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

2009

Department of the Treasury
Internal Revenue Service

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

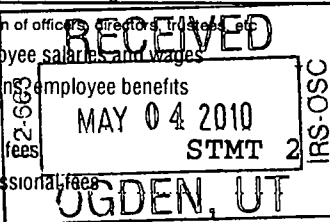
For calendar year 2009, or tax year beginning , and ending

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

Use the IRS label. Otherwise, print or type. See Specific Instructions	Name of foundation ALEX G. NASON FOUNDATION INC.		A Employer identification number 34-1757149
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number (203) 856-5299
	1177 HIGH RIDGE ROAD		
	City or town, state, and ZIP code STAMFORD, CT 06905		
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			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"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 8,861,536. (Part I, column (d) must be on cash basis)		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	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"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	152,780.	152,780.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	1,080,232.			
	b Gross sales price for all assets on line 6a	53,027,202.			
	7 Capital gain net income (from Part IV, line 2)		1,080,232.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total Add lines 1 through 11	1,233,012.	1,233,012.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	140,700.	70,350.		70,350.
	14 Other employee salaries and wages				
	15 Pension plans and employee benefits	53,720.	26,860.		26,860.
	16a Legal fees				
	b Accounting fees	23,534.	11,767.		11,767.
	c Other professional fees				
	17 Interest	227.	227.		0.
	18 Taxes	8,972.	4,474.		4,498.
	19 Depreciation and depletion	5,456.	0.		
	20 Occupancy	16,814.	8,407.		8,407.
	21 Travel, conferences, and meetings	6,756.	0.		6,756.
	22 Printing and publications				
	23 Other expenses	9,650.	2,729.		6,921.
	24 Total operating and administrative expenses Add lines 13 through 23	265,829.	124,814.		135,559.
	25 Contributions, gifts, grants paid	337,500.			337,500.
26 Total expenses and disbursements. Add lines 24 and 25	603,329.	124,814.		473,059.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	629,683.				
b Net investment income (if negative, enter -0-)		1,108,198.			
c Adjusted net income (if negative, enter -0-)			N/A		

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	5,752.	20,869.	20,869.
	2 Savings and temporary cash investments	2,535,749.	4,768,025.	4,768,025.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 6	698,681.	3,389,979.	3,367,835.
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 7	5,000,000.	718,211.	700,907.
	14 Land, buildings, and equipment: basis ▶ 21,299.			
	Less: accumulated depreciation STMT 8 ▶ 17,401.	5,852.	3,898.	3,900.
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	8,246,034.	8,900,982.	8,861,536.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31			
	24 Unrestricted	8,246,034.	8,900,982.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances	8,246,034.	8,900,982.	
	31 Total liabilities and net assets/fund balances	8,246,034.	8,900,982.	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	8,246,034.
2 Enter amount from Part I, line 27a	2	629,683.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 5	3	25,265.
4 Add lines 1, 2, and 3	4	8,900,982.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	8,900,982.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a DISPOSAL OF OBSOLETE EQUIPMENT	P	06/30/03	07/01/09
b S-T PER AMERITRADE SCHEDULE	P	VARIOUS	VARIOUS
c S-T PER SCHWAB SCHEDULE	P	VARIOUS	VARIOUS
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	11,260.	11,260.	0.
b 25,594,166.		25,196,199.	397,967.
c 27,433,036.		26,750,771.	682,265.
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			0.
b			397,967.
c			682,265.
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	1,080,232.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	}	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	594,825.	9,577,358.	.062107
2007	654,251.	11,614,627.	.056330
2006	854,836.	11,371,039.	.075177
2005	730,369.	11,341,530.	.064398
2004	626,482.	11,210,005.	.055886

2 Total of line 1, column (d)	2	.313898
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	.062780
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	8,303,231.
5 Multiply line 4 by line 3	5	521,277.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	11,082.
7 Add lines 5 and 6	7	532,359.
8 Enter qualifying distributions from Part XII, line 4 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.	8	473,059.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	22,164.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	22,164.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	22,164.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7		0.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		7.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		22,171.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

Part VII-A Statements Regarding Activities

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

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► ALEX G. NASON Telephone no. ► 203-856-5299 Located at ► 47 ROBIN HOOD ROAD, STAMFORD, CT ZIP+4 ► 06907			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A			

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here N/A	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ►		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A	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. ►		
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.) N/A	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

6b

X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ALEXANDER G. NASON 47 ROBIN HOOD ROAD STAMFORD, CT 06907	PRESIDENT 40.00	140,700.	53,720.	0.
LUCIE BURKE 4311 SECOND SQUARE SW VERO BEACH, FL 32968	SECRETARY 0.00	0.	0.	0.
ALEXANDER G. NASON 47 ROBIN HOOD ROAD STAMFORD, CT 06907	TREASURER 0.00	0.	0.	0.
VINCENT BURKE 4311 SECOND SQUARE SW VERO BEACH, FL 32968	DIRECTOR 0.00	0.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(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 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3

0.

Form 990-PF (2009)

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	6,376,501.
b	Average of monthly cash balances	1b	2,053,175.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	8,429,676.
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	8,429,676.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	126,445.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,303,231.
6	Minimum investment return. Enter 5% of line 5	6	415,162.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	415,162.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	22,164.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	22,164.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	392,998.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	392,998.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	392,998.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	473,059.
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	473,059.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	473,059.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				392,998.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	76,420.			
b From 2005	188,754.			
c From 2006	308,212.			
d From 2007	85,238.			
e From 2008	116,479.			
f Total of lines 3a through e	775,103.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$	473,059.			
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				392,998.
e Remaining amount distributed out of corpus	80,061.			
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:	855,164.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	76,420.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	778,744.			
10 Analysis of line 9:				
a Excess from 2005	188,754.			
b Excess from 2006	308,212.			
c Excess from 2007	85,238.			
d Excess from 2008	116,479.			
e Excess from 2009	80,061.			

N/A

- ☐ 4942(i)(3) or ☐ 4942(i)(5)

- (4) Gross investment income

Form **990-PF** (2009)

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

Recipient Name and address (home or business)	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
a Paid during the year				
SEE STATEMENT 9				
Total			▶ 3a	337,500.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

Part XVII

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



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

[illegible]

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

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

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

Sign Here	Signature of officer or trustee 		Date 4/30/10	Title PRESIDENT	
	Paid Preparer's Use Only	Preparer's signature 	Date 4/28/10	Check if self-employed <input checked="" type="checkbox"/>	Preparer's identifying number
Firm's name (or yours if self-employed), address, and ZIP code		REYNOLDS & ROWELL LLP 90 GROVE STREET RIDGEFIELD, CT 06877		EIN	Phone no. 203-438-0161

990-PF

916261
04-24-09

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
CHARLES SCHWAB & AMERITRADE	152,780.	0.	152,780.
TOTAL TO FM 990-PF, PART I, LN 4	152,780.	0.	152,780.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PROFESSIONAL FEES	23,534.	11,767.		11,767.
TO FORM 990-PF, PG 1, LN 16B	23,534.	11,767.		11,767.

FORM 990-PF	TAXES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PAYROLL TAXES	8,947.	4,474.		4,473.
FILING FEES	25.	0.		25.
TO FORM 990-PF, PG 1, LN 18	8,972.	4,474.		4,498.

FORM 990-PF	OTHER EXPENSES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DUES & SUBSCRIPTIONS	3,659.	1,829.		1,830.
LIABILITY INSURANCE	4,191.	0.		4,191.
OFFICE EXPENSE	1,800.	900.		900.
TO FORM 990-PF, PG 1, LN 23	9,650.	2,729.		6,921.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	5
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DESCRIPTION	AMOUNT
EXCISE TAX REFUND	11,738.
PRIOR PERIOD ADJUSTMENT	13,527.
TOTAL TO FORM 990-PF, PART III, LINE 3	25,265.

FORM 990-PF	CORPORATE STOCK	STATEMENT	6
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITIES	3,389,979.	3,367,835.
TOTAL TO FORM 990-PF, PART II, LINE 10B	3,389,979.	3,367,835.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	7
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS	COST	400,000.	398,507.
OTHER INVESTMENTS	COST	318,211.	302,400.
TOTAL TO FORM 990-PF, PART II, LINE 13		718,211.	700,907.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	8
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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
COMPUTER	12,655.	11,390.	1,265.
COMPUTER	5,143.	3,909.	1,234.
COMPUTER	2,633.	1,580.	1,053.
OFFICE EQUIPMENT	870.	522.	348.
TOTAL TO FM 990-PF, PART II, LN 14	21,301.	17,401.	3,900.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 9

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
ALDRICH MUSEUM 258 MAIN STREET RIDGEFIELD, CT 06877	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
ARTS FOR HEALING, INC 24 GROVE STREET NEW CANAAN, CT 06840	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
BALLET SCHOOL OF STAMFORD 201 SUMMER ST., 2ND FL STAMFORD, CT 06901	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	5,000.
BROOKLYN ACADEMY OF MUSIC 30 LAFAYETTE AVE BROOKLYN, NY 11217	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
CARING UNLIMITED PO BOX 590 SANFORD, ME 04073	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	5,000.
CHOATE ROSEMARY HALL 333 CHRISTIAN ST WALLINGFORD, CT 06492	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
CHRISTIAN COMMUNITY ACTION OF CT 98 S MAIN ST NORWALK, CT 06854	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
CONNECTICUT FRIENDS SCHOOL 317 NEW CANAAN ROAD WILTON, CT 06897	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	10,000.

ALEX G. NASON FOUNDATION INC.			34-1757149
DIVINE WORD OF MISSIONARIES 1835 WAUKEGAN ROAD TECHNY, IL 60082	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	5,000.
DOCTORS WITHOUT BORDERS 333 7TH AVE, 2ND FL NEW YORK, NY 100015004	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
ENVIRONMENTAL LEARNING CENTER 255 LIVE OAK DR VERO BEACH, FL 32963	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
FRIENDS WITHOUT BORDERS - ANGKOR HOSPITAL FOR CHILDREN 125 BROADWAY #1210 NEW YORK, NY 10010	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
GEORGE WASHINGTON CARVER FOUNDATION 7 ACADEMY STREET NORWALK, CT 06850	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	15,000.
HARBOR BRANCH INSTITUTE 5600 US 1 NORTH FORT PIERCE, FL 34946	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
HIBISCUS CHILDREN'S CENTER 1145 12TH ST VERO BEACH, FL 32960	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
HOMELESS FAMILY CENTER 715 FOURTH PLACE VERO BEACH, FL 32962	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	3,000.
INDIAN RIVER COMMUNITY COLLEGE 3209 VIRGINIA AVE FT PIERCE, FL 349815596	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
INSTITUTE OF NAUTICAL ARCHAEOLOGY PO BOX DRAWER HG COLLEGE STATION, TX 778415137	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	15,000.

MARITIME AQUARIUM AT NORWALK 10 N WATER ST NORWALK, CT 06854	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	30,000.
MIAMI MUSEUM OF CONTEMPORY ART 770 NE 125TH ST NORTH MIAMI, FL 33161	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
NEW CANAAN COUNTRY SCHOOL 545 PONUS RIDGE ROAD, PO BOX 997 NEW CANAAN, CT 06840	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
NEW CANAAN MOUNTED TROOP, INC. 22 CARTER ST NEW CANAAN, CT 06840	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
NEW CANAAN SOCIETY FOR THE ARTS 381 SOUTH AVE NEW CANAAN, CT 06840	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,500.
NORWALK EMERGENCY SHELTER 139 S MAIN STREET NORWALK, CT 06854	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	5,000.
NORWALK NAGAROTE SISTER CITY PO BOX 382 NORWALK, CT 068520382	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
OBEY FOUNDATION PO BOX 4724 WATERBURY, CT 06704	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	12,000.
OCEAN RESEARCH AND CONSRVATION ASSOC 1420 SEAWAY DRIVE, 2ND FL FORT PIERCE, FL 34949	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	5,000.
OXFAM AMERICA 226 CAUSEWAY ST, 5TH FL BOSTON, MA 02114	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.

ALEX G. NASON FOUNDATION INC.

34-1757149

PETA 501 FRONT ST NORFOLK, VA 23510	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
PMC - JIMMY FUND 10 BROOKLINE PLACE WEST, 6TH FL BROOKLINE, MA 024457295	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	2,500.
PROMINDFUL, INC 1177 HIGH RIDGE ROAD STAMFORD, CT 06905	N/A NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	75,000.
RIVERSIDE THEATRE 3250 RIVERSIDE PARK DR. VERO BEACH, FL 32963	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	3,000.
SAVE THE CHILDREN 54 WILTON ROAD WESTPORT, CT 06880	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	5,000.
SILVERMINE GUILD ARTS CENTER 1037 SILVERMINE RD NEW CANAAN, CT 06840	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
SOUND WATERS 1281 COVE ROAD STAMFORD, CT 06902	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
SOUTH HERO LAND TRUST PO BOX 455 SOUTH HERO, VT 05486	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	10,000.
ST DEMETRIOS GREEK ORTHODOX CHURCH 400 SKYWAY DR. CAMARILLO, CA 93010	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
ST EDWARDS SCHOOL 1895 ST. EDWARD'S DR. VERO BEACH, FL 32963	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.

SUN GROVE MONTESSORI 5610 OLEANDER AVE. FORT PIERCE, FL 34982	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	10,000.
SYRACUSE UNIVERSITY SYRACUSE UNIVERSITY SYRACUSE, NY 13244	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	50,000.
TESS PARENT'S ASSOCIATION 206 FOX HILL NORWALK, CT 06851	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
THE SMILE TRAIN 245 5TH AVE, SUITE 2201 NEW YORK, NY 10016	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	2,000.
TRIPLE GEM SOCIETY P.O. BOX 713 PRINCETON, NJ 08542	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	30,000.
VERO BEACH MUSEUM OF ART 3001 RIVERSIDE PARK DR VERO BEACH, FL 32963	NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
VERO BEACH OPERA 49 ROYAL PALM PT VERO BEACH, FL 32960	NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	5,000.
VNA & HOSPICE FOUNDATION 1110 35TH LN. VERO BEACH, FL 32960	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	3,000.
INDIAN RIVER LAND TRUST 1904 12TH COURT VERO BEACH, FL 32960	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.
KAYAK FOR A CAUSE WWW.KAYAKFORACAUSE.COM HUNTINGTON, NY	NONE NON-PROFIT PURPOSES OF ORGANIZATION	501(C)(3)	1,000.

ALEX G. NASON FOUNDATION INC.

34-1757149

KISSES FROM KATIE, INC
56 WENDY ROAD MILFORD, CT 06460

NONE
NON-PROFIT PURPOSES OF
ORGANIZATION

501(C)(3) 5,500.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

337,500.

Form **4562**Department of the Treasury
Internal Revenue Service (99)
Name(s) shown on return**Depreciation and Amortization 990-PF**
(Including Information on Listed Property)

▶ See separate instructions.

▶ Attach to your tax return.

OMB No 1545-0172

2009Attachment
Sequence No **67**

Business or activity to which this form relates

Identifying number

ALEX G. NASON FOUNDATION INC.**FORM 990-PF PAGE 1****34-1757149****Part I Election To Expense Certain Property Under Section 179** Note: If you have any listed property, complete Part V before you complete Part I

1	Maximum amount See the instructions for a higher limit for certain businesses	1	250,000.
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation	3	800,000.
4	Reduction in limitation Subtract line 3 from line 2 If zero or less, enter -0-	4	
5	Dollar limitation for tax year Subtract line 4 from line 1 If zero or less, enter -0- If married filing separately, see instructions	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction Enter the smaller of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2008 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5	11	
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2010 Add lines 9 and 10, less line 12	13	

Note: Do not use Part II or Part III below for listed property. Instead, use Part V

Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property)

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year	14	1,752.
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	2,531.

Part III MACRS Depreciation (Do not include listed property) (See instructions)**Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2009	17	823.
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here		

Section B - Assets Placed in Service During 2009 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only - see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property		1,751.	5 YRS.	HY	200DB	350.
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs		S/L	
h Residential rental property	/		27.5 yrs.	MM	S/L	
	/		27.5 yrs	MM	S/L	
i Nonresidential real property	/		39 yrs	MM	S/L	
	/			MM	S/L	

Section C - Assets Placed in Service During 2009 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs.		S/L	
c 40-year	/		40 yrs	MM	S/L	

Part IV Summary (See instructions)

21	Listed property Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return Partnerships and S corporations - see instr.	22	5,456.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

Part V Listed Property (Include automobiles, certain other vehicles, cellular telephones, certain computers, and property used for entertainment, recreation, or amusement.)**Note:** For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable**Section A - Depreciation and Other Information** (Caution: See the instructions for limits for passenger automobiles)**24a** Do you have evidence to support the business/investment use claimed? ☐ Yes ☐ No **24b** If "Yes," is the evidence written? ☐ Yes ☐ No

(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/ Convention	(h) Depreciation deduction	(i) Elected section 179 cost
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25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use**25****26** Property used more than 50% in a qualified business use

		%						
		%						
		%						

27 Property used 50% or less in a qualified business use

		%				S/L -		
		%				S/L -		
		%				S/L -		

28 Add amounts in column (h), lines 25 through 27 Enter here and on line 21, page 1**28****29** Add amounts in column (i), line 26 Enter here and on line 7, page 1**29****Section B - Information on Use of Vehicles**

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person

If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles

	(a) Vehicle	(b) Vehicle	(c) Vehicle	(d) Vehicle	(e) Vehicle	(f) Vehicle
30 Total business/investment miles driven during the year (do not include commuting miles)						
31 Total commuting miles driven during the year						
32 Total other personal (noncommuting) miles driven						
33 Total miles driven during the year Add lines 30 through 32						
34 Was the vehicle available for personal use during off-duty hours?	Yes No	Yes No	Yes No	Yes No	Yes No	Yes No
35 Was the vehicle used primarily by a more than 5% owner or related person?						
36 Is another vehicle available for personal use?						

Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons.

37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?	Yes	No
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use?		

Note: If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles**Part VI Amortization**

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
42 Amortization of costs that begins during your 2009 tax year					
43 Amortization of costs that began before your 2009 tax year					43
44 Total. Add amounts in column (f). See the instructions for where to report					44