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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

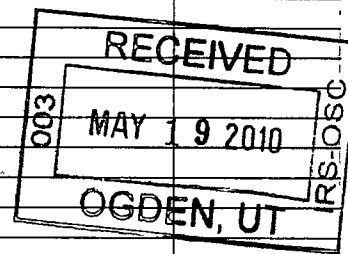
, 2009, and ending

, 20

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 JEAN THOMAS LAMBERT FOUNDATION		A Employer identification number 34-1897221
	Number and street (or P O box number if mail is not delivered to street address) C/O PATRICK J. WESCHLER, 3800 EMBASSY PARKWAY	Room/suite 300	B Telephone number (see page 10 of the instructions) 330-258-6410
	City or town, state, and ZIP code AKRON, OH 44333-8332		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"/> 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"/>
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			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 1,671,825		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)	401,260			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	130	130		
	4 Dividends and interest from securities	26,541	26,541		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	(114,686)			
	b Gross sales price for all assets on line 6a	379,029			
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)	361	361			
12 Total. Add lines 1 through 11	313,606	27,032	N/A		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	26,912	600		26,312
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	10,982			7,845
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)	9,970	9,970		
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	917	588		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy	5,450	122		5,328
	21 Travel, conferences, and meetings	3,322			3,322
	22 Printing and publications				
	23 Other expenses (attach schedule)	4,241	112		4,129
	24 Total operating and administrative expenses. Add lines 13 through 23	61,794	11,392	N/A	46,936
	25 Contributions, gifts, grants paid	222,818			222,818
26 Total expenses and disbursements. Add lines 24 and 25	284,612	11,392	N/A	269,754	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	28,994				
b Net investment income (if negative, enter -0-)		15,640			
c Adjusted net income (if negative, enter -0-)			N/A		



For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

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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		438,063	188,369	188,369
	2 Savings and temporary cash investments				
	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 16 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		1,303	107	107
	10a Investments—U.S. and state government obligations (attach schedule)				
	b Investments—corporate stock (attach schedule)				
	c Investments—corporate bonds (attach schedule)				
	11 Investments—land, buildings, and equipment: basis ▶				
	Less: accumulated depreciation (attach schedule) ▶				
Liabilities	12 Investments—mortgage loans				
	13 Investments—other (attach schedule)		1,146,220	1,426,105	1,483,349
	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)		1,585,586	1,614,581	1,671,825
	17 Accounts payable and accrued expenses				
	18 Grants payable				
Net Assets or Fund Balances	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable (attach schedule)				
	22 Other liabilities (describe ▶)				
	23 Total liabilities (add lines 17 through 22)				
	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24 Unrestricted				
Net Assets or Fund Balances	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		1,585,586	1,614,581	
	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 (see page 17 of the instructions)		1,585,586	1,614,581	
	31 Total liabilities and net assets/fund balances (see page 17 of the instructions)		1,585,586	1,614,581	

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	1,585,586
2 Enter amount from Part I, line 27a	2	28,994
3 Other increases not included in line 2 (itemize) ▶ ROUNDING	3	1
4 Add lines 1, 2, and 3	4	1,614,581
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	1,614,581

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 shares of ABC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)	
1a SEE ATTACHED STATEMENT					
b					
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			(114,686)		
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a					
b					
c					
d					
e					
2 Capital gain net income or (net capital loss)		<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> </div>		2	(114,686)
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):		<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;"> 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 </div> </div>		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.

(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	242,927	1,220,150	1990960
2007	188,050	1,145,088	.1642232
2006	231,483	841,360	.2751295
2005	327,489	698,624	.4687629
2004	310,889	599,505	.5185778
2 Total of line 1, column (d)			2 1,625,787
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 .3251576
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 1,247,204
5 Multiply line 4 by line 3			5 405,528
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 156
7 Add lines 5 and 6			7 405,684
8 Enter qualifying distributions from Part XII, line 4			8 269,754

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 VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the 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	313
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	313
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	313
6	Credits/Payments:		
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	420
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	420
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	107
11	Enter the amount of line 10 to be: Credited to 2010 estimated tax 107 Refunded	11	0

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?		✓
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? <i>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.</i>		✓
c Did the foundation file Form 1120-POL for this year?		✓
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ _____ (2) On foundation managers. ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		✓
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? <i>If "Yes," attach a conformed copy of the changes</i>		✓
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		✓
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? <i>If "Yes," attach the statement required by General Instruction T.</i>		✓
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	✓	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	✓	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ OHIO - see attached explanation		
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 <i>General Instruction G</i> ? <i>If "No," attach explanation</i>		✓
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 on page 27)? <i>If "Yes," complete Part XIV</i>		✓
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		✓

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		✓
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► NONE	13	✓	
14	The books are in care of ► NANCY REYMAN Telephone no. ► 330/376-5300 Located at ► 3800 EMBASSY PARKWAY, SUITE 300, AKRON, OH ZIP+4 ► 44333-8332			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here. ► <input type="checkbox"/> 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? . . . <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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? . . . <input checked="" type="checkbox"/> Yes <input 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)? . . .	1b	✓
Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>		
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	✓
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 ► 20____, 20____, 20____, 20____		
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	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.</i>)	3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	✓
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	✓

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))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2)	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	
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> 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)? (see page 22 of the instructions)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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 page 22 of the instructions)?			5b
Organizations relying on a current notice regarding disaster assistance check here				<input checked="" type="checkbox"/>
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?	<input type="checkbox"/> Yes	<input type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			6b
If "Yes" to 6b, file Form 8870				<input checked="" type="checkbox"/>
7a	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	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?			7b
				N/A

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** (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
SEE ATTACHED SCHEDULE				

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). 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-
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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 NONE	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 24 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	NONE

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	1,056,082
b	Average of monthly cash balances	1b	210,115
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	1,266,197
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	1,266,197
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	18,993
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,247,204
6	Minimum investment return. Enter 5% of line 5	6	62,360

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	62,360
2a	Tax on investment income for 2009 from Part VI, line 5	2a	313
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	0
c	Add lines 2a and 2b	2c	313
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	62,047
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	62,047
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	62,047

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	269,754
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	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	269,754
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	269,754

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				62,047
2 Undistributed income, if any, as of the end of 2009:				
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	281,233			
b From 2005	293,120			
c From 2006	190,122			
d From 2007	132,514			
e From 2008	182,336			
f Total of lines 3a through e	1,079,325			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 269,754				
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				62,047
e Remaining amount distributed out of corpus	207,707			
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	1,287,032			
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)	281,233			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	1,005,799			
10 Analysis of line 9:				
a Excess from 2005	293,120			
b Excess from 2006	190,122			
c Excess from 2007	132,514			
d Excess from 2008	182,336			
e Excess from 2009	207,707			

Part XIV Private 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 foundation is a private operating foundation described in section ☐ 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	
85% of line 2a				
Qualifying distributions from Part XII, line 4 for each year listed				
Amounts included in line 2c not used directly for active conduct of exempt activities				
Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c				
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 $\frac{2}{3}$ 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 XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see page 28 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).)

NONE

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

NONE

- 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**
- Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see 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:

See Attached

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

See Attached

- c** Any submission deadlines:

See Attached

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

See Attached

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 <i>Paid during the year</i> SEE ATTACHED SCHEDULE				222,818
Total			3a	222,818
b <i>Approved for future payment</i> NONE				
Total			3b	-0-

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions.)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue:					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	130	
4	Dividends and interest from securities			14	26,541	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory			18	(114,686)	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue: a SEE ATTACHMENT FOR					
b	PART 1, LINE 11			14	361	
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)				(87,654)	
13	Total. Add line 12, columns (b), (d), and (e)				13	(87,654)

(See worksheet in line 13 instructions on page 28 to verify calculations.)

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

[illegible]

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2009

Name of the organization

JEAN THOMAS LAMBERT FOUNDATION

Employer identification number

34 : 1897221

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

- ☐ 501(c)() (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33⅓% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization
JEAN THOMAS LAMBERT FOUNDATION

Employer identification number
34 : 1897221

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	JEAN THOMAS LAMBERT CLAT, EIN: 31-6630147 C/O PATRICK J. WESCHLER, 3800 EMBASSY PARKWAY SUITE 300, AKRON, OH 44333-8332	\$ 400,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)



STATE OF OHIO
OFFICE OF THE ATTORNEY GENERAL
JIM PEIRO, ATTORNEY GENERAL

Charitable Law
150 E. Gay St., 23rd Floor
Columbus, OH 43215-3130

Telephone: (614) 466-3180
Facsimile: (614) 466-9788
www.ag.state.oh.us

April 2, 2004

Dear Charitable Trustee:

Our records indicate that your organization is registered with the Attorney General pursuant to Ohio's Charitable Trust Act. This letter is being sent to inform you of recent changes to the Administrative Rules and Regulations of Ohio's Charitable Trust Act. **This is not a notification of a delinquency.**

If your organization files a federal form 990, 990-PF or 990-EZ with the Internal Revenue Service, it has been required to file a copy of the federal tax return with our office in the past. However, recent changes to the Administrative Rules now allow organizations headquartered in Ohio to submit the enclosed "VERIFICATION OF FILING WITH THE INTERNAL REVENUE SERVICE" form in lieu of the federal tax return, along with any applicable filing fee. The verification form simply certifies that an organization has submitted the required federal tax return to the Internal Revenue Service. The Internal Revenue Service is now providing the Attorney General with information regarding federal tax filings. Therefore, you will only need to complete the enclosed verification form and return it to our office on or before the fifteenth day of the fifth month following the close of your organization's fiscal tax year, or by any federal extension of time, along with any applicable filing fee. It is important that the required filing fee be postmarked by the financial report due date to avoid assessment of a \$200.00 late fee. Checks should be made payable to "Treasurer, State of Ohio".

If your organization is not based in Ohio, or files a federal form 1041, you will continue to submit a complete copy of your financial return with all attachments, along with any applicable filing fee. Please submit an asset schedule, or you may indicate the fair market value of assets on the federal form 1041.

If your organization had gross receipts of less than twenty-five thousand dollars, or does not otherwise file a federal tax return, you must file the "Annual Financial Report of Charitable Organization." This form is available through our website at www.ag.state.oh.us/ag_forms/charitable_law.htm. If the reported total assets exceed twenty-five thousand dollars, a filing fee is also due. Again, it is important that the required filing fee be postmarked by the financial report due date to avoid assessment of a \$200.00 late fee.

Also available through our website are instructions for filing the Annual Financial Report of Charitable Organization, a copy of Ohio's Charitable Trust Act (Revised Code Chapter 109.23-.33), the revised Administrative Rules and Regulations, the Verification of Filing with the Internal Revenue Service form, and an information sheet which further explains the requirements under this law.

If you do not have access to the Attorney General's website, please contact our office at the telephone number listed below to obtain the required forms.

The Attorney General appreciates your cooperation in complying with these registration requirements. The registry serves to increase public confidence in the integrity of Ohio's charities. If you have any questions, do not hesitate to contact the Charitable Law Section at (614) 466-3180. Thank you for your cooperation and for your work in promoting charitable giving in Ohio.

Sincerely,

JIM PETRO
ATTORNEY GENERAL



Brian C. Cook
Senior Deputy Attorney General
Charitable Law Section
150 East Gay Street, 23rd Floor
Columbus, Ohio 43215-3130
(614) 466-3180

JEAN THOMAS LAMBERT FOUNDATION

EIN: 34-1897221

2009 FORM 990-PF

PART I - ANALYSIS OF REVENUE AND EXPENSES

Line 1 Contributions, gifts, grants, etc. received

Jean Thomas Lambert CLAT, EIN: 31-6630147

(See Sch. B, Part 1, Item 1)

George Richard

Margo Lane

Walton & Pat Silver

Dale & Peggy Koblenzer

Sara Finan

Anne Bigglestone

Deborah Cook

Justin Hardesty

Jean and Pete Wicks

Jim and Missie Broers

Dick and Gindy Smith

Linda & Bill Thomas

(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disburse for charitable purposes
--	---------------------------------	----------------------------	--

400,000

35

50

500

100

25

100

100

100

100

25

25

100

401,260

Line 3 Interest on savings and temporary cash investments

Raymond James (agent)

130

130

JEAN THOMAS LAMBERT FOUNDATION

EIN: 34-1897221

2009 FORM 990-PF

PART I - ANALYSIS OF REVENUE AND EXPENSES

Line 4 Dividends and interest from securities

Raymond James (agent) - interest and dividends

Line 11 Other income

Raymond James (agent) - nondividend distributions
Tyco (\$221) & Freddie Mac (\$12) class action settlements

Line 13 Compensation of officers, directors, trustees, etc.

Nancy Reyman - wages

Line 16 a) Legal fees

Conferences with trustees re: grants and foundation meetings;
review of grant requests, preparation of documents and grant
information for board meetings; preparation of Form 990-PF;
work in connection with Determination Letter request for
scholarship granting authority, manage checkbook.

(a) Revenue and expenses per <u>books</u>	(b) Net investment <u>income</u>	(c) Adjusted net income	(d) Disburse. for charitable <u>purposes</u>
26,541	26,541		
128 <u>233</u> 361	128 <u>233</u> 361		
26,912	600		26,312
10,982			7,845

JEAN THOMAS LAMBERT FOUNDATION

EIN: 34-1897221

2009 FORM 990-PF

PART I - ANALYSIS OF REVENUE AND EXPENSES

Line 16 c) Other professional fees

Raymond James - Investment management fees

Line 18 Taxes

Raymond James - foreign tax
U.S. Treasury - 2005 excise tax
U.S. Treasury - 2009 excise tax

Line 20 Occupancy

Buckingham, Doolittle & Burroughs - rental of office space
McKee Botanical - two months rental of office space

Line 21 Travel, conferences, meetings

Foundation meeting expenses
Conference travel expenses
Ohio Grantmakers Forum - conference fee

	(a) Revenue and expenses per <u>books</u>	(b) Net investment <u>income</u>	(c) Adjusted net <u>income</u>	(d) Disburse. for charitable <u>purposes</u>
	9,970	9,970		
	588	588		
	16	0		
	313	0		
	<u>917</u>	<u>588</u>		
	4,950	110		4,840
	<u>500</u>	<u>11</u>		<u>489</u>
	5,450	122		5,328
	1,629			1,629
	1,233			1,233
	<u>460</u>			<u>460</u>
	3,322			3,322

JEAN THOMAS LAMBERT FOUNDATION

EIN: 34-1897221

2009 FORM 990-PF

PART I - ANALYSIS OF REVENUE AND EXPENSES

Line 23 Other expenses

Raymond James - investment expense on WHMTs	78	78	0
Paychex - payroll administration expenses	1,699		1,699
Ohio AG filing fee	200		200
Council on Foundations - membership fees and resource materials	599		599
Wireless ARC - telephone equipment	723	16	707
Ohio Bureau of Workers Comp - account fee	156		156
The Cincinnati Insurance Co. - business owners policy	375	8	367
Office supplies including toner cartridge, printer, ink, postage			0
domain name annual fee and supplies	411	9	402
	4,241	112	4,129

JEAN THOMAS LAMBERT FOUNDATION
EIN: 34-1897221
2009 FORM 990-PF

PART II BALANCE SHEETS

<u>SHS, PAR VALUE OR UNITS</u>	<u>DESCRIPTION</u>	<u>BOOK VALUE</u>	<u>FAIR MARKET VALUE</u>
LINE 1 - CASH	RAYMOND JAMES CLIENT INTEREST PROGRAM	188,369	188,369
LINE 13 - INVESTMENTS - OTHER			
2,154.241	ARTISAN MID CAP VALUE FUND	34,455	38,733
5,231.587	DODGE & COX INTERNATIONAL	164,051	166,626
796.124	DODGE & COX STOCK FUND	70,842	76,539
5,736.086	EAGLE CAPITAL APPRECIATION	139,261	144,549
3,136.329	EAGLE MID CAP STOCK FUND	72,550	71,822
2,876.190	FIRST EAGLE GLOBAL FUND CLASS A	114,606	114,990
4,595.805	OAKMARK INTERNATIONAL SMALL CAP FUND	49,298	54,644
1,983.473	KEELEY SMALL CAP VALUE FUND M/F	38,212	39,312
4,808.280	LOOMIS SAYLES BOND FUND	55,319	63,902
2,682.482	T. ROWE PRICE INTERNATIONAL DISCOVERY	92,281	99,118
11,479.768	SENTINEL SMALL COMPANY FUND	68,971	72,323
3,243.378	THIRD AVENUE REAL ESTATE VALUE FUND	62,010	66,362
14,483.670	VANGUARD TOTAL BOND MARKET INDEX FUND	149,093	149,906
3,036.335	VANGUARD INFLATION PROTECTED SECURITIES	37,690	38,106

JEAN THOMAS LAMBERT FOUNDATION
EIN: 34-1897221
2009 FORM 990-PF

PART II BALANCE SHEETS

<u>SHS, PAR VALUE OR UNITS</u>	<u>DESCRIPTION</u>	<u>BOOK VALUE</u>	<u>FAIR MARKET VALUE</u>
2,023.000	POWERSHARES GLOBAL ETF AGGREGATE	15,592	27,412
\$ 25,000	VERIZON NEW ENGLAND, INC. DEB	27,095	26,647
\$ 10,000	GE CAPITAL CORP INTERNOTES	10,010	10,031
\$ 10,000	HONEYWELL INTERNATIONAL DEB	13,522	12,709
\$ 15,000	JOHN HANCOCK LIFE INSURANCE CO	14,901	14,858
\$ 30,000	GINNIE MAE POOL #647986	24,346	20,360
\$ 70,000	CAPITAL ONE BANK GLEN ALLEN, VA, 5%	70,000	73,500
3,759.308	RYDEX SGI MANAGED FUTURES STRATEGY	<u>102,000</u>	<u>100,900</u>
TOTAL INVESTMENTS - OTHER		1,426,105	1,483,349
 LINE 15 - OTHER ASSETS			
	2010 PREPAID EXCISE TAX	<u>107</u>	<u>107</u>
	TOTAL ASSETS	<u>1,614,581</u>	<u>1,671,825</u>

JEAN THOMAS LAMBERT FOUNDATION**EIN: 34-1897221****2009 Form 990-PF****Part IV CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

<u>a) List and describe the kinds of property sold</u>	<u>b) How Acquired</u>	<u>c) Date Acquired</u>	<u>d) Date Sold</u>	<u>e) Gross Sales Price</u>	<u>g) Cost or Other Basis</u>	<u>h) Gain or Loss</u>
1,624.01 shs Neuberger Berman Intl	P	Various	8/19/2009	21,495	16,197	5,298
\$100,000 American Chartered Bank	P	1/4/2008	1/26/2009	100,000	100,000	0
952.98 shs Artisan Mid Cap Value Fund	P	Various	8/19/2009	14,980	18,293	(3,313)
\$20,000 CIT Group, Inc.	P	8/19/2005	7/17/2009	7,310	19,300	(11,990)
383.36 shs Dodge & Cox Stock Fund N/L	P	3/6/2008	8/19/2009	32,980	47,118	(14,138)
2,316.97 shs Eagle Capital Apprec. Fund	P	Various	8/19/2009	49,980	61,699	(11,719)
527.98 shs Eagle Stock Fund Class	P	Various	8/19/2009	24,980	34,681	(9,701)

JEAN THOMAS LAMBERT FOUNDATION**EIN: 34-1897221****2009 Form 990-PF****Part IV CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

<u>a) List and describe the kinds of property sold</u>	<u>b) How Acquired</u>	<u>c) Date Acquired</u>	<u>d) Date Sold</u>	<u>e) Gross Sales Price</u>	<u>g) Cost or Other Basis</u>	<u>h) Gain or Loss</u>
\$10,000 Federal Home Loan Mortgage Cor	P	1/4/2008	3/4/2009	10,000	9,975	25
1100 shs JPMorgan Chase Capital XVI Tr	P	8/19/2005	3/4/2009	15,777	28,127	(12,350)
895.36 shs Keeley Small Cap Value Fund CL	P	12/26/2007	8/19/2009	16,000	25,912	(9,912)
3,267.89 shs Neuberger Berman International	P	Various	8/19/2009	43,254	73,613	(30,359)
4,424.78 shs Sentinel Small Company Fund	P	Various	8/19/2009	25,000	33,580	(8,580)
931 shs Third Avenue Real Estate Value	P	Various	8/19/2009	16,980	24,927	(7,947)
Ginnie Mae - Return of of Capital	P	Various	Various	293	293	0
			TOTAL	<u>379,029</u>	<u>493,715</u>	<u>(114,686)</u>

THE JEAN THOMAS LAMBERT FOUNDATION
EIN: 34-1897221

2009 990-PF

PAGE 4, PART VII-A, QUESTION 8b EXPLANATION

The State of Ohio has requested that foundations that must file with its Charitable Law Section file with the state a form entitled "Verification of Filing with the Internal Revenue Service" rather than filing the 990-PF with the state. See attached copy of the letter Ohio foundations received from the Ohio Attorney General's Charitable Law Section.

The Jean Thomas Lambert Foundation will file its 2009 "Verification of Filing with the Internal Revenue Service" form with Ohio the same day that it files its 2009 990-PF with IRS.

JEAN THOMAS LAMBERT FOUNDATION

EIN: 34-1897221

2009 FORM 990-PF

PART VIII - INFORMATION ABOUT OFFICERS, DIRECTORS, TRUSTEE, FOUNDATION MANAGERS, HIGHLY PAID EMPLOYEES AND CONTRACTORS

<u>(a) Name and address</u>	<u>(b) Title, and average hours per week devoted to position</u>	<u>c) Compensation</u>	<u>d) Contri to employee benefit & def comp</u>	<u>e) Expense account, other allowances</u>
NANCY REYMANN 30 S. WHEATON RD., AKRON, OH 44313	PRESIDENT & TRUSTEE - 16 HRS	26,912	0	0
THOMAS LAMBERT 965 23 ROAD, GRAND JUNCTION, CO 81505	TRUSTEE 2 hrs	0	0	0
PATRICK REYMANN 30 S WHEATON RD , AKRON, OH 44313	SECRETARY & TRUSTEE - 2 hrs	0	0	0
ADAM REYMANN 220 SOUTH TAYLOR RD GUNNISON, CO 81230	TRUSTEE 2 hrs	0	0	0

JEAN THOMAS LAMBERT FOUNDATION
EIN: 34-1897221
2009 FORM 990-PF

Part XV - Supplementary Information

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

NOTE: The foundation only makes contributions (other than scholarships, see below) to preselected charitable organizations and does not accept unsolicited requests for funds.

The foundation accepts scholarship applications under the following conditions:

a) Name, address and telephone number of the person to whom applications should be addressed.

Nancy Reymann, President
Jean Thomas Lambert Foundation
3800 Embassy Parkway, Suite 300
Akron, OH 44333-8332
Phone: 330-376-5300

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

Scholarship applicants should obtain scholarship forms from their school guidance counselors/office.

c) Any submission deadlines:

March 15 of year of college entrance

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

Scholarship is available to Summit County, OH high school seniors with at least a 3.0 GPA during their junior and senior years, at least a 20 on their ACT and demonstrated financial need.

JEAN THOMAS LAMBERT FOUNDATION

EIN: 34-1897221

2009 Form 990-PF

PART XV , LINE 3a - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

<u>RECIPIENT NAME AND ADDRESS</u>	<u>IF RECIPIENT IS INDIVIDUAL, SHOW RELATION</u>	<u>FOUNDATION STATUS OF RECIPIENT</u>	<u>PURPOSE OF GRANT OR CONTRIBUTION</u>	<u>AMOUNT</u>
MUSEUM OF NATURAL HISTORY, 1 WADE OVAL DR , UNIVERSITY CIRCLE, CLEVELAND OH 44106-1767	N/A	PUBLIC CHARITY	ANNUAL FUND - GENERAL SUPPORT	5,000
MYELOMA INST - UNIVERSITY OF ARKANSAS FOR MEDICAL SERVICES 4301 WEST MARKHAM, SLOT 816 LITTLE ROCK, ARKANSAS 72205	N/A	PUBLIC CHARITY	ANNUAL FUND - GENERAL SUPPORT	5,000
THE NATURE CONSERVANCY, 3500 LORAIN AVE., SUITE 501, CLEVELAND, OH 44113	N/A	PUBLIC CHARITY	LAND ACQUISITION - GENERAL SUPPORT	20,000
GRAND RIVER PARTNERS, 70 SOUTH PARK PLACE, PAINESVILLE, OH 44077	N/A	PUBLIC CHARITY	ACQUISITION OF LAND IN ASHCROFT WOODS	1,500
McKEE BOTANICAL GARDEN, 350 U S HIGHWAY 1, VERO BEACH, FL 32962	N/A	PUBLIC CHARITY	OPERATING SUPPORT FOR HORTICULTURAL STAFF	2,000

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PART XV, LINE 3a - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	IF RECIPIENT IS INDIVIDUAL, SHOW RELATION	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
CRESTED BUTTE AVALANCHE CENTER P O BOX 1061, CRESTED BUTTE, CO 81224	N/A	PUBLIC CHARITY	AVALANCHE FORECASTING - STAFF TRAINING	3,000
THE BECK CENTER FOR THE ARTS 17801 DETROIT AVE LAKEWOOD, OH 44107	N/A	PUBLIC CHARITY	PURCHASE OF COMPUTER HARDWARE/SOFTWARE - FEASIBILITY STUDY TO TRANSFORM ANNEX BLDG TO DANCE CENTER	20,000
UNITED WAY OF SUMMIT CTY, OH 90 N. PROSPECT ST , AKRON, OH 44304-1273	N/A	PUBLIC CHARITY	UTILITY ASSISTANCE PROGRAM - AMHA EARLY CHILDHOOD INITIATIVE	7,500
AKRON SYMPHONY ORCHESTRA, 17 N BROADWAY ST , AKRON, OH 44308	N/A	PUBLIC CHARITY	ANNUAL FUND - GENERAL SUPPORT	1,000
OHIO HUMANITIES COUNCIL, 471 E BROAD ST SUITE 1620, COLUMBUS, OH 43215-3857	N/A	PUBLIC CHARITY	ANNUAL FUND - GENERAL SUPPORT	1,000

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ST PAUL'S EPISCOPAL CHURCH 1361 W. MARKET ST , AKRON, OH 44313	N/A	PUBLIC CHARITY	GENERAL OPERATING FUND	12,000
CLIFFSIDE ARTS COLLABORATIVE P O BOX 396, HINCKLEY, OH 44233-9301	N/A	TYPE 1 SUPPORTING ORGANIZATION	INTERNSHIP PROGRAM - GENERAL SUPPORT	4,500
WESTERN RESERVE HISTORICAL SOCIETY, 10825 EAST BLVD CLEVELAND, OH 44106	N/A	PUBLIC CHARITY	GENERAL OPERATIONS	30,000
UNIVERSITY CIRCLE, INC , 10831 MAGNOLIA DR , CLEVELAND, OH 44106-1997	N/A	PUBLIC CHARITY	GENERAL SUPPORT	5,000
CASCADE LOCKS PARK ASSN, 248 FERNDALE ST , AKRON, OH 44304	N/A	PUBLIC CHARITY	EDUCATIONAL AND GENERAL SUPPORT	2,000

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OHIO AND ERIE CANAL CANALWAY COALITION, 520 SOUTH MAIN ST., STE 2452, AKRON, OH 44311	N/A	PUBLIC CHARITY	LANDSCAPING AT HOWE HOUSE	25,000
THE PROSTATE CANCER CURE CORP. (dba ONE-IN-SIX FOUNDATION) 106 S MAIN ST , AKRON, OH 44308	N/A	PUBLIC CHARITY	GENERAL SUPPORT	1,000
CAMPUS CRUSADE FOR CHRIST P O BOX 628222, ORLANDO, FL 32862-8222	N/A	PUBLIC CHARITY	ATHLETES IN ACTION MINISTRY	33,000
(AIARE) AMERICAN INSTITUTE FOR AVALANCHE RESEARCH & EDUCATION 211 S TELLER, GUNNISON, CO 81230	N/A	PUBLIC CHARITY	GENERAL SUPPORT	2,500
COLORADO FOURTENNERS INITIATIVE 607 TENTH ST , SUITE 107N, GOLDEN, CO 80401	N/A	PUBLIC CHARITY	GENERAL SUPPORT	1,000

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CHOICES A COMMUNITY SOCIAL CENTER 320 E SOUTH ST., AKRON, OH 44311		PUBLIC CHARITY	GENERAL SUPPORT	3,000
CUYAHOGA VALLEY NATIONAL PARK ASSOC 3675 OAK HILL ROAD, PENINSULA, OH 44264	N/A	PUBLIC CHARITY	RESTORATION FUND FOR HISTORIC HOMES IN NATIONAL PARK FOR USE AS VOLUNTEER CENTER	25,000
HUMANE SOCIETY OF GREATER AKRON 7996 DARROW RD , TWINSBURG, OH 44087	N/A	PUBLIC CHARITY	GENERAL SUPPORT	1,000
DEVONTEE FERGUSON 1510 SUPERIOR AVE, AKRON, OH 44307	NONE	SCHOLARSHIP RECIPIENT	KENT STATE UNIVERSITY TUITION SCHOLARSHIP	<u>11,818</u>
			TOTAL	<u><u>211,000</u></u>