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

2009

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

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

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation ROBERT AND HELEN HADDAD FOUNDATION, INC		A Employer identification number 30-0127786
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite 3460 COMMERCE DRIVE		B Telephone number 812-376-9301
	City or town, state, and ZIP code COLUMBUS, IN 47201		C If exemption application is pending, 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		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 3,233,288. (Part I, column (d) must be on cash basis.)		J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	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 ☐

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)
Revenue	1 Contributions, gifts, grants, etc., received	461,574.		N/A	
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	11,576.	11,576.		STATEMENT 1
	4 Dividends and interest from securities	48,714.	48,714.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-120,207.			
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11	401,657.	60,290.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees STMT 3	25,317.	0.		25,317.
	b Accounting fees STMT 4	1,600.	1,600.		0.
	c Other professional fees STMT 5	15,655.	15,655.		0.
	17 Interest				
	18 Taxes STMT 6	-2,187.	-2,187.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 7	4,459.	134.		4,325.
	24 Total operating and administrative expenses. Add lines 13 through 23	44,844.	15,202.		29,642.
	25 Contributions, gifts, grants paid	118,150.			118,150.
26 Total expenses and disbursements. Add lines 24 and 25	162,994.	15,202.		147,792.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	238,663.				
b Net investment income (if negative, enter -0-)		45,088.			
c Adjusted net income (if negative, enter -0-)			N/A		

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Part II Balance Sheets		Beginning of year (a) Book Value	End of year	
			(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	830.	1,323.	1,323.
	2 Savings and temporary cash investments	205,594.	174,970.	179,250.
	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			
	b Investments - corporate stock			
	c Investments - corporate bonds STMT 9	160,768.	165,118.	134,418.
	11 Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 10	2,580,618.	2,845,062.	2,918,297.
	14 Land, buildings, and equipment: basis ▶ Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	2,947,810.	3,186,473.	3,233,288.
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 ▶ ☐ 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 ▶ ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	2,947,810.	3,186,473.	
	30 Total net assets or fund balances	2,947,810.	3,186,473.	
	31 Total liabilities and net assets/fund balances	2,947,810.	3,186,473.	

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	2,947,810.
2 Enter amount from Part I, line 27a	2	238,663.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	3,186,473.
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	3,186,473.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SEE ATTACHED SCHEDULE			
b SEE ATTACHED SCHEDULE			
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			6,351.
b			-126,558.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) 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			6,351.
b			-126,558.
c			
d			
e			

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	-120,207.
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	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		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	152,545.	2,469,633.	.061768
2007	91,757.	2,343,320.	.039157
2006	95,050.	1,828,721.	.051976
2005	74,556.	1,764,466.	.042254
2004	59,884.	1,124,187.	.053269

2 Total of line 1, column (d)	2	.248424
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	.049685
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	2,494,773.
5 Multiply line 4 by line 3	5	123,953.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	451.
7 Add lines 5 and 6	7	124,404.
8 Enter qualifying distributions from Part XII, line 4	8	147,792.

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)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	451.
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	451.
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	451.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	400.	
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	400.	
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	51.	
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) ☒ IN		
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 ► WWW.THEHADDADFOUNDATION.ORG	13	X	
14	The books are in care of ► FIRST FINANCIAL BANK, N.A. Telephone no. ► 812-372-0111 Located at ► 500 WASHINGTON STREET, COLUMBUS, IN ZIP+4 ► 47201			
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? ☐ Yes ☒ No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ 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.) ☐ 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 ☐ 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? ☐ Yes ☒ No	1c	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? ☐ Yes ☒ 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.) ☐ Yes ☒ No	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. ☐ Yes ☒ No		
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.) ☐ Yes ☒ No	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? ☐ Yes ☒ No	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009? ☐ Yes ☒ No	4b	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**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
SEE STATEMENT 11		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 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	2,482,351.
b	Average of monthly cash balances	1b	50,413.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	2,532,764.
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	2,532,764.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	37,991.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,494,773.
6	Minimum investment return. Enter 5% of line 5	6	124,739.

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	124,739.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	451.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	451.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	124,288.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	124,288.
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	124,288.

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	147,792.
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	147,792.
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	451.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	147,341.

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.

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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				124,288.
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				5,808.
f Total of lines 3a through e	5,808.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$				147,792.
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				124,288.
e Remaining amount distributed out of corpus	23,504.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	29,312.			
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	29,312.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				5,808.
e Excess from 2009				23,504.

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)				
a <i>Paid during the year</i> SEE ATTACHED FOOTNOTE VARIOUS VARIOUS	NONE	CHARITABLE		118,150.
Total			▶ 3a	118,150.
b <i>Approved for future payment</i> NONE VARIOUS VARIOUS	NONE			
Total			▶ 3b	0.

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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

ROBERT AND HELEN HADDAD FOUNDATION, INC

30-0127786

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

ROBERT AND HELEN HADDAD FOUNDATION, INC

30-0127786

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	ROBERT W. HADDAD & HELEN HADDAD IRREVOCABLE CHARITABLE LEAD 3460 COMMERCE DR. COLUMBUS, IN 47201	\$ 461,574.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
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			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

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

SOURCE	AMOUNT
VARIOUS	11,576.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	11,576.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
VARIOUS	48,714.	0.	48,714.
TOTAL TO FM 990-PF, PART I, LN 4	48,714.	0.	48,714.

FORM 990-PF LEGAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	25,317.	0.		25,317.
TO FM 990-PF, PG 1, LN 16A	25,317.	0.		25,317.

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	1,600.	1,600.		0.
TO FORM 990-PF, PG 1, LN 16B	1,600.	1,600.		0.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT ADVISORY FEES	15,655.	15,655.		0.
TO FORM 990-PF, PG 1, LN 16C	15,655.	15,655.		0.

FORM 990-PF	TAXES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAXES	-2,187.	-2,187.		0.
TO FORM 990-PF, PG 1, LN 18	-2,187.	-2,187.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
SUPPLIES	77.	77.		0.
WEBSITE	4,325.	0.		4,325.
MISCELLANEOUS	57.	57.		0.
TO FORM 990-PF, PG 1, LN 23	4,459.	134.		4,325.

	FOOTNOTES	STATEMENT	8
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GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR:

GLEANERS FOOD BANK OF INDIANA, INC.	15,000.
COLUMBUS ROTARY CLUB	3,000.
AMERICAN RED CROSS	1,000.
CHILD ABUSE PREVENTION COUNCIL OF BARTHOLOMEW COUNTY, INC.	2,000.
COMMUNITY FIRST INITIATIVE	6,000.
INDIANAPOLIS MUSEUM OF CONTEMPORARY ART	20,000.
ROBBINS FOUNDATION, INC.	5,000.
ALTERNATIVES INCORPORATED OF MADISON COUNTY	11,000.

ROBERT AND HELEN HADDAD FOUNDATION, INC

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COLUMBUS PARK FOUNDATION	15,000.
COLUMBUS REGIONAL HOSPITAL	1,000.
STARFISH INITIATIVE	10,000.
ACCREDITATION BOARD FOR ENGINEERING	1,900.
INDIANAPOLIS MARION COUNTY PUBLIC LIBRARY	3,250.
JUST FRIENDS ADULT DAY CARE SERVICES	20,000.
SCHOOL ON WHEELS CORP	3,000.
WINGS YOUTH CENTER, INC.	1,000.

TOTAL	118,150.
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FORM 990-PF	CORPORATE BONDS	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
VARIOUS CORPORATE BONDS	165,118.	134,418.
TOTAL TO FORM 990-PF, PART II, LINE 10C	165,118.	134,418.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	10
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
VARIOUS OTHER INVESTMENTS	COST	2,845,062.	2,918,297.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,845,062.	2,918,297.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	11
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
ROBERT W. HADDAD, JR. 14415 CHERRY TREE ROAD CARMEL, IN 46033	PRESIDENT 2.00	0.	0.	0.
TAMARA L BURTON 1016 HUMMINGBIRD LANE COLUMBUS, IN 47203	VICE PRESIDENT 2.00	0.	0.	0.
HELEN HADDAD 4345 RIVERSIDE DRIVE COLUMBUS, IN 47201	SECRETARY 2.00	0.	0.	0.
ROGER FROMER 6080 SHERIDAN DRIVE COLUMBUS, IN 47203	TREASURER 2.00	0.	0.	0.
ROBERT W. HADDAD, SR. 4345 RIVERSIDE DRIVE COLUMBUS, IN 47201	DIRECTOR 2.00	0.	0.	0.

ROBERT AND HELEN HADDAD FOUNDATION, INC

30-0127786

TRACY L. HADDAD 14415 CHERRY TREE ROAD CARMEL, IN 46033	DIRECTOR 2.00	0.	0.	0.
HAYDEN L. H. BISHOP 510 WEST 63RD STREET INDIANAPOLIS, IN 46260	DIRECTOR 2.00	0.	0.	0.
KEVIN ALERDING ONE AMERICAN SQUARE, SUITE 3100 INDIANAPOLIS, IN 46282	DIRECTOR 2.00	0.	0.	0.
TAMARA L. BURTON 1016 HUMMINGBIRD LANE COLUMBUS, IN 47203	DIRECTOR 2.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 12

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

ROGER FROMER
3460 COMMERCE DRIVE
COLUMBUS, IN 47201

TELEPHONE NUMBER

812-376-9301

FORM AND CONTENT OF APPLICATIONS

GRANT APPLICATIONS CAN BE SUBMITTED IN WRITING OR VIA THE FOUNDATION'S WEBSITE. THE WRITTEN APPLICATIONS ARE TO BE SUBMITTED TO ROGER FROMER, AT 3460 COMMERCE DRIVE, COLUMBUS, IN 47201. A COPY OF EACH APPLICANT'S FEDERAL DETERMENATION LETTER WHICH STATES THAT THE ORIGANIZATION IS A CODE SECTION 501(C)(3) ORGANIZATION, SHOULD BE SUBMITTED, ALSO.

ANY SUBMISSION DEADLINES

PRIOR TO QUARTERLY MEETINGS.

RESTRICTIONS AND LIMITATIONS ON AWARDS

NO RESTRICTIONS OTHER THAN GENERAL PURPOSE OUTLINED AS FOLLOWS. THE FOUNDATION IS OPERATED SOLELY TO PROVIDE FUNDING FOR CHARITABLE, RELIGIOUS, SCIENTIFIC, LITERARY, AND EDUCATIONAL PURPOSES, ALSO TESTING FOR PUBLIC SAFETY AS DESCRIBED IN CODE SECTION 501 (C) (3). THE FOUNDATION WILL ACCOMPLISH SUCH PURPOSE BY MAKING GRANTS AND CONTRIBUTIONS TO QUALIFIED CHARITABLE ORGANIZATIONS TO SUPPORT SUCH ACTIVITIES. THE FOUNDATION'S GRANT-MAKING ACTIVITIES WILL BE CONDUCTED ON AN ONGOING BASIS BY MAKING GRANTS TO ORGANIZATIONS THE FOUNDATION'S BOARD OF DIRECTORS FEELS ARE IN NEED OF FUNDS.

SCHEDULE D

 IUB50296600 (HADDAD, ROBERT ANF N FOUNDATION) YR END 12/31/09 TAXPAYER ID 3 08 7786 TX 0 137
 OFFICER# 137 MARY ANN NUNN

PAGE 1

DATE	SHR/PV	DESCRIPTION	ACQUIRED	SOLD/RECO	SALE PRICE	BASIS	NET S.T.	NET L.T.
8/31/09	99000.000	SOLD ANCHOR BK NATL MN CD 3.750% 99,000 DOLLARS AT 100 %	8/25/09 6/24/08	8/31/09	99000.00	99000.00	0.00	0.00
2/ 9/09	60000.000	SOLD CITIGROUP INC 3.625% 60,000 PAR VALUE AT 100 %	2/09/09 5/6/04	2/9/09	60000.00	60000.00	0.00	0.00
9/15/09	35000.000	SOLD PROCTER & GAMBLE CO 6.875% 35,000 PAR VALUE AT 100 %	9/15/09 1/21/04	9/15/09	35000.00	41915.86	0.00	-6915.86
1/15/09	35000.000	SOLD SLM CORP MTN 4.000% 35,000 PAR VALUE AT 100 %	1/15/09 1/13/04	1/15/09	35000.00	36194.09	0.00	-1194.09
8/14/09	8989.259	SOLD BRANDYWINE BLUE FUND ACQUIRED 10/06/06 THROUGH 12/01/08 8,989.259 UNITS AT \$19.87	VARIOUS	8/13/09	178616.57	256227.44	4259.96	-81870.83
*****	573.484	GAIN/LOSS LT: -6761.37	10/ 6/06		11395.13	18156.50		
*****	787.898	GAIN/LOSS LT: -9344.47	10/11/06		15655.53	25000.00		
*****	619.963	GAIN/LOSS LT: -7681.34	10/13/06		12318.66	20000.00		
*****	154.321	GAIN/LOSS LT: -1933.64	10/16/06		3066.36	5000.00		
*****	361.275	GAIN/LOSS LT: -4284.73	10/26/06		7178.53	11463.26		
*****	930.521	GAIN/LOSS LT: -11510.55	12/ 6/06		18489.45	30000.00		
*****	625.978	GAIN/LOSS LT: -7561.82	12/12/06		12438.18	20000.00		
*****	682.171	GAIN/LOSS LT: -8445.26	12/14/06		13554.74	22000.00		
*****	28.407	GAIN/LOSS LT: -338.88	12/28/06		564.45	903.33		
*****	1288.330	GAIN/LOSS LT: -20767.89	10/30/07		25599.12	46367.01		
*****	206.163	GAIN/LOSS LT: -3240.88	12/28/07		4096.46	7337.34		
*****	2730.748	GAIN/LOSS ST: 4259.96	12/ 1/08		54259.96	50000.00		
9/16/09	1001.588	SOLD LONGLEAF PARTNERS FUND #133 ACQUIRED 12/26/07 THROUGH 11/06/08 1,001.588 UNITS AT \$22.93	VARIOUS	9/15/09	22966.41	32902.99	428.29	-10364.87
*****	939.697	GAIN/LOSS LT: -10364.87	12/26/07		21547.25	31912.12		
*****	61.891	GAIN/LOSS ST: 428.29	11/ 6/08		1419.16	990.87		
11/19/09	1558.603	SOLD ROYCE PREMIER FD #265 - INV CLASS ACQUIRED 10/03/06 THROUGH 10/05/06 1,558.603 UNITS AT \$16.04	VARIOUS	11/18/09	25000.00	26504.78	0.00	-1504.78
*****	1472.320	GAIN/LOSS LT: -1383.98	10/ 3/06		23616.02	25000.00		
*****	86.283	GAIN/LOSS LT: -120.80	10/ 5/06		1383.98	1504.78		
11/20/09	527.319	SOLD ROYCE PREMIER FD #265 - INV CLASS 527.319 UNITS AT \$15.74	10/5/06	11/19/09	8300.00	9196.44	0.00	-896.44
11/19/09	1812.908	SOLD SEI SIMT SMALL CAP VALUE CL A 58 1,812.908 UNITS AT \$13.79	4/23/08	11/18/09	25000.00	29550.40	0.00	-4550.40
11/20/09	408.012	SOLD SEI SIMT SMALL CAP VALUE CL A 58 408.012 UNITS AT \$13.48	4/23/08	11/19/09	5500.00	6650.60	0.00	-1150.60
11/19/09	874.738	SOLD SOUND SHORE FUND 874.738 UNITS AT \$28.58	10/3/06	11/18/09	25000.00	34727.09	0.00	-9727.09

SCHEDULE D

 # 1UB50296600 (HADDAD, ROBERT ANI EN FOUNDATION) YR END 12/31/09 TAXPAYER ID 3 7786 TX 0 137
 OFFICER# 137 MARY ANN NUNN

PAGE 2

DATE	SHR/PV	DESCRIPTION	ACQUIRED	SOLD/RECD	SALE PRICE	BASIS	NET S.T.	NET L.T.
11/20/09	490.579	SOLD SOUND SHORE FUND 490.579 UNITS AT \$28.13	10/3/06	11/19/09	13800.00	19475.99	0.00	-5675.99
11/20/09	96.797	SOLD FIDELITY CONTRAFUND 96.797 UNITS AT \$56.82	12/24/08	11/19/09	5500.00	4252.29	1247.71	0.00
11/19/09	1421.212	SOLD HARBOR INTERNATIONAL FUND #11 ACQUIRED 10/03/06 THROUGH 10/05/06 1,421.212 UNITS AT \$56.29	VARIOUS	11/18/09	80000.00	81989.56	0.00	-1989.56
*****	872.600	GAIN/LOSS LT: -881.36	10/ 3/06		49118.64	50000.00		
*****	548.612	GAIN/LOSS LT: -1108.20	10/ 5/06		30881.36	31989.56		
7/ 9/09	2431.907	SOLD VANGUARD S/T CORPORATE-ADM #539 ACQUIRED 12/26/07 THROUGH 4/23/08 2,431.907 UNITS AT \$10.28	VARIOUS	7/8/09	25000.00	25717.21	0.00	-717.21
*****	398.278	GAIN/LOSS LT: -127.45	12/26/07		4094.30	4221.75		
*****	2033.629	GAIN/LOSS LT: -589.76	4/23/08		20905.70	21495.46		
12/21/09	4350.459	RECD FIDELITY CONTRAFUND CAPITAL GAINS DISTRIBUTION		12/18/09	0.00	0.00	369.79	0.00
12/29/09	26143.410	RECD BAIRD AGGREGATE BD FD CAPITAL GAINS DISTRIBUTION		12/28/09	0.00	0.00	45.49	0.00
							<u>6351.24</u>	<u>-126557.72</u>