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Return of Private Foundation

OMB No 1545-0052

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

2009

Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning

, and ending

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeUse the IRS
label.
Otherwise,
print
or type.
See Specific
Instructions.

Name of foundation

JAMES AND MELANIE MCNAMARA

FAMILY FOUNDATION INC

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

2A MILLER FARM ROAD

Room/suite

City or town, state, and ZIP code

SOMERSET, NJ 08873-7300

A Employer identification number

26-1588831

B Telephone number

732-873-1419

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundation

I Fair market value of all assets at end of year

(from Part II, col (c), line 16)

\$ 1,547,748.

J Accounting method:

☒ Cash☐ Accrual☐ Other (specify)

(Part I, column (d) must be on cash basis.)

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

0.

N/A

2 Check ☒ if the foundation is not required to attach Sch. B

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

70,363.

70,363.

STATEMENT 1

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

<2,494.>

b Gross sales price for all assets on line 6a 480,491.

7 Capital gain net income (from Part IV, line 2)

0.

8 Net short-term capital gain

9 Income modifications

10a Gross sales less returns and allowances

b Less Cost of goods sold

c Gross profit or (loss)

11 Other income

RECEIVED

12 Total. Add lines 1 through 11

67,869.

70,363.

13 Compensation of officers, directors, trustees, etc.

0.

0.

0.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees

OGDEN, UT

b Accounting fees

c Other professional fees

17 Interest

18 Taxes

STMT 2

17,500.

0.

0.

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses

STMT 3

10,636.

10,636.

0.

24 Total operating and administrative expenses. Add lines 13 through 23

28,136.

10,636.

0.

25 Contributions, gifts, grants paid

75,000.

75,000.

26 Total expenses and disbursements. Add lines 24 and 25

103,136.

10,636.

75,000.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

<35,267.>

b Net investment income (if negative, enter -0-)

59,727.

c Adjusted net income (if negative, enter -0-)

N/A

SCANNED MAR 17 2010

Operating and Administrative Expenses

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**JAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC**

26-1588831

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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	120,834.		
	2 Savings and temporary cash investments		11,145.	11,145.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations STMT 4	104,380.	160,006.	178,932.
	b Investments - corporate stock STMT 5	330,937.	556,743.	572,145.
	c Investments - corporate bonds STMT 6	762,138.	675,342.	688,091.
11 Investments - land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 7	217,899.	97,686.	97,435.	
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers)	1,536,188.	1,500,922.	1,547,748.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	and complete lines 24 through 26 and lines 30 and 31			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	1,005,125.	1,005,125.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	531,064.	495,797.	
30 Total net assets or fund balances	1,536,189.	1,500,922.		
31 Total liabilities and net assets/fund balances	1,536,189.	1,500,922.		

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	1,536,189.
2 Enter amount from Part I, line 27a	2	<35,267.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,500,922.
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	1,500,922.

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 STATEMENTS				
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 480,491.		482,985.	<2,494.>	
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				
b				
c				
d				
e			<2,494.>	
2 Capital gain net income or (net capital loss)		2		<2,494.>
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	35,241.	984,081.	.035811
2007	0.	82,504.	.000000
2006			
2005			
2004			

2 Total of line 1, column (d)	2	.035811
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	.017906
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,512,595.
5 Multiply line 4 by line 3	5	27,085.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	597.
7 Add lines 5 and 6	7	27,682.
8 Enter qualifying distributions from Part XII, line 4	8	75,000.

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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	597.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		3	597.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	597.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a 2,171.	7	2,171.
b Exempt foreign organizations - tax withheld at source	6b	8	
c Tax paid with application for extension of time to file (Form 8868)	6c	9	
d Backup withholding erroneously withheld	6d	10	1,574.
7 Total credits and payments. Add lines 6a through 6d		11	0.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input checked="" type="checkbox"/> 1,574. Refunded <input checked="" type="checkbox"/>			

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. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 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) <input checked="" type="checkbox"/> NJ		
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

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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 ► <u>N/A</u>	13	X	
14	The books are in care of ► <u>A. DLUGASH C/O MARKS PANETH & SHRON</u> Telephone no. ► <u>212-503-6360</u> Located at ► <u>622 3RD AVENUE, NEW YORK, NY</u> ZIP+4 ► <u>10017</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15		N/A

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years ► _____ , _____ , _____ , _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____ , _____ , _____ , _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b

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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

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

6b

X

If "Yes" to 6b, file Form 8870

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

☐ Yes ☒ No

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

N/A

7b

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

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

(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
JAMES J. MCNAMARA JR. 2A MILLER FARM ROAD SOMERSET, NJ 08873	DIRECTOR 1.00	0.	0.	0.
MELANIE H. MCNAMARA 2A MILLER FARM ROAD SOMERSET, NJ 08873	DIRECTOR 1.00	0.	0.	0.
JAMES J. MCNAMARA SR. 2A MILLER FARM ROAD SOMERSET, NJ 08873	DIRECTOR 1.00	0.	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

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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."

[illegible]

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

C

Part IX-A

Summary of Direct Charitable Activities

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

Expenses

1	N/A	
2		
3		
4		

Part IX-B

Summary of Program-Related Investments

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		
3	All other program-related investments. See instructions.	

Total. Add lines 1 through 3

0.

Form **990-PF** (2009)

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

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	1,470,057.
b	Average of monthly cash balances	1b	65,572.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,535,629.
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	1,535,629.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	23,034.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,512,595.
6	Minimum investment return. Enter 5% of line 5	6	75,630.

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	75,630.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	597.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	597.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	75,033.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	75,033.
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	75,033.

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	75,000.
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	75,000.
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	597.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	74,403.

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				75,033.
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				
b From 2005				
c From 2006				
d From 2007				
e From 2008				15,555.
f Total of lines 3a through e	15,555.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 75,000.				
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				75,000.
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).)	33.			33.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	15,522.			
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	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	15,522.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008	15,522.			
e Excess from 2009				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) **N/A**

- 1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling ▶
- b** Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for 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					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

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

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

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

- c** Any submission deadlines:

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

**JAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC**

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<p><i>a Paid during the year</i></p> <p>ST MATTHIAS CATHOLIC CHURCH 168 J.F. KENNEDY BLVD SOMERSET, NJ 08873</p>	NONE	501(C)(3)	GENERAL SUPPORT	75,000.
Total			▶ 3a	75,000.
<p><i>b Approved for future payment</i></p> <p>NONE</p>				
Total			▶ 3b	0.

Part XVII

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

- | | | | |
|---|--------------|------------|-----------|
| 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | Yes | No |
| a Transfers from the reporting foundation to a noncharitable exempt organization of: | | | |
| (1) Cash | 1a(1) | | X |
| (2) Other assets | 1a(2) | | X |
| b Other transactions: | | | |
| (1) Sales of assets to a noncharitable exempt organization | 1b(1) | | X |
| (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | | X |
| (3) Rental of facilities, equipment, or other assets | 1b(3) | | X |
| (4) Reimbursement arrangements | 1b(4) | | X |
| (5) Loans or loan guarantees | 1b(5) | | X |
| (6) Performance of services or membership or fundraising solicitations | 1b(6) | | X |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | | 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.

Paid Preparer's Use Only Signature of officer or trustee _____ Date <u>3/9/10</u> Title <u>PRESIDENT</u>	Preparer's signature _____ Date <u>2-23-10</u> Check if self-employed <input checked="" type="checkbox"/>		Preparer's identifying number _____
	Firm's name (or yours if self-employed), address, and ZIP code MARKS PANETH & SHRON LLP 622 THIRD AVENUE NEW YORK, NY 10017		EIN <u>22-1603300</u> Phone no. <u>212-503-6360</u>

Form **990-PF** (2009)

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 300SHS ISHARE IBOXX GRADE CORP COND FUND		P	09/05/08	01/01/09
b 200SHS ISHARE IBOXX GRADE CORP COND FUND		P	10/17/08	01/09/09
c 35000SHS BANK OF OKLAHOMA OK-CD		P	09/05/08	01/30/09
d 10000SHS BILLSOUTHTELECOM INC DEBENTURE		P	05/27/08	01/15/09
e 20000SHS IBM CORP MEDIUM TERM NOTES		P	09/18/08	01/26/09
f 25000SHS SIMON PROPERTY GROUP LP NOTES		P	05/27/08	01/30/09
g 25000SHS ILLINOIS TOOL WORKS NOTES		P	09/18/08	03/02/09
h 500SHS ISHARES COHEN & STEER REALTY MJRS		P	02/03/09	04/24/09
i 300SHS ISHARES BARCLAYS TIPS BOND FUND		P	09/05/08	04/24/09
j 65000SHS OMNI NATIONAL BANK CD		P	09/05/08	04/13/09
k 10000SHS WASHINGTON MUTUAL BANK CD		P	02/03/09	06/30/09
l 50000SHS BUILDERS BANK CD		P	09/05/08	07/14/09
m 25000SHS NORTHERN ST POWER SENIOR NOTES		P	05/27/08	08/03/09
n 38000SHS PITNEY BOWES CREDIT		P	07/09/08	09/15/09
o 15000SHS DOW CHEMICAL CO		P	05/27/08	10/15/09

(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 30,595.		30,360.	235.
b 20,396.		17,200.	3,196.
c 35,000.		35,022.	<22.>
d 10,000.		10,135.	<135.>
e 20,000.		20,200.	<200.>
f 25,000.		25,024.	<24.>
g 25,000.		25,324.	<324.>
h 18,716.		18,112.	604.
i 30,309.		31,502.	<1,193.>
j 65,000.		65,162.	<162.>
k 10,000.		10,099.	<99.>
l 50,000.		50,000.	0.
m 25,000.		25,797.	<797.>
n 38,000.		39,862.	<1,862.>
o 15,000.		15,900.	<900.>

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

(i) F.M.V. 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			235.
b			3,196.
c			<22.>
d			<135.>
e			<200.>
f			<24.>
g			<324.>
h			604.
i			<1,193.>
j			<162.>
k			<99.>
l			0.
m			<797.>
n			<1,862.>
o			<900.>

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 }

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

2

3

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 146SHS CAPITAL INCOME BLDR CLASS F		P	09/05/08	11/10/09
b 20000SHS HOMESTREET BK CD		P	09/05/08	11/13/09
c 25000SHS KRAFT FOODS INC NOTES		P	05/27/08	11/12/09
d 10000SHS RATHEON CO NOTES		P	05/27/08	12/11/09
e				
f				
g				
h				
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 7,000.		8,109.	<1,109.>
b 20,000.		20,028.	<28.>
c 25,000.		25,072.	<72.>
d 10,475.		10,077.	398.
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

e			
f			
g			
h			
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			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			<1,109.>
b			<28.>
c			<72.>
d			398.
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

e			
f			
g			
h			
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	<2,494.>
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	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
WACHOVIA SECURITIES	70,363.	0.	70,363.
TOTAL TO FM 990-PF, PART I, LN 4	70,363.	0.	70,363.

FORM 990-PF	TAXES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL TAXES	17,500.	0.		0.
TO FORM 990-PF, PG 1, LN 18	17,500.	0.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADVISORY FEES	10,636.	10,636.		0.
TO FORM 990-PF, PG 1, LN 23	10,636.	10,636.		0.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	4
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
FIXED INCOME SECURITIES	X		160,006.	178,932.
TOTAL U.S. GOVERNMENT OBLIGATIONS			160,006.	178,932.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			160,006.	178,932.

FORM 990-PF	CORPORATE STOCK	STATEMENT	5
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
STOCKS & OPTIONS	201,284.	204,362.
MUTUAL FUNDS	355,459.	367,783.
TOTAL TO FORM 990-PF, PART II, LINE 10B	556,743.	572,145.

FORM 990-PF	CORPORATE BONDS	STATEMENT	6
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
FIXED INCOME SECURITIES	556,770.	565,246.
PREFERRED FIXED RATE	91,024.	94,388.
FOREIGN BONDS	27,548.	28,457.
TOTAL TO FORM 990-PF, PART II, LINE 10C	675,342.	688,091.

FORM 990-PF OTHER INVESTMENTS STATEMENT 7

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
CERTIFICATE OF DEPOSITS	COST	97,686.	97,435.
TOTAL TO FORM 990-PF, PART II, LINE 13		97,686.	97,435.



JAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC.

DECEMBER 1 - DECEMBER 31, 2009
ACCOUNT NUMBER 2340-6639

Government Bonds

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
							ACCRUED INTEREST	ANNUAL INCOME YIELD (%)
US INFL INDX NTS CPN 2.000% DUE 01/15/14 DTD 01/15/04 FC 07/15/04 Moody AAA S&P AAA DEC FACTOR 1.17003000 CUSIP 912828BW9 Acquired 12/01/08	50,000	106.40 91.04	53,202.73 53,884.73	105.9690	61,993.45	8,790.72	537.32	1,169.92 1.88

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JAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC.

DECEMBER 1 - DECEMBER 31, 2009
ACCOUNT NUMBER: 2340-6639

Fixed Income Securities

Government Bonds continued

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED		
							ACCRUED INTEREST	ANNUAL INCOME	ANNUAL YIELD (%)
US TREASURY INFLATION INDEXED CPN 1.875% DUE 07/15/15 DTD 07/15/05 FC 01/15/06 Moody AAA, S&P AAA DEC FACTOR 1.11147000 CUSIP 912828EA4 Acquired 04/24/09	50,000	113.37 102.04	56,689.24 55,625.24	105.4380	58,595.58	1,906.34	478.53	1,041.90	1.77
US INFL INDX NTS CPN 2.500% DUE 07/15/16 DTD 07/15/06 FC 01/15/07 Moody AAA, S&P AAA DEC FACTOR 1.07051000 CUSIP 912828FL9 Acquired 10/31/08	50,000	99.56 93.10	49,783.99 50,495.49	109.0000	58,342.79	8,558.80	614.53	1,338.01	2.29
Total Government Bonds	150,000		\$159,675.96 \$160,005.46		\$178,931.82	\$19,255.86	\$1,630.38	\$3,549.83	1.98

US + STATE Gov. Obligation

JAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC.

DECEMBER 31 - DECEMBER 31, 2009
ACCOUNT NUMBER-2340-6638

Stocks and Options

Stocks

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
							ANNUAL INCOME	ANNUAL YIELD (%)
GENERAL ELECTRIC COMPANY								
GE								
Acquired 07/28/08	500	28.38	14,190.00		7,565.00	- 6,625.00		
Acquired 05/13/09	500	12.89	6,448.90		7,565.00	1,116.10		
Total	1,000		\$20,638.90	15.1300	\$15,130.00	- \$5,508.90	\$400.00	2.64
ISHARES S&P U S PREFERRED STOCK								
PFF								
Acquired 05/09/08	500	44.84	22,421.00		18,350.00	- 4,071.00		
Acquired 09/05/08	334	37.10	12,391.40		12,257.80	- 133.60		
Acquired 09/05/08	166	37.05	6,150.30		6,092.20	- 58.10		
Total	1,000		\$40,962.70	36.7000	\$36,700.00	- \$4,262.70	\$2,888.00	7.87



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JAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC.

DECEMBER 1 - DECEMBER 31, 2009
ACCOUNT NUMBER 2340-6639



Stocks and Options

Stocks continued

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
							ANNUAL INCOME	ANNUAL YIELD (%)
JPMORGAN CHASE & CO ETN								
ALERIAN MLP INDEX ETN								
BASED ON WAP								
AMJ								
Acquired 09/28/09	800	24.81	19,854.40		22,864.00	3,009.60		
Acquired 09/28/09	200	24.82	4,964.00		5,716.00	752.00		
Total	1,000		\$24,818.40	28.5800	\$28,580.00	\$3,761.60	\$1,772.00	6.20
SPDR BARCLAYS CAPITAL								
INTERNATIONAL TREASURY								
BOND ETF								
BWX								
Acquired 09/05/08	300	52.74	15,822.00		17,049.00	1,227.00		
Acquired 01/05/09	200	53.35	10,670.00		11,366.00	696.00		
Total	500		\$26,492.00	56.8300	\$28,415.00	\$1,923.00	\$1,563.00	5.50
SPDR BARCLAYS CAP ET								
I/T CREDIT BOND								
ITR								
Acquired 03/26/09	1,000	29.40	29,400.00		31,672.00	2,272.00		
Acquired 09/28/09	400	32.27	12,908.00		12,668.80	- 239.20		
Acquired 09/28/09	100	32.25	3,225.00		3,167.20	- 57.80		
Acquired 11/03/09	500	31.91	15,958.00		15,836.00	- 122.00		
Total	2,000		\$61,491.00	31.6720	\$63,344.00	\$1,853.00	\$2,736.00	4.32
SPDR GOLD TRUST ETF								
GLD								
Acquired 02/06/09	300	89.60	26,881.32	107.3100	32,193.00	5,311.68	N/A	N/A
Total Stocks			\$201,284.32		\$204,362.00	\$3,077.68	\$9,359.00	4.58
Total Stocks and Options			\$201,284.32		\$204,362.00	\$3,077.68	\$9,359.00	4.58

ASSET ADVISOR

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**JAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC.**

DECEMBER 1 - DECEMBER 31, 2009
ACCOUNT NUMBER 2340-6639

Mutual Funds

Mutual fund shares are priced at net asset value. Estimated Annual Income and Yield refer to Dividends and Interest Income only, and typically do not reflect Total return.

Open End Mutual Funds

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
							ANNUAL INCOME	ANNUAL YIELD (%)
CAPITAL INCOME BLDR								
CLASS F								
CIBFX								
Acquired 07/09/08	393 86900	55.58	21,891.21		18,862.38	- 3,028.83		
Reinvestments	41 .06900	43.13	1,771.44		1,966.80	195.36		
Total	434.93800		\$23,662.65	47.8900	\$20,829.18	-\$2,833.47	\$775.92	3.73
FIDELITY ADVISOR II								
FLTG RATE HIGH INCOME FD								
CL I								
FFRIX								
Acquired 05/28/08	3,711 55900	9.43	35,000.00		34,925.73	- 74.27		
Acquired 07/07/08	1,600 85400	9.37	15,000.00		15,064.05	64.05		
Reinvestments	338 40700	8.61	2,916.89		3,184.43	267.54		
Total	5,650.82000		\$52,916.89	9.4100	\$53,174.21	\$257.32	\$1,610.48	3.03
FRANKLIN INVS SECS TR								
ADJ U S GOVT SECS FD								
CL A								
Acquired 08/03/09	5,574 13600	8.97	50,000.00		50,055.69	55.69		
Acquired 09/28/09	2,783 96400	8.98	25,000.00		25,000.02	0.02		
Reinvestments	63 08600	8.97	566.03		566.54	0.51		
Total	8,421.18600		\$75,566.03	8.9800	\$75,622.25	\$56.22	\$2,214.77	2.93
GOLDMAN SACHS TR FINL								
SQUARE MONEY MKT FD								
INSTL CLASS								
FSMXX								
Acquired 10/20/08	50,000	1.00	50,000.00		50,000.00	0.00		
Reinvestments	382 05000	1.00	382.05		382.05	0.00		
Total	50,382.05000		\$50,382.05	1.0000	\$50,382.05	\$0.00	\$25.19	0.05
LOOMIS SAYLES FDS II								
STRATEGIC INCOME FD								
CL A								
NEFZX								
Acquired 01/09/09	7,339 45000	10.90	80,000.00		101,284.34	21,284.34		
Reinvestments	484 02500	12.03	5,824.34		6,679.61	855.27		
Total	7,823.47500		\$85,824.34	13.8000	\$107,963.95	\$22,139.61	\$6,016.25	5.57

ASSET ADVISOR



ADVISORS

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JAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC.

DECEMBER 1 - DECEMBER 31, 2009
ACCOUNT NUMBER 2340-8639

Mutual Funds

Open End Mutual Funds continued

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
							ANNUAL INCOME	ANNUAL YIELD (%)
HIGHBRIDGE STATISTICAL NEUTRAL SL FD HSKSX								
Acquired 06/20/08	1,852	99600	30,000.00		29,166.14	- 833.86		
Acquired 01/09/09	599	88000	10,000.00		9,442.11	- 557.89		
Acquired 09/28/09	619	96300	10,000.00		9,758.23	- 241.77		
Reinvestments	4	07700	66.94		64.17	- 2.77		
Total	3,076	.91600	\$50,066.94	15.7400	\$48,430.65	-\$1,636.29	\$101.53	0.21
Total Open End Mutual Funds			\$338,418.90		\$356,402.29	\$17,983.39	\$10,744.14	3.01

Closed End Mutual Funds

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
							ANNUAL INCOME	ANNUAL YIELD (%)
BLACKROCK CREDIT ALLOC INCOME TRUST IV BTZ								
Acquired 05/27/08	100	17.03	1,703.64		1,138.00	- 565.64		
Acquired 05/27/08	900	17.04	15,336.00		10,242.00	- 5,094.00		
Total	1,000		\$17,039.64	11.3800	\$11,380.00	-\$5,659.64	\$1,200.00	10.54
Total Closed End Mutual Funds			\$17,039.64		\$11,380.00	-\$5,659.64	\$1,200.00	10.54
Total Mutual Funds			\$355,458.54		\$367,782.29	\$12,323.75	\$11,944.14	3.25

Corp. Stock
+ 201284.32 =
556,742.86
572,144.29

**JAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC.**

DECEMBER 1 - DECEMBER 31, 2009
ACCOUNT NUMBER 2340-6639

Fixed Income Securities

Corporate and municipal bonds and other fixed income securities are priced by a computerized pricing service or, for less actively traded issues, by utilizing a yield-based matrix system to arrive at an estimated market value

Corporate Bonds

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED		
							ACCRUED INTEREST	ANNUAL INCOME	ANNUAL YIELD (%)
COMCAST CORP									
NOTES									
CPN 5.850% DUE 01/15/10									
DTD 01/10/03 FC 07/15/03									
Moody BAA1, S&P BBB+									
CUSIP 20030NAA9									
Acquired 05/27/08	25,000	102.56	25,641.00	100.1860	25,046.50	- 594.50	674.38	1,462.50	5.83
KEYSPAN GAS EAST									
NOTES									
CPN 7.875% DUE 02/01/10									
DTD 02/01/00 FC 08/01/00									
Moody A3, S&P A									
CUSIP 49337EAA8									
Acquired 07/07/08	40,000	105.66	42,267.20	100.5320	40,212.80	- 2,054.40	1,312.50	3,150.00	7.83
NATIONSBANK CORP									
SUB NOTES									
NON CALL LIFE									
CPN 6.600% DUE 05/15/10									
DTD 05/04/98 FC 11/15/98									
Moody A3, S&P A-									
CUSIP 638585BH1									
Acquired 09/08/08	15,000	102.86	15,430.20	101.9430	15,291.45	- 138.75	126.50	990.00	6.47
PROGRESS ENERGY FLORIDA									
1ST MORTGAGE									
CALLABLE									
CPN 4.500% DUE 06/01/10									
DTD 05/16/05 FC 12/01/05									
Moody A1, S&P A-									
CUSIP 341099CE7									
Acquired 01/02/09	35,000	101.25	35,437.50	101.3840	35,484.40	46.90	131.25	1,575.00	4.43



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**JAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC.**DECEMBER 1 - DECEMBER 31, 2009
ACCOUNT NUMBER: 2340-6639**Fixed Income Securities**
Corporate Bonds continued

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ACCRUED INTEREST	ESTIMATED	
								ANNUAL INCOME	ANNUAL YIELD (%)
WM WRIGLEY JR CO NOTES CALLABLE CPN 4.300% DUE 07/15/10 DTD 07/14/05 FC 01/15/06 Moody WR, S&P NR CUSIP 982526AA3 Acquired 07/29/08	25,000	100.02	25,006.25	101.3520	25,338.00	331.75	495.69	1,075.00	4.24
AXA FINANCIAL INC SENIOR NOTES CALLABLE CPN 7.750% DUE 08/01/10 DTD 07/28/00 FC 02/01/01 Moody A2, S&P A+ CUSIP 002451AA0 Acquired 01/02/09	25,000	102.57	25,643.25	103.6980	25,924.50	281.25	807.29	1,937.50	7.47
CONS EDISON CO NY INC DEBENTURES SERIES B CPN 7.500% DUE 09/01/10 DTD 08/28/00 FC 03/01/01 Moody A3, S&P A- CUSIP 209111DJ9 Acquired 10/17/08	25,000	104.28	26,070.25	104.0890	26,022.25	-48.00	625.00	1,875.00	7.20
AMERICAN EXPRESS CREDIT MEDIUM TERM NOTES CPN 5.000% DUE 12/02/10 DTD 12/02/05 FC 06/02/06 Moody A2, S&P BBB+ CUSIP 0258M0BY4 Acquired 10/17/08	10,000	96.17 91.67	9,617.60 9,167.10	103.2950	10,329.50	711.90	40.28	500.00	4.84
NATIONAL RURAL UTIL COOP INTERNOTES SEMI-ANNUAL PAY CPN 5.100% DUE 12/15/10 DTD 09/27/07 FC 03/15/08 Moody A2, S&P A CUSIP 63743FGV2 Acquired 05/27/08	25,000	101.73	25,433.75	103.7260	25,931.50	497.75	375.42	1,275.00	4.91

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JAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC.

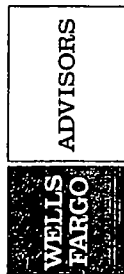
DECEMBER 1 - DECEMBER 31, 2009
ACCOUNT NUMBER 2340-6639

Fixed Income Securities

Corporate Bonds continued

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED		
							ACCRUED INTEREST	ANNUAL INCOME	ANNUAL YIELD (%)
CAMPBELL SOUP CO NOTES CALLABLE CPN 6 750% DUE 02/15/11 DTD 02/21/01 FC 08/15/01 Moody A2, S&P A CUSIP 134429AM1 Acquired 05/27/08	25,000	106 78	26,695 00	106 3100	26,577 50	- 117 50	637 50	1,687 50	6 34
DOVER CORP NOTES CALLABLE CPN 6 500% DUE 02/15/11 DTD 02/12/01 FC 08/15/01 Moody A2, S&P A CUSIP 260003AD0 Acquired 05/27/08	25,000	105 26	26,316 50	105 7400	26,435 00	118 50	613 89	1,625 00	6 14
ANHEUSER-BUSCH COS INC NOTES CPN 6 000% DUE 04/15/11 DTD 04/16/01 FC 10/15/01 Moody BAA2, S&P BBB+ CUSIP 035229CH4 Acquired 05/27/08	25,000	105 00	26,252 25	105 8650	26,466 25	214 00	316 67	1,500 00	5 66
TOYOTA MOTOR CREDIT CORP SENIOR NOTES CPN 5 450% DUE 05/18/11 DTD 05/18/06 FC 11/18/06 Moody AA1, S&P AA CUSIP 892332AQ0 Acquired 10/17/08	25,000	102 42	25,605 25	105 5700	26,392 50	787 25	162 74	1,362 50	5 16
FLORIDA POWER CORP 1ST MTG BOND CALL @ MAKE WHOLE +30BP CPN 6 650% DUE 07/15/11 DTD 07/18/01 FC 01/15/02 Moody A1, S&P A- CUSIP 341098Z1 Acquired 05/27/08	25,000	106 85	26,714 25	106 8810	26,720 25	6 00	766 60	1,662 50	6 22

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**JAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC.**

DECEMBER 1 - DECEMBER 31, 2009
ACCOUNT NUMBER 2340-6639

Fixed Income Securities

Corporate Bonds continued

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
							ACCRUED INTEREST	ANNUAL INCOME YIELD (%)
CONAGRA FOODS INC NOTES CALLABLE CPN 6.750% DUE 09/15/11 DTD 09/10/01 FC 03/15/02 Moody BAA2, S&P BBB CUSIP 205887BA9 Acquired 05/27/08	10,000	105.66	10,566.30	108.1810	10,818.10	251.80	198.75	6.23
VERIZON PENNSYLVANIA GLOBAL NOTES CALLABLE CPN 5.650% DUE 11/15/11 DTD 11/13/01 FC 05/15/02 Moody A3, S&P A CUSIP 92344TAA6 Acquired 05/27/08	25,000	102.00	25,500.25	106.4150	26,603.75	1,103.50	180.49	5.30
CREDIT SUISSE FB USA INC GLOBAL NOTES CALLABLE CPN 6.500% DUE 01/15/12 DTD 01/11/02 FC 07/15/02 Moody AA1, S&P A+ CUSIP 22541LAC7 Acquired 09/08/08	20,000	103.96	20,793.80	109.0270	21,805.40	1,011.60	599.44	5.96
DAYTON HUDSON CORP DEBS NON CALL LIFE CPN 8.600% DUE 01/15/12 DTD 01/15/92 FC 07/15/92 Moody A2, S&P A+ CUSIP 239753BK1 Acquired 09/08/08	18,000	110.62	19,911.96	112.2950	20,213.10	301.14	713.80	7.65

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**JAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC.**

DECEMBER 1 - DECEMBER 31, 2009
ACCOUNT NUMBER 2340-6639

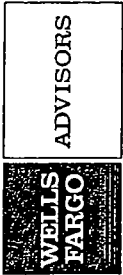
Fixed Income Securities

Corporate Bonds continued

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED		
							ACCRUED INTEREST	ANNUAL INCOME	ANNUAL YIELD (%)
DUKE ENERGY CORP NOTES SEMI-ANNUAL PAY CPN 6.250% DUE 01/15/12 DTD 01/14/02 FC 07/15/02 Moody BAA2, S&P A- CUSIP 264399DW3 Acquired 09/08/08	15,000	105.27	15,791.70	108.3130	16,246.95	455.25	432.29	937.50	5.77
ABBOTT LABORATORIES NOTES CALLABLE CPN 5.150% DUE 11/30/12 DTD 11/09/07 FC 05/30/08 Moody A1, S&P AA CUSIP 002819AA8 Acquired 05/27/08	25,000	103.77	25,944.75	109.6250	27,406.25	1,461.50	N/A	1,287.50	4.69
E.I. DU PONT DE NEMOURS NOTES CPN 5.000% DUE 01/15/13 DTD 12/03/07 FC 07/15/08 Moody A2, S&P A CUSIP 263534BS7 Acquired 09/08/08	25,000	101.47	25,368.25	107.2170	26,804.25	1,436.00	576.39	1,250.00	4.66
BOEING CO GLOBAL NOTE CALLABLE CPN 5.125% DUE 02/15/13 DTD 02/11/03 FC 08/15/03 Moody A2, S&P A CUSIP 097023AT2 Acquired 05/27/08	15,000	103.33	15,500.70	106.9690	16,045.35	544.65	290.42	768.75	4.79



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JAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC.DECEMBER 1 - DECEMBER 31, 2009
ACCOUNT NUMBER 2340-6639

Fixed Income Securities

Corporate Bonds continued

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED		
							ACCRUED INTEREST	ANNUAL INCOME	ANNUAL YIELD (%)
CATERPILLAR FIN SERV CRP POWER NOTES CALLABLE SEMI ANNUAL PAY CPN 5.400% DUE 03/15/13 DTD 03/16/06 FC 09/15/06 CALL 03/15/10 @ 100.000 Moody A2, S&P A CUSIP 14911QW98 Acquired 09/08/08	10,000	100.00	10,000.00	100.3120	10,031.20	31.20	159.00	540.00	5.38
WYETH NOTES - CPN LINKED TO WYETH CREDIT RATING CPN 5.500% DUE 03/15/13 DTD 02/14/03 FC 09/15/03 Moody A1, S&P AA CUSIP 983024AA8 Acquired 05/27/08	25,000	102.85	25,712.50	108.3960	27,099.00	1,386.50	404.86	1,375.00	5.07
Total Corporate Bonds	538,000		\$557,220.46 \$556,769.96		\$565,245.75	\$8,025.29	\$10,641.15	\$32,771.75	5.80

Preferreds/Fixed Rate Cap Securities

DESCRIPTION	QUANTITY	ADJ PRICE/		ADJ COST/	CURRENT	CURRENT	UNREALIZED	ESTIMATED	
		ORIG PRICE	ORIG PRICE	ORIG COST	PRICE	MARKET VALUE	GAIN/LOSS	ANNUAL INCOME	ANNUAL YIELD (%)
AEGON N V FLOATING RAT									
CUM PERPETUAL PFD									
CALL STARTING 12/15/10									
AEB									
Acquired 05/06/08	1,000	20 32		20,320 00		17,045.00	- 3,275.00		
Acquired 11/25/09	300	14 99		4,499 97		5,113 50	613 53		

ASSET ADVISOR

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**JAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC.**

DECEMBER 1 - DECEMBER 31, 2009
ACCOUNT NUMBER 2340-6639

Preferreds/Fixed Rate Cap Securities

DESCRIPTION Acquired 11/25/09	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
							ANNUAL INCOME	ANNUAL YIELD (%)
Total	1,500	14.98	\$27,816.97	17.0450	\$25,567.50	-\$2,249.47	\$1,533.00	6.00
GS FLT RT NON-CUM PFD PERPETUAL CALLABLE 4/25/10 GSA								
Acquired 10/22/09	542	21.23	11,509.37		11,886.06	376.69		
Acquired 10/22/09	458	21.25	9,732.50		10,043.94	311.44		
Acquired 11/17/09	500	20.40	10,203.00		10,965.00	762.00		
Total	1,500		\$31,444.87	21.9300	\$32,895.00	\$1,450.13	\$1,437.00	4.37
METLIFE FLTG RATE PERPETUAL PFD CALLABLE 6/15/10 META								
Acquired 05/06/08	1,000	21.19	21,190.00		23,950.00	2,760.00		
Acquired 11/17/09	500	21.14	10,572.50		11,975.00	1,402.50		
Total	1,500		\$31,762.50	23.9500	\$35,925.00	\$4,162.50	\$1,516.50	4.22
Total Preferreds/Fixed Rate Cap Securities			\$91,024.34		\$94,387.50	\$3,363.16	\$4,486.50	4.75

WELLS
FARGOJAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC.

ADVISORS

Foreign Bonds

Foreign Fixed Income securities may be denominated in currencies other than US dollars. Due to currency fluctuations, displayed figures for "Estimated Accrued Interest," "Estimated Annual Income" and "Estimated Annual Yield" may not reflect current exchange rates. Please contact Your Financial Advisor if you own a Foreign Fixed Income security that is denominated in other than US dollars and have additional questions.

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED		
							ACCRUED INTEREST	ANNUAL INCOME	ANNUAL YIELD (%)
PHILLIPS ELECTRONICS NV DEBENTURE NON CALL LIFE CPN 7.250% DUE 08/15/13 DTD 08/15/93 FC 02/15/94 Moody A3, S&P A- CUSIP 718448AB9 Acquired 09/08/08	25,000	110.19	27,547.75	113.8260	28,456.50	908.75	684.72	1,812.50	6.36
Total Foreign Bonds	25,000		\$27,547.75		\$28,456.50	\$908.75	\$684.72	\$1,812.50	6.37

5-63-245.75
94367.50

686089.75

Corp Bonds + 556769.96
Preferred + 91024.34

675,342.05

Total Investment 7 Corp Bonds

Certificates of Deposit

Long-term certificates of deposit (maturity beyond one year from date of issue) are priced using a market value pricing model

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
							ACCRUED INTEREST	ANNUAL INCOME YIELD (%)
MIDFIRST BANK CD OK CITY OK ACT/365 FDIC INSURED CPN 1.300% DUE 01/11/10 DTD 02/11/09 FC 01/11/10 CUSIP 59740MJN3 Acquired 02/03/09	50,000	100.00	50,000.00	100.0360	50,018.00	18.00	575.21	1.29



ASSET ADVISOR



JAMES AND MELANIE MCNAMARA
FAMILY FOUNDATION INC.

DECEMBER 1 - DECEMBER 31, 2009
ACCOUNT NUMBER: 2340-6639

Fixed Income Securities

Certificates of Deposit continued

Long-term certificates of deposit (maturity beyond one year from date of issue) are priced using a market value pricing model

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ACCRUED INTEREST	ESTIMATED	
								ANNUAL INCOME	ANNUAL YIELD (%)
BOSTON PRIVATE BK&TR CD BOSTON MA ACT/365 FDIC INSURED CPN 5.000% DUE 03/16/10 DTD 03/16/07 FC 09/16/07 CUSIP 101120BA0 Acquired 09/05/08	47,000	101.46	47,686.20	100.8870	47,416.89	- 269.31	682.47	2,350.00	4.95
Total Certificates of Deposit	97,000		\$97,686.20		\$97,434.89	-\$251.31	\$1,257.68	\$3,000.00	3.08

INVESTMENT OTHER

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

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

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

Part II	Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).	
Type or print File by the extended due date for filing the return. See instructions.	Name of Exempt Organization JAMES AND MELANIE MCNAMARA FAMILY FOUNDATION INC	Employer identification number 26-1588831
	Number, street, and room or suite no. If a P.O. box, see instructions 2A MILLER FARM ROAD	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. SOMERSET, NJ 08873-7300	

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.

A. DLUGASH C/O MARKS PANETH & SHRON

- The books are in the care of **622 3RD AVENUE - NEW YORK, NY 10017**

Telephone No **212-503-6360**

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 _____

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	\$	597.
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	\$	2,171.
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 ☐