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
WHITE THOMAS H NO 1 T/A 20
-242000931800

Number and street (or P O. box number if mail is not delivered to street address) | Room/suite
KEYBANK 4900 TIEDEMAN RD. OH-01-49-0150

City or town, state, and ZIP code
BROOKLYN, OH 44144-2302

A Employer identification number
34-6505722

B Telephone number (see page 10 of the instructions)
(216) 689-5973

C If exemption application is pending, check here ▶ [ ]
D 1 Foreign organizations, check here ▶ [ ]
2 Foreign organizations meeting the 85% test, check here and attach computation ▶ [ ]
E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ [ ]
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ [ ]

H Check type of organization: [X] Section 501(c)(3) exempt private foundation
[ ] Section 4947(a)(1) nonexempt charitable trust [ ] Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶ $ 20,394,705.

J Accounting method: [X] Cash [ ] Accrual
[ ] Other (specify) ____________
(Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))*

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ▶ [ ] if the foundation is **not** required to attach Sch B				
	3 Interest on savings and temporary cash investments	1,101.	1,101.		STMT 1
	4 Dividends and interest from securities	487,250.	487,250.		STMT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-2,160,042.			
	b Gross sales price for all assets on line 6a -1,060,757.				
	7 Capital gain net income (from Part IV, line 2)				
	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)	52,123.			STMT 3
	12 **Total.** Add lines 1 through 11	-1,619,568.	488,351.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	25,059.	18,794.		6,265.
	14 Other employee salaries and wages		NONE	NONE	
	15 Pension plans, employee benefits		NONE	NONE	
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) STMT 4	5,000.	NONE	NONE	5,000.
	c Other professional fees (attach schedule) STMT 5	89,004.			89,004.
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings		NONE	NONE	
	22 Printing and publications	384.	NONE	NONE	384.
	23 Other expenses (attach schedule) STMT 6	200.			200.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	119,647.	18,794.	NONE	100,853.
	25 Contributions, gifts, grants paid	904,319.			904,319.
	26 **Total expenses and disbursements** Add lines 24 and 25	1,023,966.	18,794.	NONE	1,005,172.
	27 Subtract line 26 from line 12:				
	a **Excess of revenue over expenses and disbursements**	-2,643,534.			
	b **Net investment income** (if negative, enter -0-)		469,557.		
	c **Adjusted net income** (if negative, enter -0-)				

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

		Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments		656,146.	656,146.
	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 ▶ NONE			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10 a 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) ▶			
	12 Investments - mortgage loans			
	13 Investments - other (attach schedule)	24,826,991.	21,527,311.	19,738,559.
	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)	24,826,991.	22,183,457.	20,394,705.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)			
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ ☒			
	27 Capital stock, trust principal, or current funds	24,826,991.	22,183,457.	
	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)	24,826,991.	22,183,457.	
	31 **Total liabilities and net assets/fund balances** (see page 17 of the instructions)	24,826,991.	22,183,457.	

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	24,826,991.
2	Enter amount from Part I, line 27a	2	-2,643,534.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	22,183,457.
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	22,183,457.

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	SEE PART IV DETAIL			
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				
b				
c				
d				
e				

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

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

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7	2	-2,160,042.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8		3	

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	1,333,596.	22,043,219.	0.06049914942
2007	1,419,081.	25,909,281.	0.05477114552
2006	1,264,014.	23,751,605.	0.05321804569
2005	1,282,799.	22,235,390.	0.05769176974
2004	1,152,449.	21,288,544.	0.05413470268

2	**Total** of line 1, column (d)	2	0.28031481305
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.05606296261
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	17,708,308.
5	Multiply line 4 by line 3	5	992,780.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	4,696.
7	Add lines 5 and 6	7	997,476.
8	Enter qualifying distributions from Part XII, line 4	8	1,005,172.

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 ▶ [ ] and enter "N/A" on line 1 . . . Date of ruling or determination letter: ______________ (attach copy of ruling letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b	1	4,696.
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	
3	Add lines 1 and 2	3	4,696.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	NONE
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	4,696.
6	Credits/Payments:		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 6a: 10,000.		
b	Exempt foreign organizations-tax withheld at source — 6b: NONE		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: NONE		
d	Backup withholding erroneously withheld — 6d:		
7	Total credits and payments. Add lines 6a through 6d	7	10,000.
8	Enter any **penalty** for underpayment of estimated tax. Check here [ ] if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	5,304.
11	Enter the amount of line 10 to be: **Credited to 2010 estimated tax** ▶ 5,304. **Refunded** ▶	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?	1a		X
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)?	1b		X
	*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.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
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? *If "Yes," attach a detailed description of the activities.*	2		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*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		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?	6	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.*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ STMT 7			
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*	8b	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 on page 27)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
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		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?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ SEE STATEMENT 8 Telephone no. ▶

Located at ▶ ZIP + 4 ▶

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

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

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

			Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ 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		X
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	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? ☐ Yes ☒ 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 page 20 of the instructions.)	2b		X
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? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2009 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		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)? (see page 22 of the instructions)	☐ 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 page 22 of the instructions)?		**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?	☐ 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 (No)
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?		**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 (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 STATEMENT 9		25,059.	-0-	-0-

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		NONE	NONE	NONE

Total number of other employees paid over $50,000 ▶ NONE

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		NONE

Total number of others receiving over $50,000 for professional services ▶ NONE

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 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See page 24 of the instructions	
3 NONE	
Total. Add lines 1 through 3 ▶	

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	17,977,978.
b	Average of monthly cash balances	1b	NONE
c	Fair market value of all other assets (see page 24 of the instructions)	1c	NONE
d	**Total** (add lines 1a, b, and c)	1d	17,977,978.
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	NONE
3	Subtract line 2 from line 1d	3	17,977,978.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	269,670.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	17,708,308.
6	**Minimum investment return.** Enter 5% of line 5	6	885,415.

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	885,415.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	4,696.		
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	4,696.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	880,719.
4	Recoveries of amounts treated as qualifying distributions			4	NONE
5	Add lines 3 and 4			5	880,719.
6	Deduction from distributable amount (see page 25 of the instructions)			6	NONE
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	880,719.

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	1,005,172.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,005,172.
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	4,696.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	1,000,476.

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				880,719.
2	Undistributed income, if any, as of the end of 2009:				
a	Enter amount for 2008 only			NONE	
b	Total for prior years 20 07 ,20 ___ ,20 ___		NONE		
3	Excess distributions carryover, if any, to 2009:				
a	From 2004 130,702.				
b	From 2005 209,222.				
c	From 2006 134,747.				
d	From 2007 192,956.				
e	From 2008 245,257.				
f	**Total** of lines 3a through e	912,884.			
4	Qualifying distributions for 2009 from Part XII, line 4: ▶ $ 1,005,172.				
a	Applied to 2008, but not more than line 2a			NONE	
b	Applied to undistributed income of prior years (Election required - see page 26 of the instructions)		NONE		
c	Treated as distributions out of corpus (Election required - see page 26 of the instructions)	NONE			
d	Applied to 2009 distributable amount				880,719.
e	Remaining amount distributed out of corpus	124,453.			
5	Excess distributions carryover applied to 2009 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	NONE			NONE
6	**Enter the net total of each column as indicated below:**				
a	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	1,037,337.			
b	Prior years' undistributed income. Subtract line 4b from line 2b		NONE		
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		NONE		
d	Subtract line 6c from line 6b. Taxable amount - see page 27 of the instructions		NONE		
e	Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see page 27 of the instructions			NONE	
f	Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				NONE
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)	NONE			
8	Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	130,702.			
9	**Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a	906,635.			
10	Analysis of line 9:				
a	Excess from 2005 209,222.				
b	Excess from 2006 134,747.				
c	Excess from 2007 192,956.				
d	Excess from 2008 245,257.				
e	Excess from 2009 124,453.				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

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)

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

Part 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).)

N/A

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.

N/A

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 STATEMENT 10

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

SEE ATTACHED STATEMENT FOR LINE 2

c Any submission deadlines:

SEE ATTACHED STATEMENT FOR LINE 2

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

SEE ATTACHED STATEMENT FOR LINE 2

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 11				
Total . . . . ▶ **3a**				904,319.
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

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	1,101.	
4 Dividends and interest from securities			14	487,250.	
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	-2,160,042.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a					
b			1	52,123.	
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				-1,619,568.	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . . . 13 -1,619,568.

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See page 29 of the instructions.)
	NOT APPLICABLE

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

		Yes	No
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?			
a Transfers from the reporting foundation to a noncharitable exempt organization of.			
(1) Cash	1a(1)		X
(2) Other assets	1a(2)		X
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
(3) Rental of facilities, equipment, or other assets	1b(3)		X
(4) Reimbursement arrangements	1b(4)		X
(5) Loans or loan guarantees	1b(5)		X
(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

Sign Here

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

James R Freedline Jr

Signature of officer or trustee KEYBANK BY: J R FREEDLINE | Date 04/27/2010 | Title Vice President

Paid Preparer's Use Only

Preparer's signature	Date	Check if self-employed ☐	Preparer's identifying number (See Signature on page 30 of the instructions)
Firm's name (or yours if self-employed), address, and ZIP code		EIN	
		Phone no.	

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
SHORT-TERM FUNDS		1,101.	1,101.
	TOTAL	1,101.	1,101.

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
ADJ COMMON TRUST FD	487,250.	487,250.
TOTAL	487,250.	487,250.

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS
	TOTALS	52,123.

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
TAX PREPARATION FEE (NON-ALLOC	5,000.			5,000.
TOTALS	5,000.	NONE	NONE	5,000.

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	CHARITABLE PURPOSES
FOUNDATION MGT SRVCS	89,004.	89,004.
TOTALS	89,004.	89,004.

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	CHARITABLE PURPOSES
OTHER NON-ALLOCABLE EXPENSE -	200.	200.
TOTALS	200.	200.

STATE(S) WHERE THE FOUNDATION IS REGISTERED
OH

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		TOTAL SHORT-TERM COMMON TRUST FUND AND PARTNERSHIP, S CORPORATION, AND OTHER ESTATES OR TRUST GAIN OR LOSS					-840,886.	
		TOTAL LONG-TERM COMMON TRUST FUND AND PARTNERSHIP, S CORPORATION, AND OTHER ESTATES OR TRUST GAIN OR LOSS					-1156418.	
		25400. CHARITABLE MULTI ASSET FUND PROPERTY TYPE: SECURITIES					02/18/2000	05/28/2009
249,596.00		315,830.00					-66,234.00	
		62300. CHARITABLE MULTI ASSET FUND PROPERTY TYPE: SECURITIES					02/18/2000	10/01/2009
686,951.00		783,455.00					-96,504.00	
TOTAL GAIN(LOSS)							-2160042.	

FORM 990PF, PART VII-A, LINE 14 - BOOKS ARE IN THE CARE OF
==

NAME: KEYBANK N.A.

ADDRESS: 4900 TIEDEMAN ROAD OH-01-49-0150
BROOKLYN, OH 44144-2302

TELEPHONE NUMBER: (216)813-4556

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

OFFICER NAME:
KEYBANK N.A.
ADDRESS:
127 PUBLIC SQUARE
CLEVELAND, OH 44114
TITLE:
TRUSTEE
AVERAGE HOURS PER WEEK DEVOTED TO POSITION: 10
COMPENSATION .... 25,059.

TOTAL COMPENSATION: 25,059.

FORM 990PF, PART XV - LINES 2a - 2d

====================================

RECIPIENT NAME:
  JANET E. NARTEN
ADDRESS:
  1442 EUCLID AVE., SUITE 6
  CLEVELAND, OH 44115-1953
RECIPIENT'S PHONE NUMBER: 216-696-7273
FORM, INFORMATION AND MATERIALS:
  EXPLAIN PURPOSE OF APPLICANT ORGANIZATION. EXPLAIN THE PROJECT FOR WHICH THE APPLICATION IS BEING MADE. EXPLAIN HOW THE PROJECT WILL BENEFIT RESIDENTS OF THE CITY OF CLEVELAND, OHIO
SUBMISSION DEADLINES:
  APRIL 1, AUGUST 1, DECEMBER 1
RESTRICTIONS OR LIMITATIONS ON AWARDS:
  MUST BENEFIT RESIDENTS OF CITY OF CLEVELAND. INTEREST IS PRE-COLLEGE ED. & YOUTH ENRICHMENT, SEE GUIDELINES ATTACHED.

FORM 990PF, PART XV, LINE 3 - CONTRIBUTIONS, GIFTS, GRANTS PAID

RECIPIENT NAME:
SEE ATTACHED LIST
ADDRESS:
KEYBANK
CLEVELAND, OH 44144
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
SEE ATTACHED SHEET
FOUNDATION STATUS OF RECIPIENT:
PUBLIC
AMOUNT OF GRANT PAID .... 904,319.

TOTAL GRANTS PAID: 904,319.

Thomas H. White Foundation Payments Made - 2009 OBRA Report

12/8/2009

Payee Organization Request Primary Contact Project Title	Amount Check # Paid Date	Deduct Amount	Non- Deduct Amount	Tax Status	Sched. Date	--- Receip
Adoption Network Cleveland Norris, Betsie 4614 Prospect Avenue, Suite 550 Cleveland, OH 44103 *for the Youth Connections program for children aging out of the foster care system*	$10,000 00 6/2/2009	$10,000 00	$0 00	501c(3)		
America SCORES Cleveland Pence-Meyenberg, Debra 1422 Euclid Avenue, Suite 708 Cleveland, OH 44115 *for after-school programming in CMSD schools*	$10,000 00 10/6/2009	$10,000 00	$0 00	501c(3)		
Art House, Inc. Craft, Amy 3119 Denison Avenue Cleveland, OH 44109 *for arts education programming at CMSD schools*	$5,000 00 10/6/2009	$5,000 00	$0 00	501c(3)		
Baldwin-Wallace College Durst, Richard W 275 Eastland Road Berea, OH 44017-2088 *for the Baldwin Wallace Scholars program*	$15,000 00 6/2/2009	$15,000 00	$0 00	501c(3)		
Beech Brook Rex, Debra 3737 Lander Road Cleveland, OH 44124 *for the School-Based Mental Health program*	$15,000 00 6/2/2009	$15,000 00	$0 00	501c(3)		
Bethune-Cookman College Reed, Trudie Kibbe 640 Dr Mary McLead Bethune Boulevard Daytona Beach, FL 32114-3099 *for operating support*	$2,700 00 1/20/2009	$2,700 00	$0 00	501c(3)		

Boys and Girls Clubs of Cleveland Soeder, Ron 6114 Broadway Avenue Cleveland, OH 44127 *for education and career development programs*	$15,000 00 2/17/2009	$15,000 00	$0 00	501c(3)
Boys Hope Girls Hope Conway, Kevin O 9619 Garfield Boulevard Garfield Heights, OH 44125 *for the residential program*	$5,000 00 10/6/2009	$5,000 00	$0 00	501c(3)
Business Volunteers Unlimited Broadbent, Brian 1300 East 9th Street, Suite 1805 Cleveland, OH 44114 *for capacity building services for nonprofits*	$10,000 00 2/17/2009	$10,000 00	$0 00	501c(3)
Case Western Reserve University Snyder, Barbara R 10900 Euclid Avenue Cleveland, OH 44106-4904 *for the Healthy Smiles Dental Sealant program in partnership with the CMSD*	$15,000 00 10/6/2009	$15,000 00	$0 00	501c(3)
Central School of Practical Nursing, Inc. Plocica, Alberta 4600 Carnegie Avenue Cleveland, OH 44103 *for the Adult Learning Seminar*	$8,000 00 2/17/2009	$8,000 00	$0 00	501c(3)
The Children's Museum of Cleveland Redmond, Sandra 10730 Euclid Avenue Cleveland, OH 44106 *to develop Story Time Science, a new education outreach program*	$7,500 00 2/17/2009	$7,500 00	$0 00	501c(3)
Citizens' Academy White, Perry 1827 Ansel Road Cleveland, OH 44106 *for the Extended Learning program, which provides additional instruction for students in literacy and math*	$12,500 00 2/17/2009	$12,500 00	$0 00	501c(3)

City Club of Cleveland Foster, James 850 Euclid Avenue, Floor 2 Cleveland, OH 44114-3304 *for CMSD high school students to attend the Youth Forum Series*	$2,000 00 2/17/2009	$2,000 00	$0 00	501c(3)
City of Cleveland Cox, Michael E 601 Lakeside Avenue, Room 8 Cleveland, OH 44114 *for the Excellence through the Arts program (Eleanor Rainey fiscal sponsor)*	$5,000 00 2/17/2009	$5,000 00	$0 00	Government
City Year Cleveland Faro, Gretchen 526 Superior Avenue E Suite 408 Cleveland, OH 44114 *for programming in CMSD schools*	$10,000 00 10/6/2009	$10,000 00	$0 00	501c(3)
Cleveland Botanical Garden Ronayne, Natalie A 11030 East Boulevard Cleveland, OH 44106 *for the Green Corps Urban Youth programs, an urban agriculture workforce training program*	$10,000 00 6/2/2009	$10,000 00	$0 00	501c(3)
Cleveland Film Society Goodman, Marcie 2510 Market Avenue Cleveland, OH 44113-3434 *for CMSD high school students to participate in FilmSlam at the 33rd Cleveland International Film Festival*	$7,500 00 2/17/2009	$7,500 00	$0 00	501c(3)
Cleveland Foodbank, Inc. Goodman, Anne Campbell 15500 South Waterloo Road Cleveland, OH 44110 *for expansion of the Children's Nutrition Initiative*	$5,000 00 6/2/2009	$5,000 00	$0 00	501c(3)
Cleveland Housing Network, Inc. Curry, Rob 2999 Payne Avenue, Suite 306 Cleveland, OH 44114	$20,000 00 10/6/2009	$20,000 00	$0 00	501c(3)

for the Community Training Center, helping low-income residents gain basic skills				
Cleveland Metropolitan School District Sanders, Eugene 1380 East 6th Street Cleveland, OH 44114 *for a science and technology lab*	$100,000 00 6/2/2009	$100,000 00	$0 00	Government Government
Cleveland Museum of Art Rub, Timothy 11150 East Boulevard Cleveland, OH 44106 *for arts education programming for CMSD students*	$5,000 00 10/6/2009	$5,000 00	$0 00	501c(3)
Cleveland Play House Moore, Kevin 8500 Euclid Avenue Cleveland, OH 44106 *for theatre arts programming for the CMSD*	$5,000 00 2/17/2009	$5,000 00	$0 00	501c(3)
Cleveland Public Theatre Bobgan, Raymond 6415 Detroit Avenue Cleveland, OH 44102 *for the Student Theatre Enrichment program*	$10,000 00 6/2/2009	$10,000 00	$0 00	501c(3)
Cleveland Rape Crisis Center O'Bryan, Megan 526 Superior Avenue, Suite 1400 Cleveland, OH 44114 *for a capacity building initiative that addresses facilities, programs, advocacy, marketing and development*	$15,000 00 2/17/2009	$15,000 00	$0 00	501c(3)
Cleveland Scholarship Programs, Inc. Milano, Christina 200 Public Square, Suite 3820 Cleveland, OH 44114-2321 *for advisory services in the CMSD*	$30,000 00 2/17/2009	$30,000 00	$0 00	501c(3)
Community Assessment & Treatment Services, Inc. Wallace, Roxanne 8415 Broadway Avenue P O Box 27470 Cleveland, OH 44127	$25,000 00 10/6/2009	$25,000 00	$0 00	501c(3)

over 2 years, to build a new residential treatment facility for women				
Community Partnership for Arts and Culture Schorgl, Thomas B	$2,500 00	$2,500 00	$0 00	501c(3)
Tower Press 1900 Superior Avenue, Suite 130 Cleveland, OH 44114	2/17/2009			
for program support				
Community Service Alliance Nichols, Jeff	$7,500 00	$7,500 00	$0 00	501c(3)
29314 Lincoln Rd Bay Village, OH 44140	10/6/2009			
for expansion of the Transitional Jobs Initiative				
Contemporary Youth Orchestra Grossman, Liza	$5,000 00	$5,000 00	$0 00	501c(3)
P O Box 181099 Cleveland Heights, OH 44118-7099	2/17/2009			
for workshops and performances for CMSD students				
Detroit Shoreway Community Development Organization Ramsey, Jeffrey M	$15,000 00	$15,000 00	$0 00	501c(3)
6516 Detroit Avenue, Suite 1 Cleveland, OH 44102	8/25/2009			
for the Gordon Square Arts District (over 2 years)				
Dress for Success Cleveland Felder, Traci E	$10,000 00	$10,000 00	$0 00	501c(3)
2239 East 55th Street Cleveland, OH 44103	10/6/2009			
to provide appropriate workplace clothing for women				
E City Perkins, Deborah E	$5,000 00	$5,000 00	$0 00	501c(3)
7100 Euclid Avenue, Suite 210 Cleveland, OH 44103	10/6/2009			
for entrepreneurship education for low income urban youth				
Facing History and Ourselves Swaim-Fox, Mark	$5,000 00	$5,000 00	$0 00	501c(3)
2495 Lee Boulevard Cleveland Heights, OH 44118	6/2/2009			

for the CMSD to participate in a multimedia exhibition highlighting the difficult choices made in confronting racial and ethnic prejudice				
Foundation Center-Cleveland Glunt Bailie, Cynthia 1422 Euclid Avenue, Suite 1600 Cleveland, OH 44115-2001 *for annual program support*	$3,750 00 6/2/2009	$3,750 00	$0 00	501c(3)
Free Clinic of Greater Cleveland Williams, Danny 12201 Euclid Avenue Cleveland, OH 44106 *for the Teen Clinic*	$10,000 00 2/17/2009	$10,000 00	$0 00	501c(3)
Great Lakes Theater Festival Fee, Charles 1501 Euclid Avenue, Suite 300 Cleveland, OH 44115-2108 *to renovate the Hanna Theatre*	$15,000 00 6/2/2009	$15,000 00	$0 00	501c(3)
Greater Cleveland Volunteers Banish, Joy 4614 Prospect Avenue, Suite 205 Cleveland, OH 44103-4394 *for the Experience Corps program*	$13,000 00 10/6/2009	$13,000 00	$0 00	501c(3)
Hathaway Brown School Christ, William 19600 North Park Boulevard Shaker Heights, OH 44122 *for the Aspire program, an education enrichment program for middle school girls from under-resourced public schools in the Cleveland area*	$10,000 00 6/2/2009	$10,000 00	$0 00	501c(3)
ideastream Wareham, Jerrold F 1375 Euclid Avenue Cleveland, OH 44115-1835 *for children's educational programming and outreach*	$10,000 00 10/6/2009	$10,000 00	$0 00	501c(3)
Julie Billiart School Sister Agnesmarie 4982 Clubside Road Lynhurst, OH 44124	$5,000 00 2/17/2009	$5,000 00	$0 00	501c(3)

for the Social Skills program

Junior Achievement of Greater Cleveland, Inc. Kinsey, Wendy H 1422 Euclid Avenue, Suite 525 Cleveland, OH 44115 *for the K-12 workforce readiness program in the CMSD*	$10,000 00 2/17/2009	$10,000 00	$0 00	501c(3)
Karamu House, Inc. Ashe, Gregory J 2355 East 89th Street Cleveland, OH 44106 *for the Early Childhood Development program*	$10,000 00 10/6/2009	$10,000 00	$0 00	501c(3)
Laurel School Klotz, Ann V One Lyman Circle Shaker Heights, OH 44122 *for the North Star program, a partnership with the CMSD Girls Leadership Academy at Warner School*	$10,000 00 2/17/2009	$10,000 00	$0 00	501c(3)
The Legal Aid Society of Cleveland Cotter, Colleen M 1223 West Sixth Street Cleveland, OH 44113 *for special education legal services including direct representation, outreach, and advocacy*	$12,500 00 6/2/2009	$12,500 00	$0 00	501c(3)
The Maltz Museum of Jewish Heritage Feniger, Judi 2929 Richmond Road Beachwood, OH 44122 *for education outreach programs for CMSD students*	$5,000 00 10/6/2009	$5,000 00	$0 00	501c(3)
Merrick House Timpano, Marie 1050 Starkweather Cleveland, OH 44113 *for a female youth mentoring program*	$10,000 00 2/17/2009	$10,000 00	$0 00	501c(3)
Museum of Contemporary Art-Cleveland (MOCA) Snyder, Jill 8501 Carnegie Avenue Cleveland, OH 44106 *for the School-to-Museum program*	$5,000 00 2/17/2009	$5,000 00	$0 00	501c(3)

Musical Arts Association (Cleveland Orchestra) Hanson, Gary Severance Hall 11001 Euclid Avenue Cleveland, OH 44106 *for education programs*	$5,000 00 2/17/2009	$5,000 00	$0 00	501c(3)
Near West Theatre Morrison-Hrbek, Stephanie 6514 Detroit Avenue Cleveland, OH 44102 *for summer arts programming for youth*	$10,000 00 6/2/2009	$10,000 00	$0 00	501c(3)
New Life Community Ginn, Walter P O Box 201187 Cleveland, OH 44120-8103 *for program support*	$15,000 00 2/17/2009	$15,000 00	$0 00	501c(3)
Ohio Grantmakers Forum Espy, George 37 West Broad Street, Suite 800 Columbus, OH 43215 *for membership renewal*	$2,509 00 2/17/2009	$2,509 00	$0 00	501c(3)
Ohio Grantmakers Forum Espy, George 37 West Broad Street, Suite 800 Columbus, OH 43215 *for a pilot program to encourage, foster and produce significant strategic restructuring plans among nonprofit human service organizations in Cuyahoga County*	$10,000 00 10/6/2009	$10,000 00	$0 00	501c(3)
Opera Cleveland Cole, Will 1422 Euclid Avenue, Suite 1052 Cleveland, OH 44115-2063 *for education and outreach programs for CMSD students*	$7,500 00 10/6/2009	$7,500 00	$0 00	501c(3)
Playhouse Square Foundation Falco, Art 1501 Euclid Avenue, Suite 200 Cleveland, OH 44115-2197	$10,000 00 2/17/2009	$10,000 00	$0 00	501c(3)

for the Partners in Performance program, which provides transportation, tickets and professional development for CMSD students and teachers				
Positive Education Program Fecser, Frank 3100 Euclid Avenue Cleveland, OH 44115 *for renovations to create a new Autism Center*	$25,000 00 10/6/2009	$25,000 00	$0 00	501c(3)
Project: LEARN Peterson, Richard A 2728 Euclid Avenue, Suite 200 Cleveland, OH 44115-2412 *for Education at Work, a partnership with St Vincent Charity Hospital to help hospital employees and neighborhood residents obtain GEDs and enter college*	$25,000 00 8/11/2009	$25,000 00	$0 00	501c(3)
Providence House Leek-Nelson, Natalie A 2037 West 32nd Street Cleveland, OH 44113-4017 *for crisis intervention*	$5,000 00 6/2/2009	$5,000 00	$0 00	501c(3)
Eleanor B. Rainey Memorial Institute Lazar, Lee 1523 East 55th Street Cleveland, OH 44103 *for after-school and Saturday programming*	$5,000 00 2/17/2009	$5,000 00	$0 00	501c(3)
Eleanor B. Rainey Memorial Institute Lazar, Lee 1523 East 55th Street Cleveland, OH 44103 *for a new facility*	$25,000 00 10/6/2009	$25,000 00	$0 00	501c(3)
Roots of American Music (Fairmount Music Education Fund) Richards, Kevin 3475 Fairmount Blvd Cleveland Heights, OH 44118 *for an arts integrated school residency for CMSD students at Mary B Martin School*	$8,000 00 6/2/2009	$8,000 00	$0 00	501c(3)
Scranton Road Ministries Community Development	$10,000 00	$10,000 00	$0 00	501c(3)

Corporation Whitmore, Christopher				
3095 Scranton Road Cleveland, OH 44113	6/2/2009			
for the Youth Jobs Partnership program				
Suicide Prevention Education Alliance Lyden, Pat	$7,500 00	$7,500 00	$0 00	501c(3)
29425 Chagrin Boulevard, Suite 306 Cleveland, OH 44122	10/6/2009			
for suicide prevention education in CMSD high schools				
Towards Employment, Inc. Rizika, Jill	$15,000 00	$15,000 00	$0 00	501c(3)
1255 Euclid Avenue, Suite 300 Cleveland, OH 44115	10/6/2009			
for NetWorks 4 Success, an employment program				
Town Hall of Cleveland Friedrich, Katherine J	$1,000 00	$1,000 00	$0 00	501c(3)
1120 Chester Avenue, Suite 470 Cleveland, OH 44114	10/6/2009			
for CMSD students to attend the lecture series				
United Way of Greater Cleveland Benz, K Michael	$20,000 00	$20,000 00	$0 00	501c(3)
1331 Euclid Avenue Cleveland, OH 44115	10/6/2009			
for early childhood and youth programs				
Vocational Guidance Services Comben, Robert E	$5,000 00	$5,000 00	$0 00	501c(3)
2239 East 55th Street Cleveland, OH 44103-4451	10/6/2009			
for the Pathways II collaboration for vocational rehabilitation services				
Voices for Ohio's Children Swanson, Amy N	$7,500 00	$7,500 00	$0 00	501c(3)
3634 Euclid Avenue, Suite 110 Cleveland, OH 44115	6/2/2009			
for advocacy for early childhood systems of care in Cuyahoga County and Ohio				

WECO Fund, Inc. Henry, Christine E 3209 Chester Avenue Cleveland, OH 44114 *to provide financial coaching services*	$13,310 00 10/6/2009	$13,310 00	$0 00	501c(3)
West Side Catholic Center Skoch, Gerald 3135 Lorain Avenue Cleveland, OH 44113 *for program support*	$12,000 00 10/6/2009	$12,000 00	$0 00	501c(3)
West Side Community House Kolograf, Dawn 9300 Lorain Avenue Cleveland, OH 44102 *to provide after school educational activities, tutoring and homework assistance to children ages 5-12*	$10,250 00 10/6/2009	$10,250 00	$0 00	501c(3)
West Side Ecumenical Ministry Peters, Judith 5209 Detroit Avenue Cleveland, OH 44102 *for technology upgrades for the El Barrio workforce development program*	$9,500 00 2/17/2009	$9,500 00	$0 00	501c(3)
Westside Industrial Retention and Expansion Network Colm, John P 4855 West 130th Street, Suite 1 Cleveland, OH 44135-5137 *for a part-time Youth Development Coach for the School to Career program*	$10,000 00 10/6/2009	$10,000 00	$0 00	501c(3)
Women's Center of Greater Cleveland Chichester, Mary Jane 6209 Storer Avenue Cleveland, OH 44102-3352 *for a tutoring program for school aged children of mothers receiving substance abuse treatment*	$12,500 00 2/17/2009	$12,500 00	$0 00	501c(3)
Young Audiences of Northeast Ohio Dobrzynski, Marsha 13110 Shaker Square, Suite C 203 Cleveland, OH 44120 *for Art is Education, an initiative to implement an arts-*	$35,000 00 10/6/2009	$35,000 00	$0 00	501c(3)

integrated curriculum within the CMSD				
Youth Opportunities Unlimited Rivchun, Carol 1361 Euclid Avenue Cleveland, OH 44115-1819 *for the Jobs for Ohio's Graduates, a drop out prevention program for at-risk students in Cleveland and East Cleveland*	$7,500 00 6/2/2009	$7,500 00	$0 00	501c(3)
YWCA Danforth, Barbara J 4019 Prospect Avenue Cleveland, OH 44103 *to enhance the preschool math and science curriculum*	$15,800 00 10/6/2009	$15,800 00	$0 00	501c(3)
Grand Total (77 items)	$904,319 00	$904,319 00	$0 00	

SCHEDULE D (Form 1041)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

▶ Attach to Form 1041, Form 5227, or Form 990-T. See the instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).

OMB No 1545-0092

2009

Name of estate or trust: WHITE THOMAS H NO 1 T/A 20

Employer identification number: 34-6505722

Note: *Form 5227 filers need to complete only Parts I and II.*

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

	(a) Description of property (Example: 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr.)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a						

b	Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	
2	Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3	Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	-840,886.
4	Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2008 Capital Loss Carryover Worksheet	4	( )
5	**Net short-term gain or (loss).** Combine lines 1a through 4 in column (f). Enter here and on line 13, column (3) on the back ▶	5	-840,886.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

	(a) Description of property (Example: 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a						

b	Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	-162,738.
7	Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8	Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	-1,156,418.
9	Capital gain distributions	9	
10	Gain from Form 4797, Part I	10	
11	Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2008 Capital Loss Carryover Worksheet	11	( )
12	**Net long-term gain or (loss).** Combine lines 6a through 11 in column (f). Enter here and on line 14a, column (3) on the back ▶	12	-1,319,156.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Part III **Summary of Parts I and II**
Caution: *Read the instructions* ***before*** *completing this part.*

			(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
13	**Net short-term gain or (loss)**	13			-840,886.
14	**Net long-term gain or (loss):**				
a	Total for year	14a			-1,319,156.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht.)	14b			
c	28% rate gain	14c			
15	**Total net gain or (loss).** Combine lines 13 and 14a ▶	15			-2,160,042.

Note: *If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and* ***do not*** *complete Part IV. If line 15, column (3), is a net loss, complete Part IV and the* ***Capital Loss Carryover Worksheet,*** *as necessary.*

Part IV **Capital Loss Limitation**

16 Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the **smaller** of:
a The loss on line 15, column (3) **or** b $3,000 . . . 16 (3,000)

Note: *If the loss on line 15, column (3), is more than $3,000,* ***or*** *if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the* ***Capital Loss Carryover Worksheet*** *on page 7 of the instructions to figure your capital loss carryover*

Part V **Tax Computation Using Maximum Capital Gains Rates**

Form 1041 filers. Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), **and** Form 1041, line 22, is more than zero.

Caution: *Skip this part and complete the worksheet on page 8 of the instructions if:*

- *Either line 14b, col. (2) or line 14c, col. (2) is more than zero, or*
- *Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.*

Form 990-T trusts. Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, **and** Form 990-T, line 34, is more than zero. Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col. (2) or line 14c, col. (2) is more than zero.

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)			17			
18	Enter the **smaller** of line 14a or 15 in column (2) but not less than zero	18					
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19					
20	Add lines 18 and 19	20					
21	If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0- ▶	21					
22	Subtract line 21 from line 20. If zero or less, enter -0-			22			
23	Subtract line 22 from line 17. If zero or less, enter -0-			23			
24	Enter the **smaller** of the amount on line 17 or $2,300			24			
25	Is the amount on line 23 equal to or more than the amount on line 24? ☐ **Yes.** Skip lines 25 and 26; go to line 27 and check the "No" box. ☐ **No.** Enter the amount from line 23			25			
26	Subtract line 25 from line 24			26			
27	Are the amounts on lines 22 and 26 the same? ☐ **Yes.** Skip lines 27 thru 30, go to line 31 ☐ **No.** Enter the **smaller** of line 17 or line 22			27			
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)			28			
29	Subtract line 28 from line 27			29			
30	Multiply line 29 by 15% (.15)					30	
31	Figure the tax on the amount on line 23. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)					31	
32	Add lines 30 and 31					32	
33	Figure the tax on the amount on line 17. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)					33	
34	**Tax on all taxable income.** Enter the **smaller** of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)					34	

Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side	Employer identification number
WHITE THOMAS H NO 1 T/A 20	34-6505722

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example. 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo., day, yr)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a 25400. CHARITABLE MULTI ASSET FUND	02/18/2000	05/28/2009	249,596.00	315,830.00	-66,234.00
62300. CHARITABLE MULTI ASSET FUND	02/18/2000	10/01/2009	686,951.00	783,455.00	-96,504.00

6b Total. Combine the amounts in column (f). Enter here and on Schedule D, line 6b . . . . -162,738.00

GAINS AND LOSSES FROM PASS-THRU ENTITIES
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NET SHORT-TERM GAIN (LOSS) FROM PARTNERSHIPS, S CORPORATIONS AND OTHER FIDUCIARIES

COMMON TRUST FUNDS	-840,886.00	
TOTAL NET SHORT-TERM GAIN OR LOSS (ROUNDED)		-840,886.00

NET LONG-TERM GAIN (LOSS) FROM PARTNERSHIPS, S CORPORATIONS AND OTHER FIDUCIARIES

COMMON TRUST FUNDS	-1156418.00	
TOTAL NET LONG-TERM GAIN OR LOSS (ROUNDED)		-1156418.00

CHARITABLE TRUSTS HOLDINGS REPORT

REPORT TAC-CRR41
RUN DATE 2010-01-16
BUS DATE 2010-01-15
PAGE 578
SAR ID TAC000PCRR41

BK-RG-OFF-ACCOUNT ACCOUNT NAME TAX ANALYST/NAME
20-24-200-0931800 THOMAS H WHITE FDN T/A 563 J F MURRAY 216-813-4580
FISCAL YEAR CODE 1231 AS OF 12-31-2009

CUSIP	ASSET NAME	PRINCIPAL MV	INCOME MV	TAX COST	UNITS
7495200A1	KT SHORT TERM DEPOSIT FUND	655,886.52	259.58	656,146.10	656,146.100
995179736	LAKE VIEW CEMETERY LOT #9 PERPETUAL CARE AGREEMENT #D1105	522.50	0.00	522.50	1.000
998156269	CHARITABLE MULTI ASSET FUND	19,738,036.79	0.00	21,526,788.16	1,703,375.745
	*** TOTAL ***	20,394,445.81	259.58	22,183,456.76	2,359,522.845