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

OMB No 1545-0052

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 2009, and ending

For c	aler	ndar	year 2009, or	tax year beginnin	g		, 2009	, and ending			,	
GO	hec	k al	I that apply.	Initial return	Init	al Return o	f a former pi	ublic charity			Fina	al return
				Amended ret	urn	Γ	Address	rhanne Í	Nam	ne d	change	
				Amended ret				I I I		A	Employer identification num	nhar
	the		ML_ 1812.1.12	om F. Dwoll	a	Fligab	ath Trela	•	- !	^	• •	ibei
Othe	label			am F. Broll			eth Tyre	Ţ	- 1		33-0799181	<del></del>
	rint			ritable For	ındat.	LON			- 1	В	Telephone number (see the	instructions)
	ype.		P.O. BOX									
See S			Arnold, C	A 95223						С	If exemption application is	pending, check here 🕨 📗
Instru	CTIO	ns.							- 1	D	1 Foreign organizations, chec	k here
H	Che	eck	type of organiz	zation X Sec	tion 50	(c)(3) exem	npt private fo	oundation			2 Foreign organizations meet	ing the 85% test, check
				) nonexempt cha				rivate founda	tion		here and attach computation	n
	Fair		ket value of all ass		I Acc		thod: X C			E	If private foundation status	
•			rt II, column (c), II			Other (specify		usii	,	_	under section 507(b)(1)(A)	
	Ś			5,759.	L			cash basis)	+	F	If the foundation is in a 60 under section 507(b)(1)(B)	
10-3	<u> </u>	1 1			(raiti,	(Columnia (a)	illusi be on	Casii Dasis )		_	under section sov(b)(1)(b)	, check liefe
Part				Revenue and			enue and	(b) Net inve		nt	(c) Adjusted net	(d) Disbursements
			kpenses (In	ne total of amount and (d) may not	S IN neces	expenses	per books	incom	ne		ıncome	for charitable
		sa	rilv equal the a	amounts in colum	n (a)	]	'					purposes (cash basis only)
	_	(s	eé the instructi	ions) )								(cash basis chiy)
	T	1		is, grants, etc, received								
		2	Ck ► X if the	foundn is <b>not</b> req to a	tt Sch B							
∍		3	Interest on sa	avings and tempor								
21 97	-		cash investm									
<b>3</b>		4		terest from securities			10,962.	1	0,96	<u>2.</u>		
<b>⊸</b> ;	ı		Gross rents									
5	İ		<ul> <li>Net rental income or (loss)</li> </ul>	·					······································			
JUL VI	1			om sale of assets not o	n line 10	1	3,352.					
≓ E D v		E	Gross sales price assets on line 6a	for all17	<u>,297.</u>							
₹ E	}	7		ncome (from Part IV, II	ne 2)				3,35	2.		
N		8	Net short-term									
Σίδ		9	Income modif	fications								
Ų E		10 a	Gross sales less returns and									
DE BERNALD			anowances									
<u>~</u>		E	Less Cost of goods sold									
3		c	Gross profit/(los:	s) (att sch)								
รัก		11	Other income	(attach sche <u>dule</u>	<b>1</b>							
3,	-			,	RE							
	1	12	Total, Add Im	es 1 through 11.	115	OLIV L	14,314.	1	4,31	4.	0.	
	十	13	Compensation of	officers, directors, drus	tees, etc	<u> </u>	150.					<u> </u>
	-	14	Other employee s	alaries and wages	11.13	28 20	n Ö					
	-	15		s, employee bene	efits	7	थ					
	A		Legal fees (attacl		جيدسية في			· · · · · · · · · · · · · · · · · · ·				
	ĎΙ		Accounting fees (	(attach sch) See	6	DEM.	121.300		1,15	0.		1,150.
	M		Other prof fees (a		15.00		<del>=====================================</del>		<del>-,</del>	<u>.                                    </u>		
0	N	_	Interest	accaon song		<u> </u>						
O P F	SI	17		.v Coo !	Stm 2		411.	<del></del>			<del> </del>	25.
E R	R	18	Taxes (attach schedule	•	acm Z	<del> </del>	411.	<del> </del>		_		23.
Ť	A	19	Depreciation sch) and depl	(attacii letion		ļ						
1.	1 ·	20	Occupancy	· - · · <del>- · ·</del>			· · · · · · · · · · · · · · · · · · ·					<u> </u>
	<u>- 1</u>	21		rences, and meet	inas							
A N		22	Printing and p		J-					_		
N D	Y I	23		ses (attach schedu	ıle)							
-	Ė			• • • • • • • • • • • • • • • • • • • •	•							
	N S	24	Total operation	ng and administra	ative							
	E		expenses. Ac	dd lines 13 throug	h 23		2,711.		1,15	0.	<u> </u>	1,175.
		25	Contributions, gi	fts, grants paid Par	t XV		26,000.					26,000.
		26	Total expens	es and disbursen	nents.							
_			Add lines 24	and 25			28,711.		1,15	0.	0.	27,175.
	T	27		26 from line 12:								
		ā		venue over expen	ses		1/ 207					
			and disburse		_	_	·14,397.	<del> </del>	2 1 6	<u> </u>		
	- }			ncome (if negative, ent				<u> </u>	3,16	4.		
	$\perp$		Adjusted net inco	ome (if negative, enter	-0-)	<u> </u>		L <u></u>			0.	5 000 BE (2000)

r orm	990	PF (2009) The William F. Broll and Elizabeth		33-07	
Parl	i II.	Balance Sheets Attached schedules and amounts in the description column should be for end-of year amounts only	Beginning of year		of year
	T	(See instructions )	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1		2,336.	1,951.	1,950.
	2	Savings and temporary cash investments	3,311.	3,244.	3,244.
	3				
		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 (attach schedule) (see the instructions)			
Α	7				
A S E T		Less allowance for doubtful accounts			
S F	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
S		a Investments — U.S. and state government obligations (attach schedule)			
		b Investments — corporate stock (attach schedule)	312,722.	298,777.	480,565.
	٠	c Investments — corporate bonds (attach schedule)			
	11	Investments – land, buildings, and equipment basis			
		Less accumulated depreciation (attach schedule)			
	ı	Investments – mortgage loans .			
		Investments – other (attach schedule)	1.	1.	
	14	Land, buildings, and equipment basis		•	
		Less accumulated depreciation (attach schedule)			
		Other assets (describe Total assets (to be completed by all filers — see instructions. Also, see page 1, item i)	318,370.	303,973.	485,759.
Ļ	17	Accounts payable and accrued expenses			
Å	18	Grants payable			
Ŗ	19	Deferred revenue			
L l	20	Loans from officers, directors, trustees, & other disqualified persons			
1	21	Mortgages and other notes payable (attach schedule)			
-	22	Other liabilities (describe			
E S	23	Total liabilities (add lines 17 through 22)			
3		Foundations that follow SFAS 117, check here	0.	0.	
N E	24	and complete lines 24 through 26 and lines 30 and 31.  Unrestricted			
N F E U T N	24				
T N	25	Temporarily restricted Permanently restricted			
	20	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
A S B S A E L T A	27	Capital stock, trust principal, or current funds	318,370.	303,973.	
SN	28	Paid-in or capital surplus, or land, building, and equipment fund	320,0.01	303,373.	
O E	29	Retained earnings, accumulated income, endowment, or other funds			
O E R S	30 31	Total net assets or fund balances (see the instructions) Total liabilities and net assets/fund balances	318,370.	303,973.	
		(see the instructions)	318,370.	303,973.	
ran	H   /	Analysis of Changes in Net Assets or Fund Balance	<u>s</u>		
1	Total	net assets or fund balances at beginning of year - Part II, column	n (a), line 30 (must agree	e with	
		of-year figure reported on prior year's return)		1	318,370.
		ramount from Part I, line 27a		2	
		ncreases not included in line 2 (itemize)  ines 1, 2, and 3	· <b></b>	3	
4 /	¬uu l	IUGO 1. 4. ABU 3		ΙΔΙ	303 973

5 Decreases not included in line 2 (itemize)

303,973.

5

rar	(a) List and describe	osses for I ax on Investment the kind(s) of property sold (e.g., re- e, or common stock, 200 shares MLC	al estate,	(b) How acqu P — Purcha D — Donate	se	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a	200 General Electri	c		P	_	5/11/98	12/08/09
b	260 Wal-Mart Stores			P		7/14/98	12/08/09
С							
d	<u> </u>						
е		···					<u>-</u>
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other bas plus expense of sale			(h) Gain or (e) plus (f) m	
a			5	,556.			-2,425.
b	14,166.		8	389.			5,777.
С							
d	<u> </u>						
е							
	<del></del>	g gain in column (h) and owned by the		()		(I) Gains (Colu	ımn (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 an			pain minus column (k an -0-) <b>or</b> Losses (fr	
a	<u> </u>		·····				-2,425.
b	)						<u>5,777.</u>
С	:						
d							
е	·						
	Capital gain net income or (net o	capital loss).  If gain, also on the first state of	enter in Part I, line 7 er -0- in Part I, line 7	_	2		3,352.
	, , ,	B, column (c) (see the instructions)	··· ¬		3		0.
Par		Section 4940(e) for Reduced	Tax on Net Investme	nt Incom	ie		
	s,' the foundation does not qualify	on 4942 tax on the distributable amou y under section 4940(e). Do not comp each column for each year, see the i	lete this part		···	Yes	X No
	(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use asse		(colu	(d) Distribution umn (b) divided	
	2008	27,155.	61.3	,809.		· · · · · · · · · · · · · · · · · · ·	0.044240
	2007	38,110.		776.			0.061490
	2006	28,080.		,153.			0.047023
	2005	36,930.		,947.			0.059093
	2004	34,409.		,934.			0.053436
2	Total of line 1, column (d)				2		0.265282
3	Average distribution ratio for the number of years the foundation is	5-year base period — divide the total has been in existence if less than 5 y	on line 2 by 5, or by the ears		3		0.053056
4		able-use assets for 2009 from Part X,			4		435,500.
5	Multiply line 4 by line 3				5		23,106.
6	Enter 1% of net investment inco	me (1% of Part I line 27h)		F	6		132.
		THE COUNTY OF THE EAST					23,238.
7	Add lines 5 and 6				7		
8		n Part XII, line 4 an line 7, check the box in Part VI, lir	ne 1b, and complete that par	ــا t using a 1°	8   % ta:	x rate See the	27,175.
_	Part VI instructions		·····				n <b>990-PF</b> (2009)

Part V   Excise Tax Based on Investment Income (Section 4940), 4940(b), 4940(c), or 4946 — see the instructions)   1 a tempt operaging fundations decided in struch 49(40)(2), debt let w		-PF (2009) The William F. Broll and Elizabeth Tyler	33-	079918	1		Page 4
Deformation foundations that meet the section 4940(b) requirements in Part V. check here	Part VI	Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948	- see 1	the instru	ctions)		
b Domestic foundations that meet the scallon 49/0(p) requirements in Part V, check here \( \bigcap \) and enter 1% of Part I, line 2/b cAll other domestic boundations with 2% of line 2/b Europt faring organizations eiter 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.)  3 Add lines 1 and 2  5 Subtille 4, (incomp) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0.)  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0.  5 Credits/Poyments:  a 2/0 submitle 4 (incomp) tax (domestic section 4947(a)(1) frusts and taxable foundations only. Others enter -0.)  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0.  5 Credits/Poyments:  a 2/0 submitle 4 (incomp) tax (domestic section 4947(a)(1) frusts and taxable foundations only. Others enter -0.)  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0.  5 Credits/Poyments:  a 2/0 submitle 4 (incomp) tax (domestic section 4947(a)(1) frusts and taxable for line 4 from line 3. If zero or less, enter -0.  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0.  5 Tax based on investment in a from tax line 7, and the control of the 5 from 2220 is attached.  6 Exempt foregon organizations - Law withhold at source can be control or line 5 from 2220 is attached.  7 Total credits and payments. Add lines 5 and 2, tell the amount overpaid.  10 Overpayment if line 2 is once than the total did line 5 and 2, tell the amount overpaid.  10 Line 1 frust line 1 is a size than the 10 is line 5 and 2, tell the amount overpaid.  11 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or influence in resource or influence in resource in a size of the 11 line 2 line 5 and 5 line		<b>└</b>					
check here		\					
A lither domaits (swindstone enter 2% of line 27b Exempl Inergin erganizations calles 4% of Part I, line 12, column (b)  2 Tau under acution 511 (domaits cachin 4947(a)(1) trusts and taxable foundations only. Others enter -0-)  3 Add lines 1 and - 3 and			-	1			132.
2							
loundations only. Others enter -0-) 3 Add lines 1 and 2 3 1.32. 4 Subtitle A (income) tax (demests section 494/a)(1) trusts and taxable foundations only. Others enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on lines shad 2000 overpament credited to 2009 6 Exempt foreign organizations – tax withheld at source C Tax paid with application for extension of time to file (Form 8965) 6 C 300. 6 D 300. 6 C 300. 6 C 300. 7 Total credits and payments. Add lines 6 at though 6d 7 Total credits and payments. Add lines 6 at though 6d 8 Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached 8 D 1 at dee. If the total of lines 5 and 8 is more than line 7, enter amount over 1 overpament if line 7 is not fine the botal of lines 5 and 8 is more than line 8, enter amount over 1 overpament if line 7 is not fine the botal of lines 5 and 8 is more than line 8, enter amount over 1 overpament if line 7 is not fine the botal of lines 5 and 8 is not than line 9, enter amount over 1 overpament if line 7 is not fine the botal of lines 5 and 8 is not the amount over 1 overpament 1	c All o	ther domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b).					
4 Subthle A (name) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 6 Credital Payments:  - 2008 estimated tax pints and 2008 everpayment credited to 2009 6 Exempt foreign organizations — tax withheld at source 6 Bb 6 Cc	2 Tax	under section 511 (domestic section 4947(a)(1) trusts and taxable					
4 Subtille A (encome) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter-0-1 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter-0-1 5 Credits/Payments: a 200 estimated tax pints and 2000 everpayment credited to 2009 6 Exempt foreign organizations — tax withheld at source 6 Subtractive foreign organizations — tax withheld at source 6 Subtractive foreign organizations — tax withheld at source 6 Subtractive foreign organizations — tax withheld at source 6 Subtractive foreign organizations — tax withheld at source 6 Subtractive foreign organizations — tax withheld at source 6 Subtractive foreign organizations — tax withheld at source 6 Subtractive foreign organizations — tax withheld at source 6 Subtractive foreign organizations — tax withheld at source 6 Subtractive foreign organizations — tax withheld at source 6 Subtractive foreign organizations — tax withheld at source 6 Subtractive foreign organizations — tax withheld at source 6 Subtractive foreign organizations — tax withheld at source 6 Subtractive foreign organizations — tax withheld at source 6 Subtractive foreign organizations — tax withheld at source 8 Subtractive foreign organizations — tax withheld at source 8 Subtractive foreign organizations — tax withheld at source 8 Subtractive foreign organizations — tax withheld at source 8 Subtractive foreign organizations — tax withheld at source 8 Subtractive foreign organizations — tax withheld at source 8 Subtractive foreign organizations — tax withheld at source 9 Subtractive foreign organizations — tax withheld at source 10 Organizations — tax withheld at source 110 Organization — tax withheld at source 110 Organization — tax withheld at source	_	·		2			
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-6. Credits/Payments:  a 2009 estimated tax pmts and 2008 everpayment credited to 2009  b Exempt foreign organizations — tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6 at through 6d B Enter any penalty for underpayment of estimated tax. Check here T Total arcids and payments. Add lines 6 at through 6d B Enter any penalty for underpayment of estimated tax. Check here T Total credits and payments. Add lines 6 at through 6d B Enter any penalty for underpayment of estimated tax. Check here T Total credits and payments. Add lines 6 at through 6d B Enter any penalty for underpayment of estimated tax. Check here T Total credits and payment file it is more than line 7, eiter amount owed D Overapment file it is more than the total of lines 5 and 8 at the mount owed D Overapment file it is more than the total of lines 5 and 8 at the mount owed D Overapment file it is more than the total of lines 5 and 8 at the mount owed D Overapment file it is more than the total of lines 5 and 8 at the mount owed D Overapment file it is more than the total of lines 5 and 8 at the mount of any 10 day of the standard tax.  Yes Inc.  Tax based on incorporation of the activities  1 a During the tax year, did the foundation in connection with the activities and copies of any malerials published or distributed by the foundation moneration with the activities.  1 b X  If the answer is 'Yes' to Ta or Tb, attach a detailed description of the activities and copies of any malerials published or distributed by the foundation moneration with the activities.  2 b Has the foundation hie Form 1120-POL for this year?  3 b Has the foundation hie Form 1120-POL for this year?  4 b Cold the foundation have unless of the activities (section 4995) imposed during the year of political expenditure tax imposed on foundation managers  5 b Has the f		-		3			<u>132.</u>
6 Credits/Payments: a 2008 externated tax pints and 2008 extrapayment credited to 2009 b Exempt foreign organizations — tax withheld at source c Tax paid with application for extension of time to title (Form 8866) d Beactup withholding erroreously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Entire any penalty for underpayment of settimated tax. Check here W if Form 2220 is attached 8 Entire any penalty for underpayment of settimated tax. Check here Total credits and payments. Add lines 5a at 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment if line 7 is more than the total of lines 5 and 8, elect the amount owerpaid 11 Eather the amount of line 10 by the Credited to 2019 estimated tax 4 18. Refunded 11 0 0.  Part VII-A   Statements Regarding Activities 1a During the tax year; det the foundation attempt to influence any national, state, or local legislation or did it participate or interviene in any political examplagin?  1a During the tax year; det the foundation attempt to influence any national, state, or local legislation or did it participate or interviene in any political examplagin?  1b Dut it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for defention)?  1b X  1c X  4 Enter the membrusement of the form 1120-PDL for this year?  2 Enter the membrus formatic (if any) paid of the calcivities 3 Has the foundation his Form 1120-PDL for this year?  3 Has the foundation managers  4 During the memoral (if any) of tax on political expenditures (section 4955) imposed during the year  (i) On the foundation on paged in any activities that have not previously been reported to the IRS?  If Yes, 'attach a detailed description of the activities  3 Has the foundation managers  5 Q. (2) On foundation managers  6 Q. (2) On foundation managers  7 A Dut the foundation have unrelated business gross income of \$1,000 or more during the year?  8 Was there al			)				
a 200 estimated tax pints and 2008 overgoment credited to 2009 b Exempt foreign organizations — tax withheld at source c Tax paid with application for extension of time to file (Form 8969) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax Check here 9 Tax due. If the total of lines 5 and 8 is more than line 7, either amount owed 10 Overgayment If line 7 is more than line 7, either amount owed 11 Covergayment If line 7 is more than line 7, either amount owed 12 Tax due. If the total of lines 5 and 8 is more than line 7, either amount owed 13 Tax due. If the total of lines 5 and 8 is more than line 7, either amount owed 14 Tax due. If the total of lines 5 and 8 is more than line 7, either amount owed 15 Tax due. If the total of lines 5 and 8 is more than line 7, either amount owed 16 Tax due. If the total of lines 5 and 8 is more than line 7, either amount owed 17 Tax due. If the total of lines 5 and 8 is more than line 7, either amount owed 18 Tax due. If the total of lines 5 and 8 is more than line 7, either amount owed 19 Tax due. If the total of lines 5 and 8 is more than line 7, either amount owed 10 Overgayment If line 7 is more than line 7, either amount owed 11 Tax due. If the summary of the foundation attempt to influence any nationals, state, or local legislation or did it 10 Tax due 11 Tax				5			<u>132.</u>
b Exempt foreign organizations – tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 5a through 5d 8 Enter any penalty for underpayment of estimated tax. Check here 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment if line 7 is more than line fold of lines 5 and 8 is more than line 7, enter amount owed 11 Enter the amount of line 10 to the Triedet to 20 set state the description of line amount of line 10 to the Triedet to 20 set of lines 5 and 8 is more than line 7, enter amount owed 11 Enter the amount of line 10 to the Triedet to 20 set of lines 5 and 8 is more than line 7, enter amount owed 12 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?  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?  b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the 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  1b X  1b X  1b X  1c X  1c X  1b X  1c							
c Tax partd with application for extension of time to file (Form 8668) d Backup withholding erroneously withhold 7 Total credits and payments. Add lines 5a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here 8 Tax due. If the total of lines 5a and 8 is more than the 12 eleis amount owed 10 Overpayment. If line? Is more than the total of lines 5 and 8, enter the amount owed 11 Enter the amount of line 10 to be Credited to 2016 estimated tax.  12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it particularly and the foundation attempt to influence any national, state, or local legislation or did it particularly application or did into the participate or interverie in any political campaign?  b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?  If the answer is 'Yes' to lar or 1b, statch a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities.  1 Chief the foundation in Form 1120-P01 for this year?  2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) on the foundation managers			50.				
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1 Jilli <b>330-1 1</b> (2003)				F		)-PF /	

Forn	990-PF (2009) The William F. Broll and Elizabeth Tyler	33-07991	81	F	age 5
	t 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 exem	ption application?	13	X	
14		phone no ► 415-	78 <b>6-</b> 6	664	
	Located at ► P.O. Box 6245 Arnold CA ZIP	+4 ► 95223			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check h		N/A	. ►	
<b>D</b>	and enter the amount of tax-exempt interest received or accrued during the year	<u>►</u>   15			N/A
Par	t VII-B   Statements Regarding Activities for Which Form 4720 May Be Requir	ea		V	N-
1.	File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.			Yes	No
1 4	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 XNo			
		. Lies Millo			
	(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?	Yes X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes X 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 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			
ŀ	If any answer is 'Yes' to 1a(1)-(6), did <b>any</b> of the acts fail to qualify under the exceptions described Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see the instr	d in ructions)?	1b	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 a that were not corrected before the first day of the tax year beginning in 2009?	acts,	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			
8	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				
ŀ	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4 (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4		21	N	/ 3
,	all years listed, answer 'No' and attach statement — see the instructions.).  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the year.	ars here	2b	1/1	/A
	20, 20, 20				
3a	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			
ŀ	olf '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 apply the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, (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).	roved or	3b	N	/A
Δ:	Did the foundation invest during the year any amount in a manner that would jeopardize its				
70	charitable purposes?		4a		X
	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		Х
BAA			orm 99	0-PF	(2009)

Form 990-PF (2009) The William F. Bro			33-07		Page 6
Part VII-B   Statements Regarding Activit	<u>ies for Which Forr</u>	<u>n 4720 May Be Rec</u>	uired (continued)		
5a During the year did the foundation pay or incur	•				1
(1) Carry on propaganda, or otherwise attemp	t to influence legislation	n (section 4945(e))?	∐ Yes X	No	
(2) Influence the outcome of any specific publ on, directly or indirectly, any voter registra	ic election (see section tion drive?	4955), or to carry		No	
(3) Provide a grant to an individual for travel,	study, or other similar p	ourposes?	Yes X	No	
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	ian a charitable, etc, org 4940(d)(2)? (see instruc	ganization described ctions)	Yes X	No	
(5) Provide for any purpose other than religious educational purposes, or for the prevention	us, charitable, scientific, n of cruelty to children o	, literary, or or animals?	Yes X	No	
b If any answer is 'Yes' to 5a(1)-(5), did any of the described in Regulations section 53 4945 or in (see instructions)?	he transactions fail to quality a current notice regard	ualify under the exception ing disaster assistance	ons	5b	N/A
Organizations relying on a current notice regain	ding disaster assistance	e check here	► [		
c If the answer is 'Yes' to question 5a(4), does t tax because it maintained expenditure response	he foundation claim exe sibility for the grant?	emption from the	N/A Yes	No	
If 'Yes,' attach the statement required by Regu	ılatıons section 53 4945	-5(d)			
6a Did the foundation, during the year, receive ar on a personal benefit contract?	•			No	
<b>b</b> Did the foundation, during the year, pay premi If 'Yes' to 6b, file Form 8870	ums, directly or indirect	ly, on a personal benefi	t contract?	6b	<u> </u>
<b>7a</b> At any time during the tax year, was the found	ation a party to a probit	nited tay chelter transac	tion? Yes X	No	
<b>b</b> If yes, did the foundation receive any proceeds				7b	N/A
Part VIII Information About Officers, D					
and Contractors		· 			<del></del>
1 List all officers, directors, trustees, foundation	managers and their co	mpensation (see instru	ctions).	Y	
(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 a other allow	
Elizabeth T. Broll	President	0.	0.		0.
P.O. Box 6245	0			İ	
Arnold, CA 95223				ļ	
William F. Broll P.O. Box 6245	Vice Pres & 0	0.	0.		0.
Arnold, CA 95223			L		
_Belinda E. Broll	Vice Pres.	0.	0.		0.
P.O. Box 6245	0			į	
Arnold, CA 95223	VD C There a				
Brandon W. Broll P.O. Box 6245	VP & Treas.	0.	0.		0.
Arnold, CA 95223					
2 Compensation of five highest-paid employees	(other than those inclu	uded on line 1— see ınstı	ructions). 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 a other allow	
None					
				ł 	
Total number of other employees paid over \$50,000					0
BAA	TEEA0306L (	07/06/09		Form <b>990-F</b>	F (2009)

Part VIII	1009) The William F. Broll and Elizabeth Tylenformation About Officers, Directors, Trustees, Found		
<del></del>	nd Contractors (continued)		
3 Five higher 'NO	est-paid independent contractors for professional services (see in NE.'	structions). If none,	
	ame and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
None			
			•
		<u> </u>	
· · · · · · · · · · · · · · · · · · ·			
Total number o	f others receiving over \$50,000 for professional services	<u> </u>	0
Part IX-A	Summary of Direct Charitable Activities		
List the foundation's	s four largest direct charitable activities during the tay year. Include relevant statistical	information such as the number of	
	s four largest direct charitable activities during the tax year. Include relevant statistical ther beneficiaries served, conferences convened, research papers produced, etc	minormation such as the number of	Expenses
1 <u>N/A</u>			
2			
3			
4			
Part IX-B S	summary of Program-Related Investments (see instruc	ctions)	
Describe the tv	vo largest program-related investments made by the foundation durin	g the tax year on lines 1 and 2	Amount
1 <u>N/A</u>			
2			
All other progra	am-related investments. See instructions.		
3	an related integrations.		

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Form **990-PF** (2009)

Total. Add lines 1 through 3

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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

3Ь

4

5

27,175.

27.043.

132.

BAA Form 990-PF (2009)

**Qualifying distributions** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income.

b Cash distribution test (attach the required schedule)

6 Adjusted qualifying distributions. Subtract line 5 from line 4

Enter 1% of Part I, line 27b (see instructions)

#### Part XIII Undistributed Income (see instructions)

	(a) Corpus	<b>(b)</b> Years prior to 2008	<b>(c)</b> 2008	<b>(d)</b> 2009
1 Distributable amount for 2009 from Part XI, line 7				21,643.
2 Undistributed income, if any, as of the end of 2009				21,045.
a Enter amount for 2008 only			0.	
<b>b</b> Total for prior years: 20, 20, 20		0.		······································
3 Excess distributions carryover, if any, to 2009				
<b>a</b> From 2004			-	
<b>b</b> From 2005		***************************************	1	
<b>c</b> From 2006				
<b>d</b> From 2007	1		1	
e From 2008 25, 648.				
f Total of lines 3a through e	25,648.			
4 Qualifying distributions for 2009 from Part				
XII, line 4. ► \$27,175.			+	
a Applied to 2008, but not more than line 2a			0.	
••				
<b>b</b> Applied to undistributed income of prior years (Election required – see instructions)		0.		······································
<ul> <li>Treated as distributions out of corpus (Election required — see instructions)</li> </ul>	27,175.			
d Applied to 2009 distributable amount				0.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009	21,643.			21,643.
(If an amount appears in column (d), the same amount must be shown in column (a))			#	
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	31,180.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.	1	
c Enter the amount of prior years' undistribut-				
ed income for which a notice of deficiency has been issued, or on which the section			1	
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 instructions			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			1	
corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)				
(see instructions)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	31,180.			
10 Analysis of line 9:				· · · · · · · · · · · · · · · · · · ·
a Excess from 2005			1	
b Excess from 2006	1			
c Excess from 2007	1		1	
d Excess from 2008 4, 005.	1		-	
e Excess from 2009 27,175.	1			
BAA	<del></del>	<del></del>	<u></u>	Form <b>990-PF</b> (2009)
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Form 990-PF (2009) The William F. B:				33-079918	
Part XIV   Private Operating Foundation			<del> </del>		N/A
1a If the foundation has received a ruling or d is effective for 2009, enter the date of the r	uling	•		` _ ` <b> </b>	<u> </u>
<b>b</b> Check box to indicate whether the foundati		rating foundation de		4942(j)(3) or	4942())(5)
2a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year	4 > 0000	Prior 3 years	4 10 0000	/ \ <del>-</del>
investment return from Part X for each year listed	(a) 2009	<b>(b)</b> 2008	(c) 2007	(d) 2006	(e) Total
<b>b</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					
<ul> <li>Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c</li> </ul>					
3 Complete 3a, b, or c for the alternative test relied upon					
a 'Assets' alternative test — enter:					
<ul><li>(1) Value of all assets.</li><li>(2) Value of assets qualifying under</li></ul>		<u> </u>			<del></del>
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)					
		<del> </del>			
(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		<u> </u>	<u> </u>	<u> </u>	
Part XV Supplementary Information assets at any time during the	(Complete this	part only if the	organization h	nad \$5,000 or mo	ore in
1 Information Regarding Foundation Manage		istructions.)			
		ore than 2% of the to	otal contributions re	ceived by the founda	ation before the
a List any managers of the foundation who h close of any tax year (but only if they have	contributed more	than \$5,000). (See s	section 507(d)(2))	control by the rounds	
See Statement 3					
<b>b</b> List any managers of the foundation who or a partnership or other entity) of which the f None	wn 10% or more o oundation has a 10	f the stock of a corpo 0% or greater interes	oration (or an equal st.	lly large portion of th	e ownership of
2 left and Described Contribution Contribution	C:# L C-b-l				
2 Information Regarding Contribution, Grant Check here ► X if the foundation only m requests for funds. If the foundation makes	akes contributions	to preselected char	itable organizations	and does not accep	t unsolicited r conditions,
complete items 2a, b, c, and d. <b>a</b> The name, address, and telephone number	of the person to	whom applications of	anuld be addressed		
a the hame, address, and telephone hamber	or the person to	тот аррпсакот з	louid be addressed	•	
<b>b</b> The form in which applications should be s	ubmitted and infor	mation and materials	s they should includ	le:	
c Any submission deadlines				······································	······
d Any restrictions or limitations on awards, s	uch as by geograp	hical areas, charitab	le fields, kinds of in	nstitutions, or other fa	actors
		· · · · · · · · · · · · · · · · · · ·			
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3 Grants and Contributions Paid During the Yea	r or Approved for Futui	re Payment			
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purp	ose of grant or contribution	Amount
Name and address (home or business)	substantial contributor	recipient			
a Paid during the year Family Stress Center 2086 Commerce Ave Concord, CA 94520	None		General	Support	25,000.
SF Humane Society 2500 16th Street San Francisco, CA 94103	None		General	Support	1,000.
Total				<u>► 3a</u>	26,000.
b Approved for future payment					
Total				► 3b	

#### Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelate	ed business income	Excluded 1	oy section 512, 513, or 514	
1 Program service revenue.	(a) Business code	<b>(b)</b> Amount	(c) Exclu- sion code	<b>(d)</b> Amount	(e) Related or exempt function income (see the instructions)
a					
b					
c					
d					
e					
ſ					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	10,962.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
<b>b</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			18	3,352.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a Excise Tax Refund					
b					
С					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				14,314.	
13 Total. Add line 12, columns (b), (d), and (e)				13	14,314.
See worksheet in the instructions for line 13 to verify ca	lculations)			•	

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

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	
· · ·	
	<u> </u>

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

								1 1	res	NO
	descr	ne organization direct libed in section 501(c ng to political organiz	) of the Code (o	ngage in any of the following ther than section 501(c)(3)	ng with ai organizat	ny other organizations) or in section	on 527,			
				a noncharitable exempt or	ganızatıo	n of:				
	<b>(1)</b> C	,		•	J			1a (1)		Х
	• •	other assets						1a (2)		X
	• •	transactions:					·			
	(1) S	ales of assets to a n	oncharitable exe	empt organization				1 b (1)		Х
	• •			able exempt organization		•		1b (2)		X
	• •	ental of facilities, eq		, -				1b (3)		X
		eimbursement arran	•					1b (4)		X
	• •	oans or loan guarant	~					1b (5)		X
	• •	•		nip or fundraising solicitatio	ns			1b (6)		X
	• •			sts, other assets, or paid er				1c		X
				,			·		L	
	the g	oods, other assets, o	r services given	complete the following sch by the reporting foundation how in column (d) the value	n if the fo	oundation received	less than fair market	value in	of	
any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services receive (a) Line no (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and									gement	<u> </u>
	/A									
	·									
_										
_										
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_		<del></del>		<del></del>						
	descr	foundation directly on the following formula for the following formula for the following formula for the following for t	) of the Code (o	ated with, or related to, one ther than section 501(c)(3))	e or more or in sec	tax-exempt organi tion 527?	zations	Yes	X	No
-	<b>D</b> 11 10	(a) Name of organiz		(b) Type of organ	ızatınn		(c) Description of rela	ationship		
N	/A	(a) Hame of organiz	attor i	(b) Type of Grgan	1241011		(c) Description of tele	100113111p		
	/ 11									
_										
_				<del> </del>						
_										
_	Linder nena	thes of negury 1 declare that	I have examined this i	eturn, including accompanying schedu	iles and state	ments, and to the best of o	ny knowledge and belief it is t	rue correct a	nd	
	complete	Declaration of preparer (of	er than taxpayer or	iduciary) is based on all information	of which pr	eparer has any knowledg	e	,,		
		$\sim 1/2$		Ø )						
S	<b> ►</b> _×	1 Jan	, <			12 6/23/10	_ > 12 /reas.	urer		
G N	Sign	ature of officer or trustee	,	<u> </u>		Date / /	Title			
		Branovski 2	218			Date	Check if Prep	arer's Identify	ing num	ber
HERE	Paid	Preparer's signature	//	Soood		0/8/10	Falf  `	3192192		,
R	Pre- parer's	Firm's name (or PK	Taylor &	Associates		1 1 5/15	60.04			
	Use	yours if self								
	Only	employed), 2890 NOTEN MAIN St., Suite 305						5) 0//	-766	:2
	AA	ZIP code Wal		,			Phone no ► (92	Form 99		
<b>D</b> /	~~							כל ווווט ו	U-FF	(といいコ)

2009

### **Federal Supplemental Information**

Page 1

**Client 11740** 

The William F. Broll and Elizabeth Tyler Broll Charitable Foundation

33-0799181

ELECTION UNDER SECTION 4942(h)(2) OF THE INTERNAL REVENUE CODE OF 1986 AND SECTION 53.4942(a)-3(d)(2) OF THE EXCISE TAX REGULATIONS.

THE WILLIAM F. BROLL AND ELIZABETH TYLER BROLL CHARITABLE FOUNDATION, FOR ITS YEAR ENDED DECEMBER 31, 2009, ELECTS UNDER SECTION 4942(h)(2) OF THE INTERNAL REVENUE CODE OF 1986 AND SECTION 53.4942(a)-3(d)(2) OF THE EXCISE TAX REGULATIONS TO TREAT QUALIFYING DISTRIBUTIONS OF \$21,643 AS MADE OUT OF CORPUS.

FOUNDATION OFFICER

2009 ·	Federal Statemen The William F. Broll and Elizab	Page 1		
Client 117 <b>4</b> 0	Broll Charitable Foundat	ion	33-079918	
Statement 1 Form 990-PF, Part I, Line 16b Accounting Fees				
	Expenses In	(b) Net (c) vestment Adjusted Income Net Income	(d) Charitable Purposes	
Accounting Fees	Total $\frac{$2,300.}{$2,300.}$	1,150. 1,150. \$ 0. \$	1,150. 1,150.	
Statement 2 Form 990-PF, Part I, Line 18 Taxes				
	Expenses In	(b) Net (c) vestment Adjusted <u>Income Net Income</u>	(d) Charıtable Purposes	
Excise Tax State filing fees	$ \begin{array}{cccccccccccccccccccccccccccccccccccc$	<u>0.</u> <u>\$</u> <u>0.</u> <u>\$</u>	25. 25.	

Foundation Managers - 2% or More Contributors

Elizabeth T. Broll William F. Broll