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# Return of Private Foundation 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.

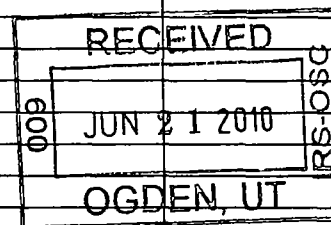
For calendar year 2009, or tax year beginning , and ending

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

Use the IRS label. Otherwise, print or type. See Specific Instructions	Name of foundation <b>J WILLIAM &amp; MARY STRAKER CHARITABLE FDN</b>		A Employer identification number <b>31-1396841</b>
	C/O SUSAN HOLDREN Number and street (or P.O. box number if mail is not delivered to street address)		B Telephone number <b>740-453-2220</b>
	P.O. BOX 910 Room/suite		C If exemption application is pending, check here <input type="checkbox"/>
	City or town, state, and ZIP code <b>ZANESVILLE, OH 43702</b>		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <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			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 2,185,622.</b> (Part I, column (d) must be on cash basis.)			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		4,140.	4,140.		STATEMENT 1
4 Dividends and interest from securities		32,609.	32,609.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		<32,168.>			
b Gross sales price for all assets on line 6a <b>484,787.</b>					
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		<17,468.>	<103.>		STATEMENT 3
12 Total. Add lines 1 through 11		<12,887.>	36,646.		
13 Compensation of officers, directors, trustees, etc		26,253.	0.		13,126.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 4		2,510.	200.		0.
c Other professional fees					
17 Interest					
18 Taxes STMT 5		2,342.	0.		1,104.
19 Depreciation and depletion		2,423.	0.		
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 6		10,877.	7,177.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		44,405.	7,377.		14,230.
25 Contributions, gifts, grants paid		43,500.			43,500.
26 Total expenses and disbursements. Add lines 24 and 25		87,905.	7,377.		57,730.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<100,792.>			
b Net investment income (if negative, enter -0-)			29,269.		
c Adjusted net income (if negative, enter -0-)				N/A	

SCANNED JUN 25 2010



**J WILLIAM & MARY STRAKER CHARITABLE FDN**  
**C/O SUSAN HOLDREN**

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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
<b>Assets</b>	1	Cash - non-interest-bearing	370.	15,271.	15,271.
	2	Savings and temporary cash investments	14,768.	24,742.	24,742.
	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>STMT 7</b>	12,948.	21,430.	21,430.
	b	Investments - corporate stock <b>STMT 8</b>	676,898.	452,569.	438,792.
	c	Investments - corporate bonds <b>STMT 9</b>	49,347.	49,347.	44,580.
<b>Liabilities</b>	11	Investments - land, buildings, and equipment basis ▶ <b>6,672.</b>			
		Less accumulated depreciation <b>STMT 10 ▶ 6,672.</b>			
	12	Investments - mortgage loans			
	13	Investments - other <b>STMT 11</b>	824,668.	919,246.	1,060,969.
	14	Land, buildings, and equipment: basis ▶ <b>611,057.</b>			
		Less accumulated depreciation <b>STMT 12 ▶ 31,378.</b>	582,102.	579,679.	579,679.
	15	Other assets (describe ▶ <b>W/C DEPOSIT</b> )	159.	159.	159.
	16	<b>Total assets</b> (to be completed by all filers)	2,161,260.	2,062,443.	2,185,622.
	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	<b>Total liabilities</b> (add lines 17 through 22)	0.	0.	
<b>Net Assets or Fund Balances</b>		<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/>			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/>			
	27	Capital stock, trust principal, or current funds	2,441,059.	2,441,059.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29	Retained earnings, accumulated income, endowment, or other funds	<279,799.>	<378,616.>	
	30	<b>Total net assets or fund balances</b>	2,161,260.	2,062,443.	
	31	<b>Total liabilities and net assets/fund balances</b>	2,161,260.	2,062,443.	

**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	2,161,260.
2	Enter amount from Part I, line 27a	2	<100,792.>
3	Other increases not included in line 2 (itemize) ▶ <b>TEPPCO CAPITAL BALANCE ADJUSTMENT</b>	3	1,975.
4	Add lines 1, 2, and 3	4	2,062,443.
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	2,062,443.

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**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.)
<b>1a HUNTINGTON NATIONAL BANK-SEE ATTACHED</b>			
<b>b STATEMENT</b>		VARIOUS	VARIOUS
<b>c HUNTINGTON NATIONAL BANK-SEE ATTACHED</b>			
<b>d STATEMENT</b>		VARIOUS	VARIOUS
<b>e CAPITAL GAINS DIVIDENDS</b>			

(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)
<b>a</b>			
<b>b 265,476.</b>		<b>274,604.</b>	<b>&lt;9,128.&gt;</b>
<b>c</b>			
<b>d 218,902.</b>		<b>242,351.</b>	<b>&lt;23,449.&gt;</b>
<b>e 409.</b>			<b>409.</b>

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	
<b>a</b>			
<b>b</b>			<b>&lt;9,128.&gt;</b>
<b>c</b>			
<b>d</b>			<b>&lt;23,449.&gt;</b>
<b>e</b>			<b>409.</b>

<b>2</b> 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 }	<b>2</b>	<b>&lt;32,168.&gt;</b>
<b>3</b> 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		<b>3</b>	<b>N/A</b>

**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	118,793.	1,794,219.	.066209
2007	113,006.	2,214,647.	.051027
2006	95,633.	2,037,037.	.046947
2005	81,529.	1,961,021.	.041575
2004	42,985.	1,871,849.	.022964

<b>2</b> Total of line 1, column (d)	<b>2</b>	<b>.228722</b>
<b>3</b> 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	<b>3</b>	<b>.045744</b>
<b>4</b> Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	<b>4</b>	<b>1,334,913.</b>
<b>5</b> Multiply line 4 by line 3	<b>5</b>	<b>61,064.</b>
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	<b>293.</b>
<b>7</b> Add lines 5 and 6	<b>7</b>	<b>61,357.</b>
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	<b>57,730.</b>

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.

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**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)			
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		1	585.
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	585.
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	585.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	2,750.	
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	2,750.	
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	2,165.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input type="checkbox"/> 2,165. Refunded <input type="checkbox"/> 0.	11		0.

**Part VII-A Statements Regarding Activities**

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
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.	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	X	
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

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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 <b>N/A</b>	13	X	
14	The books are in care of <b>SUSAN STRAKER HOLDREN</b> Telephone no. <b>740-453-2220</b> Located at <b>4900 BOGGS ROAD, ZANESVILLE, OH</b> ZIP+4 <b>43701</b>			
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 <b>15</b> <b>N/A</b>			

**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 <b>N/A</b>	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <b>N/A</b>	2a	
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.) <b>N/A</b>	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. <b>N/A</b>		
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.) <b>N/A</b>	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

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

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

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
SUSAN STRAKER HOLDREN	PRESIDENT & TREASURER			
1762 GERARD CIRCLE				
ZANESVILLE, OH 43701	20.00	26,253.	0.	0.
JOHN W. STRAKER, JR	SECRETARY			
2751 SILVER STREET				
GRANVILLE, OH 43023	2.00	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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**3 Five highest-paid independent contractors for professional services. If none, enter "NONE."**

<b>Total</b> number of others receiving over \$50,000 for professional services	▶	C
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Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.		Amount
1	N/A	
2		
	All other program-related investments. See instructions.	
3		
<b>Total.</b> Add lines 1 through 3		0

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	1,355,242.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	
<b>c</b>	Fair market value of all other assets	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	1,355,242.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	1,355,242.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	20,329.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	1,334,913.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	66,746.

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	66,746.
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	585.
<b>b</b>	Income tax for 2009. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	585.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	66,161.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	66,161.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	66,161.

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	57,730.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	57,730.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	0.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	57,730.

**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				66,161.
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	20,965.			
f Total of lines 3a through e	20,965.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$ 57,730.				
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				57,730.
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).)	8,431.			8,431.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	12,534.			
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	12,534.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008	12,534.			
e Excess from 2009				

## J WILLIAM &amp; MARY STRAKER CHARITABLE FDN

Form 990-PF (2009)

C/O SUSAN HOLDREN

31-1396841

Page 10

**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)

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

Tax year

(a) 2009

(b) 2008

Prior 3 years

(c) 2007

(d) 2006

(e) Total

**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:

SUSAN S. HOLDREN, P.O. BOX 910, ZANESVILLE, OH 43702

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

NO SPECIFIC FORM REQUIRED

c Any submission deadlines:

NONE

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

PRIMARILY MUSKINGUM COUNTY, OHIO AREA

**Part XV** **Supplementary Information** (continued)

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
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)				
<b>a Paid during the year</b>				
EAST MUSKINGUM SCHOOLS 13505 JOHN GLENN SCHOOL ROAD NEW CONCORD, OH 43762	N/A	EXEMPT	GUIDED READING BOOKS	4,000.
OHIO UNIVERSITY FOUNDATION 1425 NEWARK ROAD ZANESVILLE, OH 43701	N/A	EXEMPT	SCHOLARSHIP/BUI ADDITION	10,000.
TRI- VALLEY SCHOOLS 36 EAST MUSKINGUM AVENUE DRESEN, OH 43821	N/A	EXEMPT	STADIUM TURF PROJECT	5,000.
WEST MUSKINGUM SCHOOLS 4880 WEST PIKE ZANESVILLE, OH 43701	N/A	EXEMPT	EARLY LEARNING PROGRAM	7,500.
SALVATION ARMY 515 PUTNAM AVE ZANESVILLE, OH 43701	N/A	EXEMPT	SUMMER CAMP	17,000.
<b>Total</b>			<b>▶ 3a</b>	<b>43,500.</b>
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>			<b>▶ 3b</b>	<b>0.</b>

[illegible]

(See worksheet in line 13 instructions to verify calculations.)

[illegible]

## Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

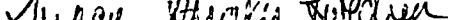
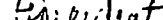
- |          |  | Yes   | No |
|----------|--|-------|----|
| <b>1</b> | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?  |       |    |
| <b>a</b> | Transfers from the reporting foundation to a noncharitable exempt organization of:   |       |    |
|          | (1) Cash   | 1a(1) | X  |
|          | (2) Other assets   | 1a(2) | X  |
| <b>b</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  |
| <b>c</b> | Sharing of facilities, equipment, mailing lists, other assets, or paid employees   | 1c    | X  |
| <b>d</b> | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. |       |    |

[illegible]

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

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

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

Sign Here	 Signature of officer or trustee		16-18-10 Date	 Title
	Preparer's signature <b>NOBLE B. SNOW, III, CPA</b>		Date <b>06/08/10</b>	Check if self-employed <input type="checkbox"/>
Paid Preparer's Use Only	Firm's name (or yours if self-employed). <b>WILSON, SHANNON &amp; SNOW, INC.</b>		Preparer's identifying number	
	address, and ZIP code <b>TEN WEST LOCUST STREET NEWARK, OH 43055</b>		EIN <input type="checkbox"/> Phone no. <b>740-345-6611</b>	

Form **990-PF** (2009)

2009 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	C o n v	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
	BUILDINGS														
3	BUILDING	01/01/97	SL	39.00	MM	17	81,566.				81,566.	25,008.		2,091.	27,099.
4	IMPROVEMENTS	01/01/97	SL	39.00	MM	17	7,639.				7,639.	2,344.		196.	2,540.
5	ROOFING	01/09/97	SL	39.00	MM	17	1,722.				1,722.	526.		44.	570.
6	ELECTRICAL	04/18/97	SL	39.00	MM	17	3,594.				3,594.	1,077.		92.	1,169.
8	BUILDING	08/01/99		.000	HY	16	507,536.				507,536.			0.	
	* 990-PF PG 1 TOTAL						602,057.				602,057.	28,955.		2,423.	31,378.
	BUILDINGS														
	FURNITURE & FIXTURES														
1	OFFICE FURN/EQUIP	10/09/94	SL	10.00	HY	17	5,372.				5,372.	5,372.		0.	5,372.
	* 990-PF PG 1 TOTAL						5,372.				5,372.	5,372.		0.	5,372.
	FURNITURE & FIXTURES														
	LAND														
7	LAND	01/01/97	L		HY		9,000.				9,000.			0.	
	* 990-PF PG 1 TOTAL LAND						9,000.				9,000.	0.		0.	0.
	OTHER														
9	OFFICE IMP	10/09/94		10M	HY	43	1,300.				1,300.	1,300.		0.	1,300.
10	LOAN COSTS	11/11/01		157M	HY	43	2,000.				2,000.	2,000.		0.	2,000.
	* 990-PF PG 1 TOTAL OTHER						3,300.				3,300.	3,300.		0.	3,300.
	* GRAND TOTAL 990-PF PG 1						619,729.				619,729.	37,627.		2,423.	40,050.
	DEPR & AMORT														

928111  
04-24-09

(D) - Asset disposed

\* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

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

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SOURCE	AMOUNT
HUNTINGTON	8.
MERRILL LYNCH	4,132.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	4,140.

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FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
HUNTINGTON	17,025.	409.	16,616.
MERRILL LYNCH	15,993.	0.	15,993.
TOTAL TO FM 990-PF, PART I, LN 4	33,018.	409.	32,609.

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FORM 990-PF OTHER INCOME STATEMENT 3

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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
PARTNERSHIPS	<103.>	<103.>	
PARTNERSHIPS	<17,365.>	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	<17,468.>	<103.>	

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FORM 990-PF ACCOUNTING FEES STATEMENT 4

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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	2,510.	200.		0.
TO FORM 990-PF, PG 1, LN 16B	2,510.	200.		0.

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## FORM 990-PF

## TAXES

## STATEMENT

5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL	2,008.	0.		1,004.
WORKERS COMP	201.	0.		100.
REAL ESTATE TAXES	133.	0.		0.
TO FORM 990-PF, PG 1, LN 18	2,342.	0.		1,104.

## FORM 990-PF

## OTHER EXPENSES

## STATEMENT

6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	7,080.	7,080.		0.
FOREIGN TAXES	97.	97.		0.
STATE FILING FEE	200.	0.		0.
MISC	500.	0.		0.
INSURANCE	3,000.	0.		0.
TO FORM 990-PF, PG 1, LN 23	10,877.	7,177.		0.

## FORM 990-PF

## U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS

## STATEMENT

7

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
HUNTINGTON TREASURY MONEY MARKET	X		21,430.	21,430.
TOTAL U.S. GOVERNMENT OBLIGATIONS			21,430.	21,430.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			21,430.	21,430.

FORM 990-PF

CORPORATE STOCK

STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CHEVRON TEXACO CORP COM	0.	0.
EXXON-MOBIL CORP COM	0.	0.
UNITED TECHNOLOGIES CORP	0.	0.
NOKIA CORP-SPON ADR	15,074.	8,353.
HEWLETT PACKARD CO	17,662.	21,377.
DEERE & CO	14,651.	15,145.
DOW CHECMICAL	0.	0.
EXELON CORP	16,495.	13,928.
FPL GROUP INC	23,188.	24,033.
EMERSON ELECTRIC CO	25,947.	26,199.
NIKE INC	15,528.	15,857.
PROCTER & GAMBLE CO	38,833.	36,681.
AT&T INC	18,852.	15,557.
GOLDMAN SACHS GROUP INC	21,214.	16,884.
PRUDENTIAL FINANCIAL INC	20,533.	11,196.
BANK OF AMERICA CORP	0.	0.
GENERAL MILLS INC	19,321.	24,075.
BRISTOL-MYERS SQUIBB CO	17,268.	15,908.
JOHNSON & JOHNSON INC	16,919.	16,425.
SCHERING-PLOUGH CORP	0.	0.
WYETH	0.	0.
CHUBB CORP	19,573.	18,934.
TRAVELERS COS INC	24,771.	25,179.
CANADIAN NATL RAILWAY COM	13,432.	16,580.
APPLIED MATERIALS INC	0.	0.
INTEL CORP	0.	0.
PEPSICO INC	38,408.	36,784.
MICROSOFT CORP	20,156.	20,117.
GENERAL DYNAMICS CORP	9,392.	8,521.
JOHNSON CONTROLS INC	0.	0.
GILEAD SCIENCES INC	0.	0.
CISCO SYSTEMS	6,856.	7,541.
PPG INDUSTRIES	7,182.	6,439.
MEDTRONIC INC	0.	0.
VERIZON COMMUNICATIONS	8,265.	7,289.
MCDONALDS CORP	5,530.	5,620.
ORACLE CORPORATIONS	7,420.	9,444.
MERCK & CO	10,099.	14,726.
TOTAL TO FORM 990-PF, PART II, LINE 10B	452,569.	438,792.

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
PREFERRED PLUS TR CTF SERIES FMC-1	49,347.	44,580.
TOTAL TO FORM 990-PF, PART II, LINE 10C	49,347.	44,580.

FORM 990-PF	DEPRECIATION OF ASSETS HELD FOR INVESTMENT	STATEMENT	10
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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
OFFICE FURN/EQUIP	5,372.	5,372.	0.
OFFICE IMP	1,300.	1,300.	0.
TOTAL TO FM 990-PF, PART II, LN 11	6,672.	6,672.	0.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	11
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
BUCKEYE PARTNERS LP	COST	22,213.	54,450.
KINDER MORGAN ENERGY PTRS LP	COST	1,394.	60,980.
ONEOK PARTNERS LP	COST	1,931.	62,300.
TEPPCO PTRS LP	COST	0.	0.
PREF & CORP INC STRAT FD	COST	0.	0.
NUVEEN PFD & CONV INC FD 2	COST	0.	0.
NUSTAR ENERGY LP	COST	23,502.	57,380.
OPPENHEIMER DEVELOPING MARKET FUND	COST	0.	0.
VANGUARD INTERNATIONAL VALUE FUND	COST	0.	0.
FIDELITY INTERNATIONAL DISCOVERY FUND	COST	0.	0.
JANUS MID-CAP VALUE FUND	COST	38,853.	53,142.
ROYCE SPECIAL EQUITY FUND	COST	38,931.	51,670.
THORNBURG INTERNATIONAL VALUE	COST	0.	0.
ENERGY TRANSFER PARTNERS	COST	69,714.	89,940.
ENTERPRISE PRODUCTS PARTNERS LP	COST	16,403.	38,948.
TC PIPELINES LP	COST	59,682.	73,680.
HUNTINGTON INTERNATIONAL EQUITY FUND IV	COST	108,676.	161,670.
MAGELLAN MIDSTREAM PARTNERS LP	COST	62,304.	86,660.
PLAINS ALL AMERICAN PIPELINE LP	COST	77,670.	105,700.
BLACKROCK CREDIT ALLOCT	COST	298,175.	110,615.

NUVEEN MULTISTRATEGY	COST	99,798.	53,834.
TOTAL TO FORM 990-PF, PART II, LINE 13		919,246.	1,060,969.

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FORM 990-PF      DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT      STATEMENT 12

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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
BUILDING	81,566.	27,099.	54,467.
IMPROVEMENTS	7,639.	2,540.	5,099.
ROOFING	1,722.	570.	1,152.
ELECTRICAL	3,594.	1,169.	2,425.
LAND	9,000.	0.	9,000.
BUILDING	507,536.	0.	507,536.
TOTAL TO FM 990-PF, PART II, LN 14	611,057.	31,378.	579,679.

**Application for Extension of Time To File an  
Exempt Organization Return**

OMB No 1545-1709

► File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

**Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.****Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

**Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on e-file for Charities & Nonprofits.

Type or print  File by the due date for filing your return. See instructions.	Name of Exempt Organization <b>J WILLIAM &amp; MARY STRAKER CHARITABLE FDN C/O SUSAN HOLDREN</b>	Employer identification number <b>31-1396841</b>
	Number, street, and room or suite no. If a P O box, see instructions. <b>P.O. BOX 910</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>ZANESVILLE, OH 43702</b>	

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

- |   |   |                                    |
|---|---|------------------------------------|
| <input type="checkbox"/> Form 990               | <input type="checkbox"/> Form 990-T (corporation)                 | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL            | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ            | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A                              | <input type="checkbox"/> Form 8870 |

**SUSAN STRAKER HOLDREN**

- The books are in the care of ► **4900 BOGGS ROAD - ZANESVILLE, OH 43701**

Telephone No ► **740-453-2220**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 will cover.

- 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2010**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:  
 ► ☒ calendar year **2009** or  
 ► ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_.

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

<b>3a</b> 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.	<b>3a</b>	\$	<b>2,750.</b>
<b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$	<b>2,750.</b>
<b>c Balance Due.</b> Subtract line 3b from line 3a. 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.	<b>3c</b>	\$	<b>0.</b>

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. 4-2009)

# 2009 Tax Information Statement

Account Number: 7234001597  
Recipient's Tax ID number: XX-XXX6841  
Payer's Federal ID number: 31-0966785  
Questions? (800)707-6974  
☐ Corrected ☐ 2nd TIN notice

Payer's Name and Address  
HUNTINGTON NATIONAL BANK  
P.O. BOX 1558 - EA4E86  
COLUMBUS, OH 43216

## 2009 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
<b>Short Term Sales Reported on 1099-B</b>								
1250 0000	885215566	THORNBURG INTERNATIONAL VALUE - I SHARES	12/26/2008	01/29/2009	22,237.50	23,512.50	-1,275.00	0.00
270.0000	478366107	JOHNSON CTLS INC W/1 RT/SH	VARIOUS	02/05/2009	3,407.65	6,803.90	-3,396.25	0.00
621.9960	683974109	OPPENHEIMER DEVELOPING MARKET FUND - CLA	VARIOUS	02/05/2009	9,286.40	9,342.38	-55.98	0.00
2270 0000	315910208	FIDELITY INTERNATIONAL GROWTH & INCOME FUND	12/23/2008	02/26/2009	43,992.60	50,893.40	-6,900.80	0.00
2025.1060	921939203	VANGUARD INTERNATIONAL VALUE FUND - INVE	VARIOUS	03/18/2009	40,765.38	47,105.14	-6,339.76	0.00
335 0000	375558103	GILEAD SCIENCES INC	VARIOUS	06/23/2009	15,560.35	15,956.24	-395.89	0.00
2667 7290	446980400	HUNTINGTON SITUS FUND IV	VARIOUS	06/23/2009	33,053.16	28,697.42	4,355.74	0.00
754 8060	446990400	HUNTINGTON SITUS FUND IV	VARIOUS	06/23/2009	9,352.05	8,110.35	1,241.70	0.00
2667 7290	471023598	JANUS PERKINS MID CAP VALUE FUND - CLASS	VARIOUS	06/23/2009	42,763.70	42,000.82	762.88	0.00
75.0000	585055106	MEDTRONIC INC W/1 RT/SH	10/17/2008	06/23/2009	2,485.57	3,050.82	-565.25	0.00
2940.0000	780905782	ROYCE SPECIAL EQUITY FUND	12/26/2008	06/23/2009	42,571.20	39,131.40	3,439.80	0.00
<b>Total Short Term Sales Reported on 1099-B</b>						<b>265,475.56</b>	<b>274,604.37</b>	<b>0.00</b>

Long Term 15% Sales Reported on 1099-B

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

# 2009 Tax Information Statement

Page 8 of 20  
Ref: 7205

Account Number: 7234001597  
Recipient's Tax ID number: XX-XXX6841  
Payer's Federal ID number: 31-0966785  
Questions? (800)707-6974  
☐ Corrected ☐ 2nd TIN notice

Payer's Name and Address  
HUNTINGTON NATIONAL BANK  
P O BOX 1558 - EA4E86  
COLUMBUS, OH 43216

Recipient's Name and Address  
J WILLIAM & MH STRAKER  
CHARITABLE FDN  
PO BOX 910  
ZANESVILLE, OH 43701

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
625 0000	0382222105	APPLIED MATLS INC	01/26/2007	02/05/2009	6,316.21	11,174.94	-4,858.73	0.00
390.0000	060505104	BANK OF AMERICA CORP	01/26/2007	02/05/2009	1,638.73	20,381.40	-18,742.67	0.00
225 0000	260543103	DOW CHEMICAL CO	10/03/2007	02/05/2009	2,383.18	9,965.25	-7,582.07	0.00
1052 0940	683974109	OPPENHEIMER DEVELOPING MARKET FUND - CLA	VARIOUS	02/05/2009	15,707.76	43,830.56	-28,122.80	0.00
100.0000	136375102	CANADIAN NATL RAILWAY COM	01/26/2007	03/20/2009	3,365.98	4,404.00	-1,038.02	0.00
95.0000	244199105	DEERE & CO W/1 RT/SH	02/16/2007	03/20/2009	3,004.20	5,385.55	-2,381.35	0.00
55 0000	585055106	MEDTRONIC INC W/1 RT/SH	02/05/2008	03/20/2009	1,517.99	2,602.05	-1,084.06	0.00
220.0000	654902204	NOKIA CORP ADR 'A' +	02/16/2007	03/20/2009	2,461.79	5,101.80	-2,640.01	0.00
130 0000	68389X105	ORACLE CORPORATION W/1 RT/SH	02/05/2008	03/20/2009	2,259.39	2,554.50	-295.11	0.00
230 0000	806605101	SCHERING PLOUGH DIST W/1 RT/SH	02/02/2007	03/20/2009	5,394.14	5,763.80	-369.66	0.00
860 0000	166764100	CHEVRONTXACO CORP	10/30/2003	06/23/2009	57,000.88	30,788.00	26,212.88	0.00
820.0000	30231G102	EXXON MOBIL CORP	10/30/2003	06/23/2009	56,776.07	30,053.00	26,723.07	0.00
270 0000	375558103	GILEAD SCIENCES INC	01/30/2008	06/23/2009	12,541.17	12,004.20	536.97	0.00
585 0000	458140100	INTEL CORP	01/26/2007	06/23/2009	9,236.97	12,051.00	-2,814.03	0.00
95 0000	585055106	MEDTRONIC INC W/1 RT/SH	02/05/2008	06/23/2009	3,148.39	4,494.45	-1,346.06	0.00
265 0000	913017109	UNITED TECH CORP	02/02/2007	06/23/2009	13,674.12	18,046.50	-4,372.38	0.00
340 0000	983024100	WYETH	02/02/2007	06/23/2009	15,103.02	17,312.80	-2,209.78	0.00
296 3100	806605101	SCHERING PLOUGH DIST W/1 RT/SH	VARIOUS	11/05/2009	7,350.00	6,419.93	930.07	0.00
.6900	58933Y105	MERCK & CO INC	02/02/2007	11/17/2009	22.50	17.29	5.21	0.00
Total Long Term 15% Sales Reported on 1099-B					218,902.49	242,351.02	-23,448.53	0.00

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