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Form **990-PF**

Department of the Treasury  
Internal Revenue Service

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

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

OMB No 1545-0052  
**2009**

For calendar year 2009, or tax year beginning 01-01-2009 , and ending 12-31-2009

G

Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation THE SCHIEVELBEIN FAMILY FOUNDATION TRUST		A Employer identification number 33-1033929	
	Number and street (or P O box number if mail is not delivered to street address) Room/suite 115 ANDREW LINDSAY		B Telephone number (see page 10 of the instructions) (757) 258-4911	
	City or town, state, and ZIP code WILLIAMSBURG, VA 23185		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,057,940		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) (Part I, column (d) must be on cash basis.)		

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions) )		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities. . . . .	17,521	17,521		
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-128,586			
	b Gross sales price for all assets on line 6a <u>453,198</u>				
	7 Capital gain net income (from Part IV , line 2) . . . .		0		
	8 Net short-term capital gain . . . . .				
	9 Income modifications . . . . .				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold . . . . .				
	c Gross profit or (loss) (attach schedule) . . . . .				
	11 Other income (attach schedule) . . . . .				
	12 <b>Total.</b> Add lines 1 through 11 . . . . .	-111,065	17,521		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages . . . . .				
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule) . . . . .				
	b Accounting fees (attach schedule) . . . . .	4,100	4,100		0
	c Other professional fees (attach schedule) . . . . .	7,258	7,258		0
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see page 14 of the instructions)	503	490		0
	19 Depreciation (attach schedule) and depletion . . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule) . . . . .				
	24 <b>Total operating and administrative expenses.</b>				
	Add lines 13 through 23 . . . . .	11,861	11,848		0
	25 Contributions, gifts, grants paid . . . . .	54,200			54,200
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	66,061	11,848		54,200
	27 Subtract line 26 from line 12				
	a <b>Excess of revenue over expenses and disbursements</b>	-177,126			
	b <b>Net investment income</b> (if negative, enter -0-)		5,673		
	c <b>Adjusted net income</b> (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing . . . . .	27,670		
	2	Savings and temporary cash investments . . . . .	37,604	55,230	55,230
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable . . . . .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions) . . . . .			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use . . . . .			
	9	Prepaid expenses and deferred charges . . . . .	2,147	1,243	1,243
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule) . . . . .	926,085	766,990	759,742
	c	Investments—corporate bonds (attach schedule). . . . .			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans . . . . .			
	13	Investments—other (attach schedule) . . . . .	269,252	264,071	241,725
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,262,758	1,087,534	1,057,940	
Liabilities	17	Accounts payable and accrued expenses . . . . .			
	18	Grants payable . . . . .			
	19	Deferred revenue . . . . .			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule) . . . . .			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22) . . . . .	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted . . . . .			
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds . . . . .	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	1,262,758	1,087,534	
	30	Total net assets or fund balances (see page 17 of the instructions) . . . . .	1,262,758	1,087,534	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions) . . . . .	1,262,758	1,087,534	

Part III Analysis of Changes in Net Assets or Fund Balances		
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return) . . . . .	11,262,758
2	Enter amount from Part I, line 27a . . . . .	-177,126
3	Other increases not included in line 2 (itemize) ▶ _____	1,902
4	Add lines 1, 2, and 3 . . . . .	1,087,534
5	Decreases not included in line 2 (itemize) ▶ _____	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	1,087,534

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co )		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr )	(d) Date sold (mo , day, yr )
1 a	publicly traded securities			
b	rights redemption			
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 453,107		581,693	-128,586
b 91		91	0
c			
d			
e			

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			-128,586
b			0
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-128,586
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)  If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8 . . . . .		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No  
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	66,619	1,269,467	0 052478
2007	76,843	1,504,754	0 051067
2006	65,944	1,377,174	0 047884
2005	65,452	1,313,794	0 049819
2004	64,231	1,245,431	0 051573

2 Total of line 1, column (d). . . . .	2	0 252821
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years . . . .	3	0 050564
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5. . . . .	4	960,930
5 Multiply line 4 by line 3. . . . .	5	48,588
6 Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	57
7 Add lines 5 and 6. . . . .	7	48,645
8 Enter qualifying distributions from Part XII, line 4. . . . .	8	54,200

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1aExempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
bDomestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .		1	57
cAll other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3Add lines 1 and 2. . . . .		3	57
4Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
5Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0- . . . . .		5	57
6Credits/Payments			
a2009 estimated tax payments and 2008 overpayment credited to 2009	6a	1,280	
bExempt foreign organizations—tax withheld at source . . . . .	6b		
cTax paid with application for extension of time to file (Form 8868)	6c		
dBackup withholding erroneously withheld . . . . .	6d		
7Total credits and payments Add lines 6a through 6d. . . . .		7	1,280
8Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached		8	
9Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed . . . . .		9	
10Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid. . . . .		10	1,223
11Enter the amount of line 10 to be Credited to 2010 estimated tax 160 Refunded		11	1,063

Part VII-AStatements Regarding Activities

1aDuring 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	Yes	No
bDid it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of 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		No
cDid the foundation file Form 1120-POL for this year? . . . . .	1c		No
dEnter 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			
eEnter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0			
2Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . If "Yes," attach a detailed description of the activities.	2		No
3Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes . . . . .	3		No
4aDid the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .	4a		No
bIf "Yes," has it filed a tax return on Form 990-T for this year? . . . . .	4b		
5Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . If "Yes," attach the statement required by General Instruction T.	5		No
6Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? . . . . .	6	Yes	
7Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8aEnter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) VA			
bIf 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	Yes	
9Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV . . . . .	9		No
10Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A

Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of THOMAS C SCHIEVELBEIN Telephone no (757) 258-4911 Located at 115 ANDREW LINDSAY WILLIAMSBURG VA ZIP+4 23185			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here and enter the amount of tax-exempt interest received or accrued during the year.			
		15		

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

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

<p><b>5a</b> During the year did the foundation pay or incur any amount to</p> <p><b>(1)</b> Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>(2)</b> Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>(3)</b> Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>(4)</b> Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions). . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>(5)</b> Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>b</b> If any answer is "Yes" to 5a(1)–(5), did <b>any</b> of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here. . . . <input checked="" type="checkbox"/></p> <p><b>c</b> If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? . . . . <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," attach the statement required by Regulations section 53.4945–5(d).</p>			
<p><b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . If "Yes" to 6b, file Form 8870.</p>	<b>5b</b>		<b>No</b>
<p><b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p><b>b</b> If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? . . . .</p>	<b>6b</b>		
	<b>7b</b>		

**1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
BETTY J SCHIEVELBEIN	PRESIDENT	0	0	0
115 ANDREW LINDSAY WILLIAMSBURG, VA 23185	1 00			
THOMAS C SCHIEVELBEIN	TRUSTEE	0	0	0
115 ANDREW LINDSAY WILLIAMSBURG, VA 23185	1 00			
Stacy J Schievelbein	Trustee	0	0	0
115 andrew lindsay Williamsburg, VA 23185	1 00			
Lisa J Schievelbein	Trustee	0	0	0
115 Andrew Lindsay Williamsburg, VA 23185	1 00			

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
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[illegible]

<b>Total</b> number of other employees paid over \$50,000. . . . .	0
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Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see page 23 of the 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	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3. . . . .	0



Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities. . . . .	1a	927,063
b	Average of monthly cash balances. . . . .	1b	48,500
c	Fair market value of all other assets (see page 24 of the instructions). . . . .	1c	0
d	Total (add lines 1a, b, and c). . . . .	1d	975,563
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	1e	0
2	Acquisition indebtedness applicable to line 1 assets. . . . .	2	0
3	Subtract line 2 from line 1d. . . . .	3	975,563
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions). . . . .	4	14,633
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	960,930
6	Minimum investment return. Enter 5% of line 5. . . . .	6	48,047

Part XI

Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

1	Minimum investment return from Part X, line 6. . . . .	1	48,047
2a	Tax on investment income for 2009 from Part VI, line 5. . . . .	2a	57
b	Income tax for 2009 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	57
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	47,990
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	0
5	Add lines 3 and 4. . . . .	5	47,990
6	Deduction from distributable amount (see page 25 of the instructions). . . . .	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	7	47,990

Part XII

Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26. . . . .	1a	54,200
b	Program-related investments—total from Part IX-B. . . . .	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required). . . . .	3a	
b	Cash distribution test (attach the required schedule). . . . .	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	54,200
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 page 26 of the instructions). . . . .	5	57
6	Adjusted qualifying distributions. Subtract line 5 from line 4. . . . .	6	54,143
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				47,990
2 Undistributed income, if any, as of the end of 2008				
a Enter amount for 2008 only. . . . .			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2009				
a From 2004. . . . .				
b From 2005. . . . .				573
c From 2006. . . . .				4,197
d From 2007. . . . .				1,919
e From 2008. . . . .				5,658
f Total of lines 3a through e. . . . .	12,347			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 54,200				
a Applied to 2008, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .	0			
d Applied to 2009 distributable amount. . . . .				47,990
e Remaining amount distributed out of corpus	6,210			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	18,557			
b Prior years' undistributed income Subtract line 4b from line 2b. . . . .		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . .		0		
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . .		0		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the 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 corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions). . . . .	0			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions). . . . .	0			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a . . . . .	18,557			
10 Analysis of line 9				
a Excess from 2005. . . . .				573
b Excess from 2006. . . . .				4,197
c Excess from 2007. . . . .				1,919
d Excess from 2008. . . . .				5,658
e Excess from 2009. . . . .				6,210

Part XIVPrivate Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .	Tax year	Prior 3 years			(e) Total
		(a) 2009	(b) 2008	(c) 2007	(d) 2006	
b	85% of line 2a . . . . .					
c	Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
d	Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets . . . . .					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . . .					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2) )

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number of the person to whom applications should be addressed

b

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

c

Any submission deadlines

d

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

Form 990-PF (2009)

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total . . . . .			▶ 3a	54,200
b Approved for future payment				
Total . . . . .			▶ 3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2009)

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

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

[illegible]

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


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

<div style="writing-mode: vertical-rl; transform: rotate(180deg);">Sign Here</div>	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge				
	Signature of officer or trustee			Date	
	*****			2010-04-28	
	*****			*****	
	Title			Title	
<div style="writing-mode: vertical-rl; transform: rotate(180deg);">Paid Preparer's Use Only</div>	Preparer's Signature		Michael S Haigh		Date
	Check if self-employed		<input checked="" type="checkbox"/>		Preparer's identifying number (see <b>Signature</b> on page 30 of the instructions)
	Firm's name (or yours if self-employed), address, and ZIP code		WITT MARES PLC 701 TOWN CENTER DRIVE SUITE 900 NEWPORT NEWS, VA 236064287		EIN
				Phone no (757) 873-1587	

Additional Data

Software ID: 09000028  
Software Version: 2009.03040  
EIN: 33-1033929  
Name: THE SCHIEVELBEIN FAMILY FOUNDATION TRUST

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
AMERICAN RED CROSS39 Harris Road Kilmarnock, VA 22482	NONE	501(C)(3)	GENERAL SUPPORT	2,000
Christopher Newport University Ferguson Center for Performing Arts1 University Place Newport News, VA 23606	none	501(c)(3)	general support	10,000
COLLEGE OF WILLIAM AND MARY FoundationPO Box 1693 Williamsburg, VA 231878779	NONE	501(C)(3)	EDUCATION	10,000
RAPPAHANOCK General HOSPITAL FOUNDATION101 Harris Road Kilmarnock, VA 22482	NONE	501(C)(3)	GENERAL SUPPORT	5,000
United Way of Greater Williamsburg 312 Waller Mill Road Suite 100 Williamsburg, VA 23185	none	501(c)(3)	general support	10,000
US Naval Academy Foundation291 Wood Road Annapolis, MD 21402	none	501(c)(3)	General Support	10,000
WHITE STONE VOLUNTEER FIRE DEPARTMENT578 Chesapeake Drive White Stone, VA 22578	NONE	501(C)(3)	GENERAL SUPPORT	2,200
Friends of Balboa Park2125 Park Blvd San Diego, CA 92101	none	501(c)(3)	general support	5,000
<b>Total . . . . .</b>  <b>3a</b>				54,200

**TY 2009 Accounting Fees Schedule**

**Name:** THE SCHIEVELBEIN FAMILY FOUNDATION TRUST

**EIN:** 33-1033929

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	4,100	4,100		0



**TY 2009 Investments Corporate  
Stock Schedule**

**Name:** THE SCHIEVELBEIN FAMILY FOUNDATION TRUST  
**EIN:** 33-1033929

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Axis Capital Holdings Ltd Shs	1,851	1,733
USB Ag SHS	4,192	2,094
Aegon N V Ord Amer Reg	2,097	2,058
Alcatel Lucent Spon Adr	8,086	2,420
Alumina LTD Sponsored ADR	0	0
Angold Ashanti Ltd Sponsored ADR	0	0
Anglogold Ashanti Ltd Sponsored Adr	3,490	4,179
BP PLC Spons Adr	5,096	4,464
Barrick Gold Corp Com	4,901	6,025
Cameco Corp Com	2,144	2,509
Carefour SA Adr	3,675	3,919
Electobras Centrais Electrcia Adr	724	1,160
Dai Nippon Prtg Ltd Japan Spon Adr	3,370	3,298
Daiwa House Ind Ltd Adr	2,336	2,562
Ericsson L M Tel Co ADR CL B SEK	0	0
Embraer Empresa Brasileira De	1,900	1,990
Fujifilm Hldgs Corp Adr	5,442	4,645
Gold Fields Ltd New Spons Adr	3,547	3,343
Hachujuni Bk Ltd Adr	2,109	2,030
Impala Pltum Hld Ltd Sponsored Adr	1,979	2,123
Ivanhoe Mines Ltd	1,281	2,250
KAO Corp Sponsored Adr	3,915	4,439
KT Corp Spon ADR	0	0
Kinross Gold Corp Com	4,482	4,491
Kirin Hlds CO LTD Sponsored ADR	0	0
Korea Elec Pwr Co	5,232	3,737
Lihir Gold Limited ADR	0	0
Lonmin Pub Ltd Sponsored ADR	0	0
Magna International Inc Class A	3,023	2,478
Mitsui Sumitomo Ins Grp Hldgs Inc Adr	3,388	2,362
Newcrest Mining Ltd Adr	2,093	3,273
Nexen Inc Com Shs	3,774	3,805
Nintendo Ltd Adr	2,697	2,426
Nippon Teleg & Telephone Corp	6,051	5,270
Nokia Corp Sponsored Adr	3,087	3,187
Novartis AG Sponsored ADR	3,511	4,844
Panasonic Corp Adr	2,552	2,124
Rexam PLC Sponsored ADR	907	939
Rohm Co Ltd Adr	1,091	1,465
Royal Dutch Shell PLC	4,534	3,778
SK Telecom Ltd Sponsored ADR	5,770	5,268
Sanofi Aventis Spons Adr	4,962	5,459
Sega Sammy Hldgs Inc Spons Adr Repstg Com	4,264	2,278
Sekisui House Ltd Sponsored Adr	2,580	2,271
Seven & 1 Hldgs Co Ltd	5,644	4,513
Shiseido Ltd Spon Adr	4,428	4,496
Siemens A G Sponsored Adr	2,765	3,393
Societe Generale France Spon Adr	1,012	1,615
Sumitomo TR &BKG LTD Sponsored Adr	2,605	1,937
Swisscom Spon Adr	4,162	4,784
TDK Corp American Dep Shs	1,008	1,881
Technip Spons Adr	785	1,985
Telecom Italia S P A New Spon Adr	9,481	4,400
United Utils Group PLC Spon Adr	2,736	2,546
Vodafone Group PLC Spon Adr	3,769	4,295
Wacoal Hlgs Corp Adr	3,206	2,638
Wolter Kluwer N V Spon Adr	3,000	3,929
Foster Wheeler AG Com	2,892	1,178
Acuity Brands Inc CO Inc	2,357	2,138
Allete Inc Com New	1,569	1,961
Arch Chemicals Inc Com	2,678	2,162
Bankfinancial Corp Com	4,834	3,020
Beneficial Mut Bancorp Inc Com	1,853	1,870
Brinks Home Sec Hldgs Inc Com	2,598	3,101
Broadridge Finl Solutions Inc Com	4,263	5,414
Bucyrus Intl Inc New Com	2,302	3,382
Chicago Bridge & Iron CO N V	4,099	3,434
Circor Intl Inc Com	3,009	2,518
Compass Minerals Intl Inc Com	2,969	2,688
Comstock Res Inc	3,347	4,057
Covanta Hldgs Corp	4,536	2,894
Deltic Timber Corp	6,670	5,311
Dineequity Inc Com	2,278	971
Exco Res Inc Com	3,263	4,097
Enpro Inds Inc Com	6,702	4,490
Exterran Holdings Inc Com	1,676	1,501
First Niagara Finl Group Inc New Com	2,277	2,365
Firstmerit Corp Com	3,534	3,625
Flowers Foods Inc Com	3,315	4,087
Flowserve Corp Com	928	945
Forestar Group Inc Com	2,691	2,415
Foster L B Co CI A	2,794	3,279
Gallagher Arthur J & CO	2,637	2,476
Goodrich Pete Corp Com New	7,817	3,653
Hanes Brands Inc Com	4,515	4,581
Hanover Insurance Group Inc	2,493	3,110
Hil Rom Hlgs Com	3,503	3,599
Iberiabank Corp Com	3,106	3,767
Investment Technology Group	1,796	1,379
ITC Hlgs Corp Com	2,883	3,125
John Bean technologies Corp	150	204
Joy Global Inc Com	5,514	4,385
Kaiser Alum corp com par	5,315	3,330
Kansas City Southern Com New	4,429	5,326
MB Finl Inc New Com	5,314	2,958
Mcdermott Intl Inc.	1,160	1,201
Mueller Wtr Prods Inc	2,468	1,144
Newalliance Bankshares Inc Com	1,171	1,081
Patterson Cos Inc Com	2,046	3,078
Petrohawk Energy Corp Com	1,525	2,759
Pulte Homes Inc	1,606	1,300
Ralcorp Holdings Inc New Com	3,116	4,777
Tennant Co	2,475	1,309
Texas Industries Inc	2,927	1,400
Timken Co Com	6,754	4,742
toll Bros Inc	3,580	3,386
Treehouse Foods Inc Com	2,298	3,109
Vail Resorts Inc Com	3,973	3,402
Vectren Corp Com	4,054	3,949
Wabtrec Com	2,638	2,859
Walter Energy Inc Com	1,997	6,025
Wendys Arbys Group Inc Com	6,664	1,759
Westar Energy Inc Com	4,937	5,104
Westfield Finl Inc New Com	1,179	908
Willbros Group Inc Del Com	5,537	4,133
Wright Express Corp Com	5,236	5,416
Abbott Labs Com	5,707	6,965
American Express Company	6,346	7,172
Appolo Group Inc	6,837	6,664
Apple Inc Com	4,351	7,591
Avery Dennison Corp Com	6,811	6,495
BMC Software Inc Com	5,728	7,098
Bristol Myers Squibb Co Com	5,955	7,424
Brown Forman Corp	6,719	6,719
Capital One Finl Corp Com	6,460	6,594
Church & Dwight Com Inc	6,269	6,952
Cisco Systems Inc	5,066	6,607
Colgate Palmolive Co	6,828	6,983
Conocophillips com	5,719	6,537
Express Scripts Inc Com	6,113	6,916
Exxon Mobile Corp Com	7,696	5,796
Franklin Resources Inc	5,615	6,426
Freeport Mcmoran Copper & Gold Inc	5,084	6,744
Goldman Sachs Group Inc Com	4,526	6,744
Graftech Intl Ltd	6,720	6,720
Hewlett Packard Co Com	5,836	6,954
Illinois Tool Works Inc Com	5,632	6,575
Intel Corp Com	5,413	7,099
International Business Mach Corp	4,923	7,069
Lender Processing Svcs Inc Com	5,448	6,506
Mcafee Inc Com	4,518	6,369
McDonalds Corp	6,590	6,681
McKesson Corp Com	5,679	6,625
Newfield Expl Co Common	6,697	6,463
PNC Finl Svcs group Inc com	6,300	6,176
Pactiv Corp Com	7,123	6,566
Red hat Inc Com	3,600	7,447
Ross Stores Inc	4,979	6,279
Saic Inc Com	6,405	6,837
Strayer Ed Inc Com	6,368	5,950
Thomas & Betts Corp	6,641	6,299
Valeant Pharmaceuticals Intl	5,546	6,517
Wms Inds Inc Com	6,452	6,280
Wal Mart Stores Inc	7,068	6,628
Western Digital Corp Delaware	6,000	8,036
Whole Foods Mkt Inc	6,639	6,588
AT&T	8,279	6,727
Altria Group Inc Com	7,123	6,674
Astrazeneca PLC Sponsored ADR	6,499	6,571
BP PLC Spons Adr	7,468	6,377
Boeing CO Com	3,049	3,789
Bristol Myers Squibb Co Com	5,521	7,070
Chevron Corp Com New	7,843	6,159
Conocophillips com	5,083	5,107
Diageo Plc Sponsored ADR New	7,398	6,941
FPL Group Inc	4,812	5,282
General Electric Co Com	9,331	5,144
Genuine Parts Co	6,975	6,453
HSBC Hldgs PLC Spons Adr New	4,575	5,709
Heinz H J Company	7,957	6,842
Intel Corp Com	3,269	3,468
Johnson & Johnson Com	3,373	3,864
Kimberly Clark Corp	6,092	6,371
Kraft Foods Inc CL A	7,053	6,523
Lilly eli & Co Com	8,573	6,428
Microsoft Corp Com	1,498	2,377
Nokia Corp Sponsored Adr	5,013	4,112
Philip Morris iNtl Inc Com	6,516	6,265
3M Co Com	4,625	6,614
Travelers Cos Inc Com	2,786	3,490
Unilever NV New York Shs New	6,117	6,789
Verizon Communications Com	6,812	6,295
Vodafone Group PLC Spon Adr	7,962	6,465

**TY 2009 Investments - Other Schedule****Name:** THE SCHIEVELBEIN FAMILY FOUNDATION TRUST**EIN:** 33-1033929

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Optima Emerging Markets Fund	AT COST	253,750	231,478
SPDR Ser TR KBW Regl BKG EFT	AT COST	3,962	3,783
Walter invt mgmt corp com	AT COST	444	702
Health Care REIT Inc	AT COST	5,915	5,762

**TY 2009 Other Increases Schedule**

**Name:** THE SCHIEVELBEIN FAMILY FOUNDATION TRUST

**EIN:** 33-1033929

Description	Amount
adjust purchase price after year end for Anglogold Ashanti Ltd	1,902

**TY 2009 Other Professional Fees Schedule****Name:** THE SCHIEVELBEIN FAMILY FOUNDATION TRUST**EIN:** 33-1033929

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISORY FEES	7,190	7,190		0
FOREIGN SECURITY FEES	68	68		0

TY 2009 Taxes Schedule

**Name:** THE SCHIEVELBEIN FAMILY FOUNDATION TRUST

**EIN:** 33-1033929

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INCOME TAXES	57	0		0
FOREIGN TAXES	446	490		0