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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 changeUse the IRS
label.
Otherwise,
print
or type.
See Specific
Instructions.

Name of foundation

THE LONGABERGER FOUNDATION

C/O RACHEL L. STUKEY

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

1500 E MAIN STREET, P O BOX 3400

Room/suite

City or town, state, and ZIP code

NEWARK, OH 43058-3400

A Employer identification number

31-1575931

B Telephone number

(740) 322-5308

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

H Check type of organization

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

I Fair market value of all assets at end of year

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

>\$ 5,783,268.

J Accounting method

☒ Cash☐ Accrual☐ Other (specify)

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

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received	6,502.		N/A	
2 Check ☒ if the foundation is not required to attach Sch. B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	102,133.	102,133.		STATEMENT 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	<206,949.>			
b Gross sales price for all assets on line 6a	967,506.			
7 Capital gain net income (from Part IV, line 2)		0.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss)				
11 Other income				
12 Total. Add lines 1 through 11	<98,314.>	102,133.		
13 Compensation of officers, directors, trustees, etc.	143,853.	0.		143,853.
14 Other employee salaries and wages	87,476.	0.		87,476.
15 Pension plans, employee benefits	15,702.	0.		15,702.
16a Legal fees STMT 2	400.	0.		400.
b Accounting fees				
c Other professional fees STMT 3	15,919.	15,919.		0.
17 Interest				
18 Taxes STMT 4	<5,823.>	0.		0.
19 Depreciation and depletion				
20 Occupancy				
21 Travel, conferences, and meetings	1,891.	0.		1,891.
22 Printing and publications				
23 Other expenses STMT 5	<4,327.>	0.		<4,327.>
24 Total operating and administrative expenses. Add lines 13 through 23	255,091.	15,919.		244,995.
25 Contributions, gifts, grants paid	405,000.			405,000.
26 Total expenses and disbursements. Add lines 24 and 25	660,091.	15,919.		649,995.
27 Subtract line 26 from line 12	<758,405.>			
a Excess of revenue over expenses and disbursements				
b Net investment income (if negative, enter -0-)		86,214.		
c Adjusted net income (if negative, enter -0-)			N/A	

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Part II Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	113,623.	123,275.	123,275.
	2 Savings and temporary cash investments	146,217.	103,838.	103,838.
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 6	5,782,611.	5,056,933.	5,556,155.
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	6,042,451.	5,284,046.	5,783,268.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	6,042,451.	5,284,046.	
30 Total net assets or fund balances	6,042,451.	5,284,046.		
31 Total liabilities and net assets/fund balances	6,042,451.	5,284,046.		

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	6,042,451.
2 Enter amount from Part I, line 27a	2	<758,405.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	5,284,046.
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	5,284,046.

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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.)
1a				
b SEE ATTACHED STATEMENT				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 967,506.		1,174,455.	<206,949.>

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or - Losses (from col. (h))
a			
b			
c			
d			
e			<206,949.>

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	<206,949.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	1,018,679.	6,687,386.	.152328
2007	1,235,955.	8,720,794.	.141725
2006	899,925.	8,801,486.	.102247
2005	1,160,468.	9,131,799.	.127080
2004	1,294,179.	9,364,220.	.138205

2 Total of line 1, column (d)	2	.661585
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	.132317
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	5,375,712.
5 Multiply line 4 by line 3	5	711,298.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	862.
7 Add lines 5 and 6	7	712,160.
8 Enter qualifying distributions from Part XII, line 4	8	649,995.

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 ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	1,724.
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	1,724.
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	1,724.
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	1,376.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	348.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7		1,724.
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		0.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be credited to 2010 estimated tax. Refunded ☐	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☐ \$ 0. (2) On foundation managers ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ 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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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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 ▶ N/A	13		
14	The books are in care of ▶ <u>RUSSELL W. DEATON</u> Telephone no ▶ <u>740-322-5308</u> Located at ▶ <u>1500 EAST MAIN STREET, NEWARK, OH</u> ZIP+4 ▶ <u>43055</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15		N/A

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

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

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

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

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
RACHEL L STUKEY	PRESIDENT/TREASURER			
1500 EAST MAIN STREET				
NEWARK, OH 430583400	20.00	0.	0.	0.
TAMALA LONGABERGER	VICE PRESIDENT			
1500 EAST MAIN STREET				
NEWARK, OH 430583400	1.00	0.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
MATTHEW ELLI - 1500 EAST MAIN STREET, NEWARK, OH 430583400	DIRECTOR OF OPERATIONS			
	40.00	0.	0.	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."

NONE

C

Part IX-A

Summary of Direct Charitable Activities

Expenses

N/A

Part IX-B

Summary of Program-Related Investments

Amount

$$\overline{N/A}$$

3

0.

923561
02-02-10

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	5,130,427.
b	Average of monthly cash balances	1b	327,149.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	5,457,576.
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	5,457,576.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	81,864.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,375,712.
6	Minimum investment return. Enter 5% of line 5	6	268,786.

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	268,786.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	1,724.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	1,724.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	267,062.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	267,062.
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	267,062.

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	649,995.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	649,995.
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	649,995.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				267,062.
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	835,624.			
b From 2005	713,528.			
c From 2006	470,464.			
d From 2007	817,457.			
e From 2008	687,056.			
f Total of lines 3a through e	3,524,129.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$	649,995.			
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				267,062.
e Remaining amount distributed out of corpus	382,933.			
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	3,907,062.			
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	835,624.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	3,071,438.			
10 Analysis of line 9:				
a Excess from 2005	713,528.			
b Excess from 2006	470,464.			
c Excess from 2007	817,457.			
d Excess from 2008	687,056.			
e Excess from 2009	382,933.			

THE LONGABERGER FOUNDATION

Form 990-PF (2009)

C/O RACHEL L. STUKEY

31-1575931

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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

SEE STATEMENT 8

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

SEE STATEMENT 8

c Any submission deadlines

SEE STATEMENT 8

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

SEE STATEMENT 8

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

Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)					
a Paid during the year					
SEE STATEMENT 7					
Total					▶ 3a 405,000.
b Approved for future payment					
NONE					
Total					▶ 3b 0.

Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions to verify calculations)

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes)

NOT APPLICABLE

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

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

[illegible]

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

b If "Yes," complete the following schedule		
(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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

Signature of officer or trustee: [Signature] Date: 8/4/10 Title: Vice-President

Paid Preparer's Use Only Preparer's signature: <u>[Signature]</u> Firm's name (or yours if self-employed), address, and ZIP code: <u>[Blank]</u>	Date: <u>[Blank]</u>	Check if self-employed: ☐	Preparer's identifying number: <u>[Blank]</u>
	EIN: <u>[Blank]</u> Phone no: <u>[Blank]</u>		

Form **990-PF** (2009)

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	ALGER INSTL FUNDS	P	04/10/07	VARIOUS
b	NUVEEN FUNDS	P	10/18/06	VARIOUS
c	HANSBERGER INSTL SER GROWTH FUND	P	VARIOUS	VARIOUS
d	HANSBERGER INSTL SER GROWTH FUND	P	11/24/08	11/27/09
e	HARBOR FD CAP APPRECIATN	P	04/22/02	VARIOUS
f	DODGE & COX STK FD COM	P	12/20/00	VARIOUS
g	DODGE & COX FDS INTL STK FD	P	VARIOUS	VARIOUS
h	JP MORGAN TR II CORE BOND FUND	P	05/18/09	07/17/09
i	JP MORGAN TR II CORE BOND FUND	P	10/30/09	11/27/09
j	PIMCO TOTAL RET FD INSTL	P	12/20/00	VARIOUS
k	PIMCO TOTAL RET FD INSTL	P	VARIOUS	VARIOUS
l	CAPITAL GAINS DIVIDENDS			
m				
n				
o				

(e) Gross sales price		(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	137,784.		196,593.	<58,809.>
b	153,405.		253,062.	<99,657.>
c	150,078.		102,929.	47,149.
d	32,911.		18,049.	14,862.
e	97,258.		87,111.	10,147.
f	100,909.		112,488.	<11,579.>
g	172,505.		290,767.	<118,262.>
h	25,121.		25,006.	115.
i	28,029.		27,855.	174.
j	20,996.		20,783.	213.
k	40,206.		39,812.	394.
l	8,304.			8,304.
m				
n				
o				

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col. (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			<58,809.>
b			<99,657.>
c			47,149.
d			14,862.
e			10,147.
f			<11,579.>
g			<118,262.>
h			115.
i			174.
j			213.
k			394.
l			8,304.
m			
n			
o			

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

2

<206,949.>

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

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

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

3

N/A

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
AIM ACCOUNTS & COMMERCIAL PAPER INVESTMENTS	528.	0.	528.
AMERITRADE	109,904.	8,304.	101,600.
AMERITRADE	5.	0.	5.
TOTAL TO FM 990-PF, PART I, LN 4	110,437.	8,304.	102,133.

FORM 990-PF LEGAL FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	400.	0.		400.
TO FM 990-PF, PG 1, LN 16A	400.	0.		400.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CONSULTING FEES	15,919.	15,919.		0.
TO FORM 990-PF, PG 1, LN 16C	15,919.	15,919.		0.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
STATE OF OHIO - 2008 990PF FILING FEE	200.	0.		0.
FEDERAL 2008 REFUND 990PF	<6,023.>	0.		0.
TO FORM 990-PF, PG 1, LN 18	<5,823.>	0.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INSURANCE	1,284.	0.		1,284.	
BANK FEES	964.	0.		964.	
WITHHOLDING TAX TO BE PAID 2010	<6,575.>	0.		<6,575.>	
TO FORM 990-PF, PG 1, LN 23	<4,327.>	0.		<4,327.>	

FORM 990-PF	OTHER INVESTMENTS		STATEMENT	6
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
HARBOR CAPITAL APPRECIATION INSTITUTIONAL CLASS	COST	512,209.	701,728.	
DODGE & COX STOCK FD	COST	681,427.	693,322.	
PIMCO TOTAL RETURN INSTITUTIONAL (35)	COST	776,783.	815,799.	
JP MORGAN CORE BOND FUND SELECT	COST	772,438.	813,967.	
NUVEEN NWQ SMALL CAP VALUE FUND CLASS R	COST	799,616.	705,064.	
ALGER SMALLCAP GROWTH FUND	COST	749,799.	722,539.	
DODGE & COX INTERNATIONAL FUND	COST	454,580.	552,246.	
MONEY MARKET DEPOSIT ACCOUNT	COST	539.	539.	
HANSBERGER INSTL SER GROWTH	COST	309,542.	550,951.	
TOTAL TO FORM 990-PF, PART II, LINE 13		5,056,933.	5,556,155.	

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 7

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
A CALL TO COLLEGE 314 GRANVILLE STREET NEWARK, OH 43055	NONE SCHOLARSHIP SUPPORT	PUBLIC CHARITY	500.
ANIMAL SHELTER SOCIETY, INC 1421 SERENITY LANE ZANESVILLE, OH 43701-	NONE OPERATIONS SUPPORT	PUBLIC CHARITY	5,000.
CENTER FOR NEW BEGINNING SHELTER & SERVICES 60 NORTH FIRST STREET NEWARK, OH 43055	NONE SUPPORT FOR OPERATIONS	PUBLIC CHARITY	7,500.
DIRECT SELLING EDUCATION FOUNDATION 1667 K STREET, SUITE 1100 WASHINGTON, DC 20006	NONE SUPPORT OF PROGRAMS	PUBLIC CHARITY	10,000.
DRESDEN ELEMENTARY SCHOOL 1318 MAIN STREET DRESDEN, OH 43821	NONE ENGAGING DIGITAL LEARNERS WITH TECHNOLOGY	PUBLIC CHARITY	1,500.
ECHOING HILLS VILLAGE, INC 36272 CR79 WARSAW, OH 43844	NONE SUPPORT FOR CAMP IN-MOTION	PUBLIC CHARITY	2,000.
FIRST STEP FAMILY VIOLENCE INTERVENTION SERVICES, INC 604 WALNUT STREET COSHOCTON, OH 43812	NONE OPERATIONS/PROGRAMS	PUBLIC CHARITY	7,500.
FOOD PANTRY NETWORK OF LICKING COUNTY 823 STEEL AVENUE NEWARK, OH 43055	NONE SUPPORT FOR OPERATIONS	PUBLIC CHARITY	15,000.

THE LONGABERGER FOUNDATION C/O RACHEL L.			31-1575931
HARBOR HOUSE INC 1433 FIFTH STREET NW NEW PHILADELPHIA, OH 44663	NONE OPERATIONS/PROGRAMS	PUBLIC CHARITY	7,500.
HAVEN OF HOPE PO BOX 1196 CAMBRIDGE, OH 43725	NONE OPERATIONS/PROGRAMS	PUBLIC CHARITY	7,500.
HOUSE OF NEW HOPE 8135 MT VERNON RD ST LOUISVILLE, OH 43071	NONE SUPPORT OF PROGRAMS	PUBLIC CHARITY	5,000.
INTERNATIONAL REPUBLICAN INSTITUTE 1225 I STREET NW, SUITE 700 WASHINGTON, DC 20005	NONE SPONSORSHIP OF FREEDOM DINNER	PUBLIC CHARITY	15,000.
LICKING COUNTY COALITION OF CARE PO BOX 8663 NEWARK, OH 43058	NONE OPERATIONS/PROGRAMS	PUBLIC CHARITY	2,000.
LIVING WORD MINISTRIES 3860 STATE ROUTE 37 WEST JUNCTION CITY, OH 43748	NONE FOOD PURCHASE	PUBLIC CHARITY	300.
MARBURN ACADEMY 1860 WALDEN DRIVE COLUMBUS, OH 43229	NONE SCHOLARSHIP SUPPORT	PUBLIC CHARITY	35,000.
MARCH OF DIMES 1070 COLLEGE AVENUE COLUMBUS, OH 43209	NONE GENERAL SUPPORT	PUBLIC CHARITY	1,000.
MENTAL HEALTH AMERICA OF LICKING CO. 65 MESSIMER DRIVE NEWARK, OH 43055	NONE SUPPORT OF MARCH FOR BABIES	PUBLIC CHARITY	350.
MID-OHIO FOOD BANK 1625 W MOUND STREET COLUMBUS, OH 43223	NONE SUPPORT FOR HUNGER ASSISTANCE IN 8 COUNTY AREA	PUBLIC CHARITY	25,000.

MID-OHIO FOOD BANK 1625 W MOUND STREET COLUMBUS, OH 43223	NONE SUPPORT FOR FOOD PURCHASE & DISTRIBUTION IN COSHOCOTON	PUBLIC CHARITY	15,000.
MOUNDBUILDERS GUIDANCE CENTER 65 MESSIMER DRIVE NEWARK, OH 43055	NONE SUPPORT OF OPERATIONS	PUBLIC CHARITY	5,000.
MUSKINGUM VALLEY CHAPTER OF AMERICAN RED CROSS 22 SOUTH SEVENTH STREET ZANESVILLE, OH 43701	NONE SUPPORT OF OPERATIONS	PUBLIC CHARITY	5,000.
MUSKINGUM COUNTY COMMUNITY FOUNDATION 534 PUTNAM AVENUE ZANESVILLE, OH 43701	NONE ENDOWMENT FUND	PUBLIC CHARITY	100,000.
MUSKINGUM COUNTY COMMUNITY FOUNDATION 534 PUTNAM AVENUE ZANESVILLE, OH 43701	NONE MARTIN LUTHER KING, JR SCHOLARSHIP FUND	PUBLIC CHARITY	1,000.
MUSKINGUM COUNTY HEALTH DEPARTMENT 205 NORTH 7TH STREET ZANESVILLE, OH 43701	NONE EDUCATION PROGRAMS & TRAINING	PUBLIC CHARITY	1,000.
MUSKINGUM COUNTY CHILDREN'S SERVICES 205 N 7TH ST ZANESVILLE, OH 43701	NONE AVODALE YOUTH CENTER	PUBLIC CHARITY	5,000.
NEW DIRECTIONIS DOMESTIC ABUSE SHELTER OF KNOX CO. PO BOX 453 MTERNON, OH 43050	NONE SUPPORT FOR OPERATIONS	PUBLIC CHARITY	7,500.
NEWARK CAMPUS DEVELOPMENT FUND PO BOX 4217 NEWARK, OH 43058	NONE SCHOLARSHIP SUPPORT	PUBLIC CHARITY	300.
ORANGE COUNTY FIREFIGHTERS MUSEUM PO BOX 388 MONTGOMERY, OH 12549	NONE GENERAL SUPPORT	PUBLIC CHARITY	500.

THE LONGABERGER FOUNDATION C/O RACHEL L.			31-1575931
PERRYTON CHURCH OF CHRIST 6202 LICKING VALLEY ROAD FRAZEYSBURG, OH 43822	NONE SUPPORT OF PROGRAMS	PUBLIC CHARITY	2,000.
POLICE ATHLETIC LEAGUE OF ZANESVILLE PO BOX 1001 ZANESVILLE, OH 43701	NONE OPERATIONS	PUBLIC CHARITY	500.
PUTNAM UNDERGROUND RAILROAD EDUCATION CENTER 522 WOODLAWN AVENUE ZANESVILLE, OH 43701	NONE OPERATIONS	PUBLIC CHARITY	500.
SIX COUNTY, INC 2845 BELL STREET ZANESVILLE, OH 43071	NONE SUPPORT FOR OPERATIONS	PUBLIC CHARITY	5,000.
THE COLUMBUS PARTNERSHIP 41 SOUTH HIGH STREET. STE 1200 COLUMBUS, OH 43215	NONE PROGRAM SUPPORT	PUBLIC CHARITY	50,000.
THE WORKS PO BOX 721 NEWARK, OH 43055	NONE SUPPORT FOR SCIENCE, TECHNOLOGY, ENG. & MATHEMATICS	PUBLIC CHARITY	10,000.
TRANSITIONS INC DOMESTIC VIOLENCE SHELTER PO BOX 226 ZANESVILLE, OH 43701	NONE OPERATIONS/PROGRAMS	PUBLIC CHARITY	15,000.
UNITED NEGRO COLLEGE FUND 399 EAST MAIN STREET COLUMBUS, OH 43215	NONE CENTRAL OHIO AREA CAMPAIGN	PUBLIC CHARITY	500.
UNITED WAY OF MUSKINGUM, PERRY AND MORGAN COUNTIES 526 PUTNAM AVENUE ZANESVILLE, OH 43701	NONE ANNUAL CAMPAIGN	PUBLIC CHARITY	5,000.
UNITED WAY OF MUSKINGUM, PERRY AND MORGAN COUNTIES 526 PUTNAM AVENUE ZANESVILLE, OH 43701	NONE MUSKINGUM COUNTY HUNGER NETWORK	PUBLIC CHARITY	25,000.

THE LONGABERGER FOUNDATION C/O RACHEL L.			31-1575931
UTICA VOLUNTEER FIRE DEPT & EMS 22 SPRING STREET UTICA, OH 43080	NONE EQUIPMENT PURCHASE	PUBLIC CHARITY	1,000.
VILLAGE OF DRESDEN 904 CHESTNUT STREET DRESDEN, OH 43821	NONE POLICE DEPT SUPPORT	PUBLIC CHARITY	1,000.
WREATHS ACROSS AMERICA PO BOX 4175 NEWARK, OH 43058	NONE LICKING COUNTY CEREMONY	PUBLIC CHARITY	150.
ZANESVILLE CONCERT ASSOCIATION 2620 DOUGLAS DRIVE - ZANESVILLE, OH 43701	NONE SUPPORT FOR CONCERT SERIES	PUBLIC CHARITY	400.
ZANESVILLE MUSEUM OF ART 620 MILITARY ROAD ZANESVILLE, OH 43027	NONE OPERATIONS	PUBLIC CHARITY	1,000.
TOTAL TO FORM 990-PF, PART XV, LINE 3A			405,000.