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Form 990-PF

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

2009

OMB No 1545-0052

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

Fo	r cal	enda	year 2009, or ta	x year beginning		, 2009	, and ending			•	
G	Che	ck al	I that apply:	Initial return Init	al Return o	f a former p	ublic charity			Fin	al return
			Γ	Amended return	ſ	Address	change	Nan	ne c	hange	
	Use th	ne T							Α	Employer identification nu	mber
IF.	RS lab	el. 📘		te Family Found	dation					32-0050835	
01	herw print			cond Street					В	Telephone number (see the	instructions)
	or typ	e. '	Pass Christ	tian, MS 39571						<u>228-575-3119</u>	
	e Spe tructi								С	If exemption application is	• •
									ŧ	1 Foreign organizations, che	
Н	C		type of organiza							2 Foreign organizations mee here and attach computation	
-				nonexempt charitable t		thod. X C	orivate found	ation crual	Ε	If private foundation status	s was terminated
•			ket value of all assets rt II, column (c), line		Other (specify		asii Mac	cruai	_	under section 507(b)(1)(A	
	► s		2,089,	· <u> </u>			n cash basis)	;	F	If the foundation is in a 60 under section 507(b)(1)(B	
Pa	ırt İ	A	nalysis of Re						-4		
<u>تـــت</u> ا		_ E>	kpenses (The	total of amounts in		enue and per books	(b) Net inv incor		nt	(c) Adjusted net income	(d) Disbursements for charitable
				and (d) may not neces- nounts in column (a)							purposes
			ee the instruction								(cash basis only)
		1		grants, etc. received (att sch).							ŀ
		2		undn is not req to att Sch B							
		3	Interest on savi cash investmen	ngs and temporary		11,592.	1	1,59	2.	11,592.	Í
		4	Dividends and interest			56,453.	5	6,45	3.	56,453.	
			Gross rents.								
		b	Net rental income or (loss)								
	R			sale of assets not on line 10	-2	08,399.					
G	٧		Gross sales price for assets on line 6a		*				_		
SCANNED	E>ENUE	8	Capital gain net inco Net short-term	me (from Part IV, line 2).			 ,		0.		
	Ü	9	Income modific	•							
2	E	_	Gross sales less returns and		-						
6			allowances							*	
		_	Less Cost of goods sold								
AON			Gross profit/(loss)	•							× '
(=-		11	Other income (a	attach schedule)							
©		12	Total. Add lines	s 1 through 11	-1	40,354.	6	8,04	5.	68,045.	· · · · · · · · · · · · · · · · · · ·
	-	13		cers, directors, trustees, etc		0.		7070.		007010.	
กเกิ		14	Other employee sala	aries and wages.							
				employee benefits							
	A D		Legal fees (attach s			1 005					
	M		-	tach sch) See St 1		1,235.				-	
0	Ņ.		: Other prof fees (atta Interest	acn scn)	. –					050	
P	S T	17 18	Taxes (attach scheduleXse	e instr) See Stm 2		1,133.				- REC	EIVED
OPERAT	R	19	_ ' ''	—		1,155.					S
7	A T I		sch) and deplet	tion						E NOV 1	5 2010 O
N G	V	20 21	Occupancy	nces, and meetings					_	0 10 1	
Α		22	Printing and pu							0001	الم الم
A N D	X	23		s (attach schedule)							N, UT
	E N		S	ee Statement 3		25,149.	2	25,14	19.		7-21
	EXPERSES	24	Total operating	and administrative		27,517.	2	25,14	اما		
	S	25	Contributions aifts	lines 13 through 23 grants paid Part XV	1	$\frac{27,317.}{15,250.}$.,14	٠,٠	-	115,250.
		26		and disbursements.							
			Add lines 24 an	nd 25	1	42,767.	2	25,14	١9.	0.	115,250.
		27				=					,
		а	Excess of reveral and disbursem	nue over expenses ents	-2	83,121.					
		b		me (if negative, enter -0-)		-,- <u></u>	4	12,89	<u>6</u> .		
		c	Adjusted net income	e (if negative, enter -0-)						68,045.	
BA	A F	or Pr	ivacy Act and Pa	aperwork Reduction Ad	t Notice, s	ee the instru	ıctions.		TEE	A0504L 02/02/10	Form 990-PF (2009)

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 φ

1,974,300. 4 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 1,974,300. 6

,	(a) List and describe 2-story brick warehous	e the kınd(s) of property sold (e g , r se; or common stock, 200 shares ML		(b) How acq P — Purch D — Dona	ase	(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a Merrill Lynch-Securities P						Various	Various
	Merrill Lynch-CG Di			P		Various	Various
	1						
e	•						
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basi plus expense of sale		(h) Gain or (loss) (e) plus (f) minus (g)		
а	1,341,042.		1,555	,541.			-214,499.
ь	6,100.						6,100.
C	:						
c	1						
е							
	Complete only for assets show	ng gain in column (h) and owned by	the foundation on 12/31/69			(I) Gains (Colu	mn (h)
	(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column over column (j), if any	(i) y		ain minus column (k in -0-) or Losses (fr	
а	1						-214,499.
b)						6,100.
C							
d	I						
е	•						
	Capital gain net income or (net	If (loss), en	enter in Part I, line 7 ter -0- in Part I, line 7		2		-208,399.
3	Net short-term capital gain or (loss) as defined in sections 1222(5)	and (6)]		
		8, column (c) (see the instructions)	. If (loss), enter -0-		ا ء		0
Par	in Part I, line 8	Section 4940(e) for Reduce	d Tax on Not Investmen	-1	3		0.
	es,' the foundation does not qual	tion 4942 tax on the distributable am ify under section 4940(e) Do not con each column for each year; see th	mplete this part	<u>. </u>		Yes	X No
		(b)		any entire	<u> </u>	(4)	
	(a) Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	(c) Net value of noncharitable-use asse	ets	(colu	(d) Distribution imn (b) divided l	ratio by column (c))
	2008	108,000.	2,152	,073.			0.050184
	2007	47,100.	2,317				0.020326
	2006	38,400.	987	,117.			0.038901
	2005	23,400.	379	,992.			0.061580
	2004	32,950.	118	,947.			0.277014
2	Total of line 1, column (d)				2		0.448005
	Average distribution ratio for the	e 5-year base period — divide the to has been in existence if less than 5	tal on line 2 by 5, or by the		3		0.089601
_	·			İ			
4	Enter the net value of nonchari	table-use assets for 2009 from Part	X, line 5	-	4		,881,881.
5	Multiply line 4 by line 3			-	5		168,618.
6	Enter 1% of net investment inco	ome (1% of Part I, line 27b)		-	6		429.
7	Add lines 5 and 6				7		169,047.
8	Enter qualifying distributions from	om Part XII, line 4			8		115,250.
_	If line 8 is equal to or greater the Part VI instructions	nan line 7, check the box in Part VI,	line 1b, and complete that pa	art using a	a 1%	tax rate See th	e

		005083			Page 4
Par	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see	the instr	uctions	<u>i) </u>	
1:	a Exempt operating foundations described in section 4940(d)(2), check here ■				
	Date of ruling or determination letter: (attach copy of letter if necessary - see instr.)				
I	Domestic foundations that meet the section 4940(e) requirements in Part V,	1			<u>858.</u>
	check here. ►and enter 1% of Part I, line 27b				
•	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (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			<u>858.</u>
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			<u>858.</u>
6	Credits/Payments:				
i	2009 estimated tax pmts and 2008 overpayment credited to 2009 6a 7, 640.				
	Exempt foreign organizations – tax withheld at source				
	Tax paid with application for extension of time to file (Form 8868)				
	Backup withholding erroneously withheld 6d				
7	Total credits and payments Add lines 6a through 6d	7		<u> 7, (</u>	<u>640.</u>
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		<u>6,</u>	782.
11	Enter the amount of line 10 to be Credited to 2010 estimated tax	11			<u>0.</u>
Par	t VII-A Statements Regarding Activities			т	Τ
1 a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it		<u> </u>	Yes	_
	participate or intervene in any political campaign?		1 a	+	X
ŀ	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?		16		v
			10	7 %	X
	If the answer is 'Yes' to 1a or 1b , attach a detailed description of the activities and copies of any materials pull or distributed by the foundation in connection with the activities	olished			
	Did the foundation file Form 1120-POL for this year?		1 c		X
•	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	.	1	3 %
•	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed of		一		
	foundation managers \blacktriangleright \$0.				
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		2	<u> </u>	X
	If 'Yes,' attach a detailed description of the activities.				6 53
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles	i			
	of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		3	<u> </u>	X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a	-	X
t	If 'Yes,' has it filed a tax return on Form 990-T for this year?		4ь	N	/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5	<u> </u>	X
	If 'Yes,' attach the statement required by General Instruction T		i	\	
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 co	nflict			<u>-</u>
-	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, column (c), and Part XV Enter the states to which the foundation reports or with which it is registered (see the instructions)		7	Х	<u> </u>
O a	MS				
t	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 for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If 'Yes,' complete	4942())(5)	<u> </u>	
			/ 9	 	X
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their na and addresses.	ames	10		х
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			-		,

Forn	990-PF (2009) The Burdette Family Foundation	32-005	50835	F	age 5
Par	t VII-À 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		Х
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?		12		Х
13	Did the foundation comply with the public inspection requirements for its annual returns and exempti	on application		Х	
	Website address • N/A				
14	The books are in care of Martha Burdette Telephon				
	Located at ► 1201 E. Second St. Pass Christian MS ZIP + 4				
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here	1 *1	.N/A		
Dor	and enter the amount of tax-exempt interest received or accrued during the year	▶ 15			N/A
rar	t VII-B Statements Regarding Activities for Which Form 4720 May Be Required			V	
1.	File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.			Yes	No
1 8	During the year did the foundation (either directly or indirectly):		N -		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes X	NO		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes X	No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	_ = =	No		ľ
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes X	L L		1
					1
	(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 X	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 X	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 the instruc	1 tions)?	1 b	N	/A
	Organizations relying on a current notice regarding disaster assistance check here	▶ 🗌		-	
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?	5,	1 c	***************************************	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 $4942(j)(5)$)				
а	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 X	No		
	If 'Yes,' list the years 20, 20, 20				- Land
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 494 (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942 all years listed, answer 'No' and attach statement — see the instructions)		2b	 N	/A
c	of the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years	s here	20	11/	<u> </u>
	► 20, 20, 20, 20				
2.					-
Sa	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	Yes X	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 approv	/ed			1
	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).		3b	N	 /a
4 a	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		<u> X</u>
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Part VII-B Statements Regarding Activit		1 4720 May Be Req	uired (continued)			1
5a During the year did the foundation pay or incu(1) Carry on propaganda, or otherwise attempt	•	on (section 4945(e))?	Yes X	No		
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	☐ Yes [X	No No				
(3) Provide a grant to an individual for travel,		purposes?	Yes X	4		
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	han a charitable, etc, o 4940(d)(2)? (see instr	rganization described uctions)	Yes X] No		
(5) Provide for any purpose other than religio educational purposes, or for the prevention	us, charitable, scientific on of cruelty to children	c, literary, or or animals?	Yes X] No		
b If any answer is 'Yes' to 5a(1)-(5), did any of described in Regulations section 53 4945 or in (see instructions)?	the transactions fail to a current notice regard	qualify under the excep ding disaster assistance	tions	5	b N	/A
Organizations relying on a current notice rega	rding disaster assistan	ce check here	▶]		
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon	sibility for the grant?	•	N/A Yes] No		
If 'Yes,' attach the statement required by Regi		• ,				
6a Did the foundation, during the year, receive at on a personal benefit contract?			∐Yes X]No 6		 X
b Did the foundation, during the year, pay prem <i>If 'Yes' to 6b, file Form 8870.</i>	-				D	
7a At any time during the tax year, was the found				No		1/3
Part VIII Information About Officers, D and Contractors				7 Employed		/A
1 List all officers, directors, trustees, foundation	n managers and their	compensation (see inst	ructions).			
(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) Exper other a		
Ernest Burdette	President	0.	0.			0.
522 E. Railroad Avenue Long Beach, MS 39560	0					
Martha Burdette	Secretary/Tr	0.	0.			0.
522 E. Railroad Avenue Long Beach, MS 39560	0					
					<u> </u>	
2 Compensation of five highest-paid employee					_	
(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) Exper other a	ise acc Ilowan	ces
None			compensation	-		
				<u> </u>		
Total number of other employees paid over \$50,000)					
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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid and Contractors (continued)	Employees,
3 Five highest-paid independent contractors for professional services – (see instructions). If none, enter 'NONE.'	
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
None	
Total number of others receiving over \$50,000 for professional services	0
Part IX-A Summary of Direct Charitable Activities	
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 <u>N/A</u>	-
2	
	-
3	-
4	
	-
Part IX-B Summary of Program-Related Investments (see instructions)	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 1 N/A	Amount
	-
2	
All other program-related investments See instructions	
3	-
Total. Add lines 1 through 3	0.
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Par	TX Minimum Investment Return (All domestic foundations must complete this part. For see instructions.)	oreigr	foundations,
1 a	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes Average monthly fair market value of securities	ئئــ 1 a	1,776,062.
	Average of monthly cash balances	1 b	134,477.
C	Fair market value of all other assets (see instructions)	1 c	
	Total (add lines 1a, b, and c)	1 d	<u>1,910,539.</u>
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	<u> </u>
3	Subtract line 2 from line 1d	3	1,910,539.
4	Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions).	4	28,658.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,881,881.
6	Minimum investment return. Enter 5% of line 5	6	94,094.
Par	· · · · · · · · · · · · · · · · · · ·		foundations
	and certain foreign organizations check here ► and do not complete this pa	rt.)	
		1	94,094.
2 a	Tax on investment income for 2009 from Part VI, line 5]	
Ŀ	Income tax for 2009 (This does not include the tax from Part VI)] .	
c	: Add lines 2a and 2b	2c	858.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	93,236.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	93,236.
6	Deduction from distributable amount (see instructions)	6	
	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	93,236.
Par	t XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:	<u> </u>	
а	Expenses, contributions, gifts, etc - total from Part I, column (d), line 26	1 a	115,250.
b	Program-related investments – total from Part IX-B	16	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2	
3 a	Amounts set aside for specific charitable projects that satisfy the Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3ь	
4	Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	115,250.
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 (see instructions)	5	
	Adjusted qualifying distributions. Subtract line 5 from line 4	6	115,250.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whet qualifies for the section 4940(e) reduction of tax in those years	ther the	e foundation

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Part XIII Undistributed Income (see instructions)

1 Distributable amount for 2009 from Part XI, Inter State and Part XI, Inter Amount for 2008 only betalf for proyens: 20 _ 20 _ 20 _ 3		(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
2 Unidisthated mome, if any, as of the end of 2009, a Enter amount for 2009 only b Total for prior years: 29 _ 29 _ 20 _ 0. 3 Excess distributions carpyower if any, to 2009. 3 Excess distributions carpyower to 2009 from Pat A 11, 880, b From 2006					93 236
a Enter amount for 2008 only b 10td for piner years: 20, 20					
b Teals for per years: 20 _ 30 _ 30 3 Excess distributions carryees, if any, is 2009. a From 2004	· · · · · · · · · · · · · · · · · · ·			0.	
3 Excess distributions carryover, if any, to 2009. a From 2005	-		0.		
a From 2004 b From 2005 c From 2006 d From 2007 e From 2008 1, 524. f Total of lines 3a through e 4 Qualifying distributions for 2009 from Part XII, line 4 ★ \$ 115, 250. a Applied to 2008, but not more than line 2a b Applied to 2008, but not more than line 2a b Applied to 2008, but not more than line 2a c Treated a distributions out of corpus c Clelection required — see instructions) d Applied to 2009 distributable amount e Remaining amount distributable amount e Remaining amount distributable amount e Remaining amount distributable amount e Remaining amount distributable out of corpus 5 Exess distributions carryover applied to 2009 (if an amount appears in column (a), the same amount must be shown in columna (a), 6 Enter the net total of each column as indicated below: a Cupps. Add lines 31, 4, and 4e Subtract line 5 b Prior years' undistributed income Subtract line 4b from line 2b c Enter the amount of prior years' undistribute- ed income for which a notice of deficiency has been issued, or on which the section 494(a) tax has been previously assessed d Subtract line 6e from line 6b T avable amount — see instructions 0. d Subtract line 6e from line 6b T avable amount — see instructions 0. d Indistributed income for 2008 Subtract lines 4d and 5 from line 1. This amount must be distributed in z010 7 Amounts treated as distributions out of corpus to safely requirements imposed (see instructions) 9 Excess distributions carryover from 2004 (see instructions) 11, 880. 9 Excess distributions carryover from 2004 (see instructions) 11, 880. 9 Excess from 2005 12, 524. 12, 524. 18, 003. 18, 003. 18, 003. 18, 003. 18, 003. 19, 003. 19, 003. 20, 111, 880. 20, 11, 880.					
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From 2008					
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4 Qualifying distributions for 2009 from Part XII, line 4 P \$ 115, 250. a Applied to 2008, but not more than line 2a	<u>-</u>	18,003.			
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Inine 2a Taxable amount — see instructions 0			0.		
Inine 2a Taxable amount — see instructions 0	e Undistributed income for 2008 Subtract line 4a from			i	
4d and 5 from line 1. This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions) 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 28,137. 10 Analysis of line 9. a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 e Excess from 2009 22,014.		,		0.	
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10 Analysis of line 9. a Excess from 2005		28 137			
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b Excess from 2006 c Excess from 2007 d Excess from 2008 1,524. e Excess from 2009 22,014.	- I				
c Excess from 2007 d Excess from 2008 1,524. e Excess from 2009 22,014.					
d Excess from 2008 1,524. e Excess from 2009 22,014.					
e Excess from 2009 22, 014.					
		<u> </u>			Form 990-PF (2009)

n 990-PF (2009) The Burdette Fam: t XIV Private Operating Foundation			/II-A, question 9)	32-0050835	N/A
a If the foundation has received a ruling or o	etermination letter				
is effective for 2009, enter the date of the		rating foundation :	acaribad in asstran	1042(1)(2) 2=	4942(1)(E)
b Check box to indicate whether the foundat		erating foundation of		4942(j)(3) or	4942(j)(5)
a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year (a) 2009	(b) 2008	Prior 3 years (c) 2007	(d) 2006	(e) Total
investment return from Part X for each year listed	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
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					
Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
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					
t XV Supplementary Information			organization had	d \$5,000 or mor	e in
assets at any time during th Information Regarding Foundation Managa List any managers of the foundation who have close of any tax year (but only if they have	ers:	ore than 2% of the	total contributions rec	ceived by the found	fation before the
See Statement 4	Contributed more	(1011 40,000)	30011011 307 (4)(2))		
b List any managers of the foundation who o	wn 10% or more o	of the stock of a cor	poration (or an equal	ly large portion of t	the ownership of
a partnership or other entity) of which the None	foundation has a 1	0% or greater inter	est	ly large pertion of	owneren p
Holic					
Information Regarding Contribution, Gran	t, Gift, Loan, Scho	larship, etc, Progra	ıms:	-	
Check here I if the foundation only managements for funds If the foundation makes	nakes contributions	to preselected cha	rıtable organızatıons		
complete items 2a, b, c, and d The name, address, and telephone numbe	r of the person to	whom applications	should be addressed		
a The hame, address, and telephone hambe	or the person to	ипот аррисатота	silouiu de dudi esdeu		
See Statement 5					
b The form in which applications should be s	submitted and info	mation and materia	ls they should includ	e-	
See Statement for Line 2a					
c Any submission deadlines:					
See Statement for Line 2a					
d Any restrictions or limitations on awards, s	uch as by geograp	hical areas, charita	ble fields, kinds of in	stitutions, or other	factors.
•					
See Statement for Line 2a	.				000 PF (0000
A	TO	EA0310L 07/06/09		F	orm 990-PF (2009)

3	3 Grants and Contributions Paid During the Year or Approved for Future Payment								
	Recipient		Foundation status of recipient		Amount				
	Name and address (home or business)	substantial contributor	recipient						
z See	Paid during the year Statement 6								
		-							
	Total			► 3a	115,250.				
t	Approved for future payment								
					-				
	Total			► 3b					

Part XVI-A Analysis of Income-Producing Activities

inter gross amounts unless otherwise indicated.	Unrelated I	business income	Excluded by	section 512, 513, or 514	
Program service revenue	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	(e) Related or exempt function income (see the instructions
a					
b					
c					
d					
e					
f					-
g Fees and contracts from government agencies		-			
2 Membership dues and assessments					-
3 Interest on savings and temporary cash investments			14	11,592.	
4 Dividends and interest from securities			14	56,453.	
5 Net rental income or (loss) from real estate:		9 (All 1987)			3
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income				. —	
8 Gain or (loss) from sales of assets other than inventory					-208,399
9 Net income or (loss) from special events					
Gross profit or (loss) from sales of inventory			1		· <u>-</u>
1 Other revenue					/
a					
b					
c					
d	_			-	
e					. <u></u>
2 Subtotal Add columns (b), (d), and (e)				68,045.	-208,399
3 Total. Add line 12, columns (b), (d), and (e)				13	-140,354
See worksheet in the instructions for line 13 to verify o	alculations)			•	

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) (See the instructions)
N/A	
	
	

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

_			<u> </u>										-,
	desci	ne organization ribed in section ng to political o	501(c) c	of the Code (c	engage in an other than se	y of the follo	owing with (3) organiz	any o zations	ther organization	on 527,		Yes	s No
a Transfers from the reporting foundation to a noncharitable exempt organization of									, .	^ _			
(1) Cash								1a (1	X			
(2) Other assets									1a (2)	X		
b Other transactions.													
(1) Sales of assets to a noncharitable exempt organization									1b(1)	Х		
	(2) Purchases of assets from a noncharitable exempt organization									1b(2)	Х	
	(3) Rental of facilities, equipment, or other assets									1b(3)	X	
(4) Reimbursement arrangements									1b(-	Х		
(5) Loans or loan guarantees									1b(X		
	(6) Performance of services or membership or fundraising solicitations									1b(X	
	• •	ng of facilities,			•	•		es			1c	_	X
	d If the the g any t	answer to any oods, other ass ransaction or st	of the a ets, or s naring ar	bove is 'Yes,' ervices given rrangement, s	complete th by the repo show in colur	e following s rting foundat nn (d) the va	schedule (non If the alue of the	Columi founda goods	n (b) should alvation received s, other assets,	ways show th less than fai or services	ne fair market v r market value received	/alue o	f
(a) Line no	(b) Amount in			of noncharitable				Description of trai				
N	/A												
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		foundation dire ibed in section s,' complete the			ated with, or ther than se	related to, oction 501(c)(one or mo 3)) or in s	re tax- ection	exempt organi. 527?	zations	Y	es X	No
_		(a) Name of or	ganızatı	on	(b)	Type of orga	nızatıon		(c	:) Description	of relationshi	<u> </u>	
N	/A												
_													
_													
_				_	ļ								
_	I				<u> </u>	 					<u> </u>		
s	complete	Inder penalities of perjury, I declare that I have examined the complete Declaration of preparer (other than taxpayer or fine that the complete Declaration of preparer (other than taxpayer or fine that the complete Declaration of preparer (other than taxpayer or fine that the complete Declaration of preparer (other than taxpayer or fine that the complete Declaration of preparer (other than taxpayer or fine that the complete Declaration of preparer (other than taxpayer or fine that the complete Declaration of preparer (other than taxpayer or fine that the complete Declaration of preparer (other than taxpayer or fine that the complete Declaration of preparer (other than taxpayer or fine that taxpayer or fine taxpay				ng accompanyin on all informatio	g schedules a on of which pr	eparer h	ments, and to the bas any knowledge N. 9, 2010	> TRU:		true, cor	rect, and
G N	Signi	ature of officer of	stee /					Date	· · · · · · · · · · · · · · · · · · ·	Title			
HERE	Paid Pre-	Preparer's signature	Near	DIXAG	·CRA			Date	. / /	Check if self- employed	Preparer's Iden (See Signature N/A	in the ins	mber strs)
E	parer's	Firm's name (er	King,	Lejeune	& Schm	itt, LLC			/ 7	EIN ► N	/A		
	Use Only	yours if self-		Grandpre									-
_		address, and ZIP code	Bator	n Rouge,	LA 70802	2				Phone no	(225) 38	7-11	00
В	AA										Form	990-PF	(2009)

				
2009	Federal Statements	Page 1		
Client 1296	The Burdette Family Foundation	32-0050835		
10/28/10		06 27PM		
Statement 1 Form 990-PF, Part I, Line 16b Accounting Fees				
Accounting & Tax Prep Fees	(a) (b) Net (c) Expenses Investment Adjusted per Books Income Net Income Total \$ 1,235. \$ 0. \$ 0. \$ 0.	(d) Charitable Purposes \$ 0.		
Statement 2 Form 990-PF, Part I, Line 18 Taxes	· · · · · · · · · · · · · · · · · · ·			
Other Taxes	(a) (b) Net (c) Expenses Investment Adjusted Income Net Income \$ 1,133. \$ 1,133. \$ 0.	(d) Charitable Purposes \$ 0.		
Statement 3 Form 990-PF, Part I, Line 23 Other Expenses				
Investment Fees	(a) (b) Net (c) Expenses Investment Adjusted per Books Income Net Income Total \$ 25,149. \$ 25,149. \$ 25,149. \$ 25,149. \$ 0.	(d) Charitable Purposes \$ 0.		
Statement 4 Form 990-PF, Part XV, Line 1a Foundation Managers - 2% or Mo Ernest Burdette Martha Burdette	ore Contributors			
Statement 5 Form 990-PF, Part XV, Line 2a-d Application Submission Informat	ion			
Name of Grant Program: Name: Care Of: Street Address: City, State, Zip Code: Form and Content: Written explanation of program with outline of proposed fund usage. Submission Deadlines: N/A The Burdette Family Foundation Martha Burdette Family Foundation Martha Burdette Foundation Martha Burdette Family Foun				

2009 '	Federal Sta	Page 2		
lient 1296	The Burdette Fami			
Statement 5 (continued) Form 990-PF, Part XV, Line 2a-d Application Submission Informa	tion			06 27F
Restrictions on Awards:	N/A			
Statement 6 Form 990-PF, Part XV, Line 3a Recipient Paid During the Year				
Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
Gaits to Success P.O. Box 150 Kiln, MS 39556	No relation		To provide wholesome relief and opportunities to individuals with disabilities.	\$ 2,000
Mercy Angel Flight Southeast, Inc. 8864 Airport Blvd. Leesburg, FL 34788	No relation	Pub Chrty	To provide resources to assist in accomplishment of mission of providing medical transportation to the needy.	5,000
The Salvation Army 2111 24th Ave. Gulfport, MS 39501	No relation	Pub Chrty	To provide donee with funds to assist needy and promote christian outreach programs.	4,500
Habitat for Humanity 1400 Legget Drive Biloxi, MS 39530	No relation	Pub Chrty	To provide the donee with funds to assist those in need of shelter with building materials.	3,000
Nature Conservency 4245 North Fairfax Drive, Suite 100 Arlington, VA 22203	No relation	Pub Chrty	To promote environmental conservation programs in the U.S.	4,000

2009`	Federal Sta	 Page 3		
Client 1296	The Burdette Famil	32-0050835		
10/28/10		<u>,, , , , , , , , , , , , , , , , , , ,</u>		 06 27PM
Statement 6 (continued) Form 990-PF, Part XV, Line 3a Recipient Paid During the Year				
Name and Address	Donee <u>Relationship</u>	Found- ation Status	Purpose of Grant	 Amount
Push Push Theater Foundation 121 New Street, #4 Decatur, GA 30030	No relation	Pub Chrty	To promote the arts in local community.	\$ 17,000.
Trinity Church 125 Church Ave Pass Christian, MS 39571	No relation	Ex Chrch	To fund church rebuilding efforts in wake of hurricane and religious outreach.	17,300.
Gulf Coast Health Educators 913 E. Second St Pass Christian, MS 39571	No relation	Pub Chrty	To fund health education programs to poor and elderly.	3,000.
SouthFace Institute 241 Pine Street NE Atlanta, GA 30308	No relation	Pub Chrty	To fund energy conservation programs.	5,000.
Coast Episcopal School 5065 Espy Ave. Long Beach, MS 39560	No relation	Ex Chrch	School capital campaign used to improve facilities damaged in storms.	10,000.
Humane Society of South Mississippi 2615 Highway 49 Gulfport, MS 39501	No relation	Pub Chrty	To promote ethical treatment of animals and improve shelter conditions.	2,000.
Our Little Roses Foreign Mission Society P.O. Box 464 Sommerset, VA 22972	No relation	Ex Chrch	To assist South American mission and poverty programs.	3,500.
Memorial Hospital of Gulfport Fdn P.O. Box 940 Gulfport, MS 39502	No relation	Pub Chrty	Unresticted gift to promote good health programs.	1,000.
Decatur Preservation Alliance 920 Scott Blvd Decatur, GA 30030	No relation	Pub Chrty	To assist in preservation efforts of Decatur Georgia.	2,000.

2009 .	Federal Sta	Page 4		
Client 1296	The Burdette Fami	32-0050835		
Statement 6 (continued) Form 990-PF, Part XV, Line 3a Recipient Paid During the Year				06 27PM
Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	 Amount
Camp Twin Lakes P.O. Box 933507 Atlanta, GA 31193	No relation	Pub Chrty	To provide camp opportunities for childern with disabilities.	\$ 2,500.
Camp Dream Street 3863 Morrison Road Utica, MS 39175	No relation	Pub Chrty	To provide camping opportunities for kids with disabilities.	1,000.
Pass Christian Public Library 327 E. 2nd Street Pass Christian, MS 39571	No relation	Muni	Support library capital improvments and update stacks.	2,200.
Mississippi Food Network P.O. Box 411 Jackson, MS 39205	No relation	Pub Chrty	Food bank for those in need.	1,000.
Little Five Points Community Center 1083 Austin Ave. NE Atlanta, GA 30307	No relation	Pub Chrty	To house and facilitate the health of various non-profit organizations	500.
WRFG Public Radio 1083 Austin Ave. NE Atlanta, GA 30307	No relation	Pub Chrty	Public radio broadcasting.	500.
St. Jude Childern's Reserach Hospital 262 Danny Thomas Place Memphis, TN 38105	No relation	Pub Chrty	To assist in medical research and medical care for childern.	2,000.
Hope Haven Childern's Services P.O. Box 3777 Bay St. Louis, MS 39521	No relation	Pub Chrty	Gift to assist in placement of childern to foster families.	2,000.
Smile Train P.O. Box 96231 Washington , DC 20090	No relation	Pub Chrty	Unrestricted gives to organization to provide corrective surgery to childern with cleft issues.	1,000.

2009	Federal Stat	Page 5		
Client 1296	The Burdette Family	32-0050835		
Statement 6 (continued) Form 990-PF, Part XV, Line 3a Recipient Paid During the Year				06 27PM
Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
Center for Prevention of Child Abuse 2315 17th Street Gulfport, MS 39501	No relation	Pub Chrty	To promote protection of childern endangered by child abuse.	\$ 2,000.
American Heart Association 2159 E. Pass Road Unit A Gulfport, MS 39507	No relation	Pub Chrty	Unrestricted gift to fund medical reserach.	250.
Slow Food Atlanta-GA Flooded Farm Relief P.O. Box 2641 Smyrna, GA 30081	No relation	Pub Chrty	Gift to assist farmers recover by floods that impacted crops in 2009.	5,000.
Lynn Meadows Discovery Center 246 Dolan Ave Gulfport, MS 39507	No relation	Pub Chrty	Unrestricted gift for education.	2,000.
Our Mother of Mercy Catholic Church 216 Saucier Ave. Pass Christian, MS 39571	No relation	Ex Chrch	Funds for food drive.	2,000.
ALS Foundation P.O. Box 96 Natick, MA 01760	No relation	Pub Chrty	Support of research and cure for ALS.	1,000.
Boys & Girls Clubs of the Gulf Coast 11975 A160 Seaway Road Gulfport, MS 39503	None	Pub Chrty	Promote childern education programs.	3,000.
Unitarian Universalist Church 25 Beacon Street Boston , MA 02108	No relation	Ex Chrch	To promote religious outreach.	2,000.
American Cancer Society 417 Security Sq. Gulfport, MS 39503	No relation	Pub Chrty	To assist in medical reserach to stop cancer.	6,000.
			Total	\$ 115,250.

Form 8868	3 (Rev 4-2009)		Page 2						
	are filing for an Additional (Not Automatic) 3-Month Extension, complete only		LI						
	complete Part II if you have already been granted an automatic 3-month external	•	sly filed Form 8868						
	are filing for an Automatic 3-Month Extension, complete only Part I (on page		(a						
Part II	Additional (Not Automatic) 3-Month Extension of Time. Only Name of Exempt Organization								
	Name of Exempt Organization		Employer identification number						
Type or	The Purdette Family Foundation	ļ	22 0050025						
print	The Burdette Family Foundation Number, street, and room or suite number If a PO box, see instructions	l F	32-0050835 For IRS use only						
File by the			roi ins use only						
extended due date for	King, Lejeune & Schmitt, LLC	_ [
filing the return See	331 Grandpre Street City, town or post office, state, and ZIP code For a foreign address, see instructions	-							
instructions	Baton Rouge, LA 70802								
Chack type	e of return to be filed (File a separate application for each return).	<u> </u>							
Form 9		Form 1041-A	□ Form 6060						
Form 9		Form 4720	Form 6069						
Form 9		Form 5227	☐ Form 8870						
	not complete Part II if you were not already granted an automatic 3-month ex		usly filed Farm 9959						
	oks are in care of Martha Burdette	dension on a previo	busiy iiled Form 8868.						
	one No. FAX No								
	organization does not have an office or place of business in the United States,	chack this box	⊾ □						
	s for a Group Return, enter the organization's four digit Group Exemption Num		If this is for the						
	ip, check this box ☐ If it is for part of the group, check this box ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐ ☐								
_	the extension is for	and attach a list with	in the hames and this of all						
	uest an additional 3-month extension of time until $11/15$, 20 1	<u> </u>							
5 For c	alendar year 2009 or other tax year beginning 20	ond ending	20						
6 If this	alendar year 2009, or other tax year beginning , 20 s tax year is for less than 12 months, check reason. Initial return	Final return	Change in accounting period						
7 State	e in detail why you need the extension <u>Additional information</u>	n is necessar	to file a complete						
	accurate return.		T colling a complete						
7.7.2									
8a If this	s application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tenta	atus tay loss any							
nonre	efundable credits. See instructions.	nive lax, less any	8a \$ 0.						
b If this	s application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable co	redits and estimated	Itax						
pavm	nents made. Include any prior year overpayment allowed as a credit and any a Form 8868	mount paid previous	sly						
			8b\$ 7,640.						
c Balar with I	nce Due. Subtract line 8b from line 8a Include your payment with this form, or FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment)	r, it required, deposi System). See instra	t 8c \$ 0.						
	Signature and Verification								
Under penalty	Under penalties of penury A declare 14st I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I an authorized to prepare this form								
correct, and co	impleted and that I are authorized to prepare this form	ŕ							
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