	CITIGROUP INC	37.72	2,640.40	3.31	231.70	0.06%	0.00	0.00%
100.0000	JPMORGAN CHASE & CO	35.58	3,557.99	41.67	4,167.00	1.08%	20.00	0.48%
25.0000	MASTERCARD INC	168.21	4,205.20	255.98	6,399.50	1.66%	15.00	0.23%
100.0000	MORGAN STANLEY	40.33	4,033.46	29.60	2,960.00	0.77%	20.00	0.68%
80.0000	SLM CORP	49.79	4,481.27	11.27	1,014.30	0.26%	0.00	0.00%
	Total Financials		21,263.16		17,608.90	4.57%	105.40	0.60%
Health Care								
80.0000	AMGEN INC	48.95	3,916.00	56.57	4,525.60	1.17%	0.00	0.00%
75.0000	BAXTER INTERNATIONAL INC	50.09	3,757.03	58.68	4,401.00	1.14%	87.00	1.98%
75.0000	JOHNSON & JOHNSON	54.62	4,096.50	64.41	4,830.75	1.25%	147.00	3.04%
125.0000	MEDTRONIC INC	33.93	4,241.25	43.98	5,497.50	1.43%	102.50	1.86%
200.0000	PFIZER INC	28.82	5,784.98	18.19	3,638.00	0.94%	144.00	3.96%
75.0000	TEVA PHARMACEUTICAL SP ADR	43.67	3,275.62	56.18	4,213.50	1.09%	36.15	0.86%
	Total Health Care		25,071.38		27,106.35	7.04%	516.65	1.91%
Industrials								
50.0000	3M CO	78.82	3,941.00	82.67	4,133.50	1.07%	102.00	2.47%
100.0000	BOEING CO	63.90	6,389.59	54.13	5,413.00	1.41%	168.00	3.10%
150.0000	GENERAL ELECTRIC CO	27.06	4,058.73	15.13	2,269.50	0.59%	60.00	2.64%
150.0000	PACCAR INC	38.36	5,753.84	36.27	5,440.50	1.41%	54.00	0.99%
80.0000	UNITED TECHNOLOGIES CORP	42.00	3,360.24	69.41	5,552.80	1.44%	123.20	2.22%
	Total Industrials		23,503.40		22,809.30	5.92%	507.20	2.22%
Information Technology								
100.0000	AUTOMATIC DATA PROCESSING INC	42.43	4,242.60	42.82	4,282.00	1.11%	136.00	3.18%
200.0000	CISCO SYSTEMS INC	23.25	4,650.34	23.94	4,788.00	1.24%	0.00	0.00%
300.0000	E M C CORP	15.42	4,626.75	17.47	5,241.00	1.36%	0.00	0.00%
100.0000	HEWLETT PACKARD CO	47.24	4,723.69	51.51	5,151.00	1.34%	32.00	0.62%
200.0000	INTEL CORP	15.40	3,080.50	20.40	4,080.00	1.06%	112.00	2.75%
40.0000	INTERNATIONAL BUSINESS MACHINES	91.06	3,642.40	130.90	5,236.00	1.36%	88.00	1.68%
200.0000	MICROSOFT CORP	30.13	6,025.86	30.48	6,096.00	1.58%	104.00	1.71%

CLIENT APPRAISAL
Heritage Investors Management Corporation
1165 - BAKER/MERINE FAM FOUNDAT
December 31, 2009

	Purchase Information		Current Market		% Market Value	Indicated Annual Income	Current Yield %
	Unit	Original Cost	Unit	Total Market Value			
	Cost		Market				
Total Information Technology							
Materials		30,992.14		34,874.00	9.05%	472.00	1.36%
65.0000	AIR PRODUCTS & CHEMICALS INC	51.84	3,369.70	81.06			
150.0000	ALCOA INC	17.47	2,619.88	16.12	5,268.90	117.00	2.22%
50.0000	MARTIN MARIETTA MATERIALS INC	108.97	5,448.51	89.41	2,418.00	18.00	0.74%
Total Materials			11,438.09		4,470.50	80.00	1.79%
Other Equities					12,157.40	215.00	1.77%
100.0000	ISHARES TR MSCI EAFE IDX	65.57	6,557.09	55.28	5,528.00	144.10	2.61%
Total Other Equities			6,557.09		5,528.00	144.10	2.61%
Telecommunication Services							
150.0000	AT&T INC	21.26	3,189.19	28.03	4,204.50	252.00	5.99%
Total Telecommunication Services			3,189.19		4,204.50	252.00	5.99%
Total Equity And Related			187,020.99		189,550.79	3,876.15	2.05%
Fixed Income And Related							
Intermediate							
10,000.0000	DISNEY WALT CO 4.500 12/15/2013	101.19	10,118.60	106.22	10,622.46	450.00	4.24%
10,000.0000	GENERAL ELECTRIC CO 5.250 12/06/2017	99.80	9,980.00	102.19	10,218.65	525.00	5.14%
10,000.0000	VERIZON COMMUNICATIONS 5.500 02/15/2018	99.95	9,994.50	104.36	10,435.71	550.00	5.27%
10,000.0000	FPL GROUP CAP INC 6.000 03/01/2019	103.44	10,343.80	107.70	10,769.91	600.00	5.57%
10,000.0000	DU PONT E I DE NEMOURS 5.750 03/15/2019	97.00	9,700.00	107.22	10,721.63	575.00	5.36%
10,000.0000	FEDERAL HOME LOAN BANKS 4.700 08/05/2019	100.00	10,000.00	98.93	9,893.39	470.00	4.75%
10,000.0000	FEDERAL FARM CR BKS GLOBA 4.500 10/01/2019	100.00	10,000.00	98.59	9,858.65	450.00	4.56%
10,000.0000	FEDERAL HOME LOAN BANKS 4.480 01/14/2020	99.84	9,984.00	98.31	9,830.95	448.00	4.56%
Total Intermediate			80,120.90		82,351.35	4,068.00	4.94%
Long Term							
10,000.0000	NEW YORK BUILD AMERICA BONDS NY 5.199 12/01/2022	97.60	9,759.90	97.32	9,731.90	519.90	5.34%
Total Long Term			9,759.90		9,731.90	519.90	5.34%
Total Fixed Income And Related			89,880.80		92,083.25	4,587.90	4.98%

CLIENT APPRAISAL
Heritage Investors Management Corporation
1165 - BAKER/MERINE FAM FOUNDAT
December 31, 2009

Quantity	Security Description	Purchase Information		Current Market		% Market Value	Indicated Annual Income	Current Yield %
		Unit Cost	Original Cost	Unit Market	Total Market Value			
	<i>Total Investments:</i>		379,235.80		383,968.05	99.68%	8,484.52	2.22%
	<i>Accrued Income:</i>				1,217.51	0.32%		
	<i>Total Account*:</i>		<u>\$ 379,235.80</u>		<u>\$ 385,185.56</u>	<u>100.00%</u>	<u>\$ 8,484.52</u>	<u>2.22%</u>

*Weighted averages include accrued income.

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

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

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

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

Type or print File by the extended due date for filing the return. See instructions.	Name of Exempt Organization	Employer identification number
	THE BAKER/MERINE FAMILY FOUNDATION, INC.	26-0016221
	Number, street, and room or suite no. If a P.O. box, see instructions.	For IRS use only
	BRUCE W. ROBINETTE, 449-A CARLISLE DRIVE	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	HERNDON, VA 20170	

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

- ☐ Form 990 ☐ Form 990-EZ ☐ Form 990-T (sec. 401(a) or 408(a) trust) ☐ Form 1041-A ☐ Form 5227 ☐ Form 8870
☐ Form 990-BL ☒ Form 990-PF ☐ Form 990-T (trust other than above) ☐ Form 4720 ☐ Form 6069

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

THE DIRECTORS

- The books are in the care of **6618 MARYWOOD ROAD, BETHESDA, MD - 20817-2204**

Telephone No. **301-469-8997**

FAX No. ☐

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

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

4 I request an additional 3-month extension of time until **NOVEMBER 15, 2010.**

5 For calendar year **2009**, or other tax year beginning _____, and ending _____.

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

7 State in detail why you need the extension

ADDITIONAL TIME IS REQUIRED TO OBTAIN THE DETAILED ACCOUNTING & OTHER INFORMATION NECESSARY TO FILE 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	\$	40.
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	\$	40.
c	Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

Signature and Verification

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

Signature ☐

Title ☐

Date ☐