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Form 990-PF

Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

OMB No 1545-0052

2009Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning

, and ending

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation MIAMI VALLEY RESEARCH FOUNDATION		A Employer identification number 31-0996772
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite 3155 RESEARCH BLVD		B Telephone number 937-252-5906
	City or town, state, and ZIP code DAYTON, OH 45420		C If exemption application is pending, check here <input type="checkbox"/>
	H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 31,238,568.		J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(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				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	2,845.	2,845.	2,845.	
	4 Dividends and interest from securities				
	5a Gross rents	37,970.	37,970.	37,970.	STATEMENT 1
	b Net rental income or (loss) 35,738.				STATEMENT 2
	6a Net gain or (loss) from sale of assets not on line 10	771,477.			
	b Gross sales price for all assets on line 6a 1,058,365.				
	7 Capital gain net income (from Part IV, line 2)		771,477.		
	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) NOV 18 2010					
11 Other income	3,309,162.	3,309,162.	3,309,162.	STATEMENT 3	
12 Total. Add lines 1 through 11	4,121,454.	4,121,454.	3,349,977.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	274,955.	274,955.	274,955.	0.
	14 Other employee salaries and wages	145,661.	145,661.	145,661.	0.
	15 Pension plans, employee benefits	130,223.	130,223.	130,223.	0.
	16a Legal fees STMT 4	17,208.	17,208.	17,208.	0.
	b Accounting fees STMT 5	12,901.	12,901.	12,901.	0.
	c Other professional fees				
	17 Interest	195,734.	195,734.	195,734.	0.
	18 Taxes STMT 6	451,373.	451,373.	451,373.	0.
	19 Depreciation and depletion	1,328,166.	1,328,166.	1,328,166.	
	20 Occupancy	1,537,980.	1,352,345.	1,352,345.	185,635.
	21 Travel, conferences, and meetings	17,861.	17,861.	17,861.	0.
	22 Printing and publications				
	23 Other expenses STMT 7	195,027.	195,027.	195,027.	0.
	24 Total operating and administrative expenses. Add lines 13 through 23	4,307,089.	4,121,454.	4,121,454.	185,635.
	25 Contributions, gifts, grants paid				
26 Total expenses and disbursements. Add lines 24 and 25	4,307,089.	4,121,454.	4,121,454.	185,635.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-185,635.				
b Net investment income (if negative, enter -0-)		0.			
c Adjusted net income (if negative, enter -0-)			0.		

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LHA For Privacy Act and Paperwork Reduction Act Notice, see the instructions.

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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	111,888.	14,613.	14,613.
	2 Savings and temporary cash investments		15,477.	15,477.
	3 Accounts receivable ▶ 54,663.			
	Less: allowance for doubtful accounts ▶	99,187.	54,663.	54,663.
	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	2,051.		
	10a Investments - U.S. and state government obligations STMT 8	41,832.	36,692.	36,692.
	b Investments - corporate stock			
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶ 4,487,572.			
	Less: accumulated depreciation ▶ 72,085.	4,417,289.	4,415,487.	4,691,570.
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶ 45,603,122.			
	Less: accumulated depreciation ▶ 17,292,634.	29,263,303.	28,310,488.	26,372,680.
	15 Other assets (describe ▶ STATEMENT 9)	59,922.	52,873.	52,873.
	16 Total assets (to be completed by all filers)	33,995,472.	32,900,293.	31,238,568.
	17 Accounts payable and accrued expenses	874,537.	724,288.	
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue	81,515.	62,737.	
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable	9,693,290.	9,428,186.	
	22 Other liabilities (describe ▶ LINE OF CREDIT)	1,234,701.	774,701.	
	23 Total liabilities (add lines 17 through 22)	11,884,043.	10,989,912.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input checked="" type="checkbox"/>			
	24 Unrestricted	22,111,429.	21,910,381.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
29 Retained earnings, accumulated income, endowment, or other funds				
30 Total net assets or fund balances	22,111,429.	21,910,381.		
31 Total liabilities and net assets/fund balances	33,995,472.	32,900,293.		

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	22,111,429.
2 Enter amount from Part I, line 27a	2	-185,635.
3 Other increases not included in line 2 (itemize) ▶ UNREALIZED GAINS	3	787.
4 Add lines 1, 2, and 3	4	21,926,581.
5 Decreases not included in line 2 (itemize) ▶ TAX PROVISION	5	16,200.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	21,910,381.

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 SALE OF LAND		P	01/01/82	07/24/09
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a 1,058,365.		286,888.	771,477.	
b				
c				
d				
e				
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			771,477.	
b				
c				
d				
e				
2 Capital gain net income or (net capital loss)		<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> <div style="margin-left: 10px;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;">2</div> </div> </div>		771,477.
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		<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;"> If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 </div> <div style="margin-left: 10px;"> <div style="border: 1px solid black; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;">3</div> </div> </div>		0.

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.)

N/A

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			
2007			
2006			
2005			
2004			

2 Total of line 1, column (d)

2

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

4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5

4

5 Multiply line 4 by line 3

5

6 Enter 1% of net investment income (1% of Part I, line 27b)

6

7 Add lines 5 and 6

7

8 Enter qualifying distributions from Part XII, line 4

8

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	0.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input 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	0.
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	0.
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		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	17,000.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	17,000.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	17,000.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input type="checkbox"/> 0. Refunded <input checked="" type="checkbox"/>	11	17,000.	

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 type="checkbox"/> \$ 0. (2) On foundation managers. <input 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 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.	2	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	3	X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	X
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5	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?	6	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.	7	X
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> OH		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	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	9	X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X

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.THERESEARCHPARK.COM	13	X	
14	The books are in care of ► CHARLIE GILES Located at ► 3155 RESEARCH BLVD, DAYTON, OH	Telephone no. ► 937-252-5906 ZIP+4 ► 45420		
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 X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see 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 X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b X

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☐

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

6b

X

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

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

7b

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

N/A

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 10		328,655.	50,052.	14,467.

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
JAMES BAILEY 3155 RESEARCH BLVD, DAYTON, OH 45432	OPERATIONS 40.00	70,200.	814.	0.

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."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
PROFESSIONAL MAINTENANCE P O BOX 2837, DAYTON, OH 45401 WOOLPERT	MAINTENANCE	161,925.
P O BOX 641998, CINCINNATI, OH 45264 TR GEAR LANDSCAPING	ENGINEERING	128,987.
P O BOX 632763, CINCINNATI, OH 45263	LAWN CARE	78,651.

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

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 SEE STATEMENT 11	4,323,289.
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 IDEA CENTER	405,081.
2	
3 All other program-related investments. See instructions.	
Total. Add lines 1 through 3	405,081.

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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	39,262.
b	Average of monthly cash balances	1b	70,989.
c	Fair market value of all other assets	1c	4,691,570.
d	Total (add lines 1a, b, and c)	1d	4,801,821.
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	4,801,821.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	72,027.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,729,794.
6	Minimum investment return. Enter 5% of line 5	6	236,490.

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	236,490.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	236,490.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	236,490.
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	236,490.

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	185,635.
b	Program-related investments - total from Part IX-B	1b	405,081.
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	590,716.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	590,716.

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.

Form 990-PF (2009)

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				236,490.
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				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$ 590,716.				
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				236,490.
e Remaining amount distributed out of corpus	354,226.			
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	354,226.			
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	354,226.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009	354,226.			

FORM 990-PF	RENTAL INCOME	STATEMENT	1
KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME	
FARM RENTAL	4	37,970.	
TOTAL TO FORM 990-PF, PART I, LINE 5A		37,970.	

FORM 990-PF	RENTAL EXPENSES	STATEMENT	2
DESCRIPTION	ACTIVITY NUMBER	AMOUNT	TOTAL
DEPRECIATION		1,802.	
OCCUPANCY COSTS		430.	
- SUBTOTAL -	4		2,232.
TOTAL RENTAL EXPENSES			2,232.
NET RENTAL INCOME TO FORM 990-PF, PART I, LINE 5B			35,738.

FORM 990-PF	OTHER INCOME	STATEMENT	3
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
RESEARCH PARK RENTALS	3,309,162.	3,309,162.	3,309,162.
TOTAL TO FORM 990-PF, PART I, LINE 11	3,309,162.	3,309,162.	3,309,162.

FORM 990-PF	LEGAL FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
	17,208.	17,208.	17,208.	0.	
TO FM 990-PF, PG 1, LN 16A	17,208.	17,208.	17,208.	0.	

FORM 990-PF	ACCOUNTING FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
	12,901.	12,901.	12,901.	0.
TO FORM 990-PF, PG 1, LN 16B	12,901.	12,901.	12,901.	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
	451,373.	451,373.	451,373.	0.
TO FORM 990-PF, PG 1, LN 18	451,373.	451,373.	451,373.	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
	195,027.	195,027.	195,027.	0.
TO FORM 990-PF, PG 1, LN 23	195,027.	195,027.	195,027.	0.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	8
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
MARKETABLE SECURITIES	X		36,692.	36,692.
TOTAL U.S. GOVERNMENT OBLIGATIONS			36,692.	36,692.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			36,692.	36,692.

FORM 990-PF	OTHER ASSETS	STATEMENT	9
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
INTANGIBLE ASSETS - LOAN COSTS	59,922.	52,873.	52,873.
TO FORM 990-PF, PART II, LINE 15	59,922.	52,873.	52,873.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 10

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
MARY H. BOOSALIS 1 WYOMING STREET DAYTON, OH 45409	TRUSTEE 1.00	0.	0.	0.
KATHLEEN CARLSON 120 W THIRD STREET DAYTON, OH 45402	TRUSTEE 1.00	0.	0.	0.
ROBERT F. CHELLE 300 COLLEGE PARK DRIVE DAYTON, OH 45409	TRUSTEE 1.00	0.	0.	0.
DANIEL J. CURRAN 300 COLLEGE PARK DRIVE DAYTON, OH 45409	TRUSTEE 1.00	0.	0.	0.
JOHN W. GARLAND 1400 BRUSH ROW WILBERFORCE, OH 45384	TRUSTEE 1.00	0.	0.	0.
JAMES R. HOEHN 6 NORTH MAIN STREET DAYTON, OH 45402	TRUSTEE 1.00	0.	0.	0.
DAVID R. HOPKINS 260 UNIVERSITY HALL DAYTON, OH 45435	TRUSTEE 1.00	0.	0.	0.
STEVEN L. JOHNSON 444 WEST THIRD STREET DAYTON, OH 45402	TRUSTEE 1.00	0.	0.	0.
LAWRENCE PORTER 161 COPPERFIELD DRIVE DAYTON, OH 45415	TRUSTEE 1.00	0.	0.	0.
CAROL S. WARNER 10661 CHESTNUT HILL LANE CENTERVILLE, OH 45458	TRUSTEE 1.00	0.	0.	0.
PAULA G. THORNHILL 3155 RESEARCH PARK BLVD DAYTON, OH 45420	TRUSTEE 1.00	0.	0.	0.

MIAMI VALLEY RESEARCH FOUNDATION

31-0996772

MICHAEL HERR 10 W SECOND STREET, #2000 DAYTON, OH 45402	TRUSTEE 1.00	0.	0.	0.
CHARLES E. GILES 3155 RESEARCH PARK BLVD DAYTON, OH 45420	ACCOUNTANT/ TRUSTEE 20.00	53,700.	0.	0.
BRUCE E. PEARSON 3155 RESEARCH PARK BLVD DAYTON, OH 45420	PRESIDENT/CEO 40.00	172,205.	30,125.	14,467.
BRENDA BLANK 3155 RESEARCH PARK BLVD DAYTON, OH 45420	PROGRAM MANAGER 40.00	102,750.	19,927.	0.

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII	328,655.	50,052.	14,467.
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FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT	11
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ACTIVITY ONE

THE FOUNDATION FOSTERS AND PROMOTE RESEARCH, TECHNICAL, SCIENTIFIC AND EDUCATIONAL ACTIVITIES, CREATES AND PRESERVES JOBS AND EMPLOYMENT OPPORTUNITIES, AND IMPROVES ECONOMIC WELFARE OF THE METROPOLITAN DAYTON AREA. CURRENTLY, 43 ORGANIZATIONS ARE LOCATED AT THE PARK, WHICH EMPLOYS 4,500 PEOPLE.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 1

4,323,289.

MVRPF
Fixed Assets
12/31/2009

	<u>Bal. @ BOY</u>	<u>Additions</u>	<u>Disposals</u>	<u>CIP Transfer</u>	<u>Bal. @ EOY</u>
Costs					
1401.1 Land	7,962,154.95		(140,097.68)		7,822,057.27
1401.2 Land Improvement	5,774,844.80				5,774,844.80
1403.1 Building - 1900 Founders Drive	16,261,067.36	76,844.22			16,337,911.58
1403.2 Building - Headquarters Bldg.	5,436,862.29	3,177.50			5,440,039.79
1403.3 Building - Tech Center Bldg. #3	2,959,372.74				2,959,372.74
1403.4 Building - Tech Center Bldg. #4	3,003,674.45				3,003,674.45
1403.5 Building - Shakertown Rd Rental	56,755.73				56,755.73
1403.6 Building - Woodman Drive Rental	62,331.56				62,331.56
1403.7 Building - Research Blvd Rental	68,996.87				68,996.87
1406.1 Capital - Movable Assets	103,154.66				103,154.66
1407.5 Idea Center Land Improvements	643,658.71				643,658.71
1407.6 Idea Center Land Improvements	900,628.35	405,081.08			1,305,709.43
1403.44 Building TC IV	6,490,690.17	21,496.13			6,512,186.30
	<u>49,724,192.64</u>	<u>506,598.93</u>	<u>(140,097.68)</u>	<u>-</u>	<u>50,090,693.89</u>
Accum Depr					
1401.3 Accum Deprec - Land Improvement	(92,410.65)	(62,006.65)			(154,417.30)
1404.1 Accum Deprec - 1900 Fndrs Drive	(10,007,896.00)	(586,736.32)			(10,594,632.32)
1404.2 Accum Deprec - Headquarters Bld	(3,104,911.34)	(178,401.37)			(3,283,312.71)
1404.3 Accum Deprec - Tech Center #3	(1,253,745.55)	(98,809.18)			(1,352,554.73)
1404.4 Accum Deprec - Tech Center #4	(1,054,782.77)	(94,089.03)			(1,148,871.80)
1404.5 Accum Deprec - Shakertown Road	(32,136.00)	(1,802.00)			(33,938.00)
1404.6 Accum Deprec - Woodman Drive	(19,240.00)				(19,240.00)
1404.7 Accum Deprec - Research Blvd.	(18,907.45)				(18,907.45)
1404.8 Accum Deprec - Idea Center	(117,342.47)	(129,957.83)			(247,300.30)
1405.1 Accum Deprec - Equipment	(94,852.92)	(2,886.85)			(97,739.77)
1404.44 Accum Deprec - TC IV	(247,376.22)	(166,427.95)			(413,804.17)
	<u>(16,043,601.37)</u>	<u>(1,321,117.18)</u>	<u>-</u>	<u>-</u>	<u>(17,364,718.55)</u>

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

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

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

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

Type or print File by the extended due date for filing the return. See instructions	Name of Exempt Organization		Employer identification number
	MIAMI VALLEY RESEARCH FOUNDATION		31-0996772
	Number, street, and room or suite no. If a P.O. box, see instructions		For IRS use only
	3155 RESEARCH BLVD		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.		
	DAYTON, OH 45420		

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.

CHARLIE GILES

- The books are in the care of ☒ **3155 RESEARCH BLVD - DAYTON, OH 45420**

Telephone No ☒ **937-252-5906**

FAX No. ☐

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

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

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

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

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

7 State in detail why you need the extension

**ADDITIONAL TIME IS REQUIRED TO FILE A COMPLETE AND ACCURATE RETURN.
THE ENTITY IS STILL WAITING ON FINAL YEAR END FIGURES.**

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	\$	17,000.
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	\$	17,000.
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 ☒ **CPA**

Date ☒