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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

ENVELOPE POSTMARK DATE AUG 1 2 2010

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

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.

Name of foundation
B. F. WIRT MUSEUM FUND AGENCY
6853007400 / V15945005

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
C/O JPMORGAN CHASE BANK,NA;P.O.BOX 3038

City or town, state, and ZIP code
MILWAUKEE, WI 53201

A Employer identification number
34-6517991

B Telephone number
(414) 977-1210

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 ▶ [ ]

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

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ [ ]

I Fair market value of all assets at end of year (*from Part II, col. (c), line 16*) ▶$ 601,766.

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

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ [ ]

SCANNED AUG 1 9 2010

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

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received			N/A	
	2 Check ▶ [X] if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	36.	36.		STATEMENT 1
	4 Dividends and interest from securities	20,373.	20,373.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<80,493.>			
	b Gross sales price for all assets on line 6a 292,664.				
	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)				
	11 Other income	298.	0.		STATEMENT 3
	12 Total. Add lines 1 through 11	<59,786.>	20,409.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	5,923.	4,146.		1,777.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 4	825.	0.		825.
	c Other professional fees				
	17 Interest				
	18 Taxes STMT 5	98.	98.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 6	200.	0.		200.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	7,046.	4,244.		2,802.
	25 Contributions, gifts, grants paid	26,939.			26,939.
	26 **Total expenses and disbursements.** Add lines 24 and 25	33,985.	4,244.		29,741.
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	<93,771.>			
	b **Net investment income** (if negative, enter -0-)		16,165.		
	c **Adjusted net income** (if negative, enter -0-)			N/A	

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923501 02-02-10 LHA **For Privacy Act and Paperwork Reduction Act Notice, see the instructions.** Form **990-PF** (2009)

14510430 748522 V15945005 2009.03020 B. F. WIRT MUSEUM FUND AGEN V1594501

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year (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	27,450.	30,579.	30,579.
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S. and state government obligations			
	b Investments - corporate stock STMT 7	322,936.	276,969.	314,771.
	c Investments - corporate bonds STMT 8	296,017.	245,063.	256,416.
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers)	646,403.	552,611.	601,766.
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			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ 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 ▶ [X] and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	646,403.	552,611.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	30 **Total net assets or fund balances**	646,403.	552,611.	
	31 **Total liabilities and net assets/fund balances**	646,403.	552,611.	

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	646,403.
2	Enter amount from Part I, line 27a	2	<93,771.>
3	Other increases not included in line 2 (itemize) ▶ RETURN OF CAPITAL ADJUSTMENT	3	10.
4	Add lines 1, 2, and 3	4	552,642.
5	Decreases not included in line 2 (itemize) ▶ MUTUAL FUND TIMING DIFFERENCE	5	31.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	552,611.

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	PUBLICLY TRADED SECURITIES	P		
b	CLASS ACTION SETTLEMENT			
c	CAPITAL GAINS DIVIDENDS			
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	292,647.		373,157.	<80,510.>
b	12.			12.
c	5.			5.
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				<80,510.>
b				12.
c				5.
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	<80,493.>
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8	3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	33,784.	606,536.	.055700
2007	33,099.	694,635.	.047649
2006	32,396.	679,204.	.047697
2005	30,288.	673,503.	.044971
2004	27,136.	674,807.	.040213

2	Total of line 1, column (d)	2	.236230
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	.047246
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	540,068.
5	Multiply line 4 by line 3	5	25,516.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	162.
7	Add lines 5 and 6	7	25,678.
8	Enter qualifying distributions from Part XII, line 4	8	29,741.

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ [ ] 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 ▶ [X] and enter 1% of Part I, line 27b			1	162.
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	162.
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	162.
6	Credits/Payments.				
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	200.		
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	200.
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	38.
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ 0. **Refunded** ▶			11	38.

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 instructions for definition)? *If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*	1b		X
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 ▶ $ 0. (2) On foundation managers ▶ $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	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? N/A	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 instructions) ▶ OH			
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)? *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 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 ▶ JPMORGAN CHASE BANK, N.A. Telephone no ▶214-965-2903

Located at ▶2200 ROSS AVENUE, DALLAS, TX ZIP+4 ▶75201-2787

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 | N/A

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

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

			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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)? N/A	1b		
	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 instructions) N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ ____, ____, ____, ____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ 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.)* N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)? N/A | 5b |

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | 6b | | X |

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? N/A | 7b |

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JPMORGAN CHASE BANK, N.A. P.O. BOX 3038 MILWAUKEE, WI 53201	AGENT 2.00	5,923.	0.	0.
JOHN PENMAN 7108 OAK DR. POLAND, OH 44514	CHAIRMAN 0.00	0.	0.	0.

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

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

Total number of other employees paid over $50,000 ▶ 0

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over $50,000 for professional services ▶ 0

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 N/A	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments**

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

Form **990-PF** (2009)

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes:			
a	Average monthly fair market value of securities		1a	517,785.
b	Average of monthly cash balances		1b	30,507.
c	Fair market value of all other assets		1c	
d	**Total** (add lines 1a, b, and c)		1d	548,292.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0.		
2	Acquisition indebtedness applicable to line 1 assets		2	0.
3	Subtract line 2 from line 1d		3	548,292.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	8,224.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4		5	540,068.
6	**Minimum investment return.** Enter 5% of line 5		6	27,003.

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

1	Minimum investment return from Part X, line 6		1	27,003.
2a	Tax on investment income for 2009 from Part VI, line 5	2a 162.		
b	Income tax for 2009 (This does not include the tax from Part VI)	2b		
c	Add lines 2a and 2b		2c	162.
3	Distributable amount before adjustments Subtract line 2c from line 1		3	26,841.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	26,841.
6	Deduction from distributable amount (see instructions)		6	0.
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1		7	26,841.

Part XII **Qualifying Distributions** (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	29,741.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	29,741.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b	5	162.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	29,579.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				26,841.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			26,939.	
b Total for prior years ___ , ___ , ___		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ $ 29,741.				
a Applied to 2008, but not more than line 2a			26,939.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				2,802.
e Remaining amount distributed out of corpus	0.			
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	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				24,039.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A

1 a 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
2 a 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 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 instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

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

c Any submission deadlines

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

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				
MAHONING VALLEY HISTORICAL SOCIETY, 648 WICK AVENUE YOUNGSTOWN, OH 44502	NONE	PUBLIC CHARITY	PROGRAM SUPPORT	26,939.
Total			▶ 3a	26,939.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

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
	(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	36.	
4 Dividends and interest from securities			14	20,373.	
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	<80,493.>	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a FEDERAL EXCISE TAX					
b REFUND - 12/31/2008			01	298.	
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0.		<59,786.>	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 <59,786.>

(See worksheet in line 13 instructions 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)

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
		N/A	

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

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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

▶ V H. [signature] Ttee 6/2/10 ▶ TRUSTEE

Signature of officer or trustee Date Title

Paid Preparer's Use Only

Preparer's signature ▶ Kathryn Wickow	Date 5/25/10	Check if self-employed ▶ ☐	Preparer's identifying number P00037638
Firm's name (or yours if self-employed), address, and ZIP code ▶ JPMORGAN CHASE BANK, NA - MILWAUKEE P.O. BOX 3038 MILWAUKEE, WI 53201-3038		EIN ▶ 13-4994650	
		Phone no (414) 977-1210	

Form **990-PF** (2009)

923622
02-02-10

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
MONEY MARKET FUNDS	36.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	36.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDENDS & INTEREST	20,378.	5.	20,373.
TOTAL TO FM 990-PF, PART I, LN 4	20,378.	5.	20,373.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
FEDERAL EXCISE TAX REFUND - 12/31/2008	298.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	298.	0.	

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION FEES	825.	0.		825.
TO FORM 990-PF, PG 1, LN 16B	825.	0.		825.

FORM 990-PF TAXES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES WITHHELD	98.	98.		0.
TO FORM 990-PF, PG 1, LN 18	98.	98.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OHIO ATTY GENERAL FEE	200.	0.		200.
TO FORM 990-PF, PG 1, LN 23	200.	0.		200.

FORM 990-PF CORPORATE STOCK STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE - EQUITIES	276,969.	314,771.
TOTAL TO FORM 990-PF, PART II, LINE 10B	276,969.	314,771.

FORM 990-PF CORPORATE BONDS STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE - FIXED INCOME	245,063.	256,416.
TOTAL TO FORM 990-PF, PART II, LINE 10C	245,063.	256,416.

RICHARD CORDRAY

OHIO ATTORNEY GENERAL

VERIFICATION OF FILING WITH THE INTERNAL REVENUE SERVICE

This form is to be completed by 501(c)(3) non-profit organizations, located in Ohio, that file one of the federal tax forms listed below. NOTE: This form should be filed in lieu of a copy of the federal tax return. Do not submit the federal return with this form.

I hereby certify that I am a trustee or officer of

B. F. WIRT MUSEUM FUND AGENCY 6853007400 / V15945005

(Name of Organization as filed with the Attorney General's Office)

C/O JPMORGAN CHASE BANK, N.A.; PO BOX 3038 MILWAUKEE,WI 53201

Charity Street Address City Zip Code

34-6517991

(Federal Employer Identification Number) (State Charter Number if applicable)

and that the above named organization completed and/or will complete and file: (check one)

☐ **Form 990** ☒ **Form 990-PF** ☐ **Form 990-EZ** ☐ **Form 990-N (e-Postcard)**

required by the Internal Revenue Service for the: (check and complete one of the following)

☒ calendar year 2 009

☐ tax year beginning ______, 2 ____ , and ending ______, 2____

and that such filing occurred on/or will occur on MAY 10, 2010.
(Filing Date)

Did the organization request a federal extension of time to file this report? ☐ Y ☒ N

If yes, what was/is the extended due date? ______
(Federal Extended Due Date)

For fee purposes, please indicate the current total value of assets, or if filing this form prior to an extended federal due date, estimate the current total value of assets, at year end $ 601,766.00

Name of Trustee/Officer (Please Print)

(414) 977-1210
Telephone number

Signature of Trustee/Officer

N/A
Charitable Organizational E-mail Address

Trustee/Officer Title

OFFICE USE ONLY
FILING FEE PAID

Date

Amount ______
Date ______
Check # ______

VFIRS/Revised 6/09

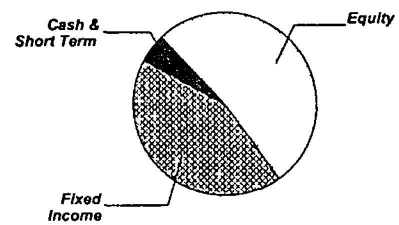
J.P.Morgan

B.F. WIRT MUSEUM FD AGCY ACCT V15945005
For the Period 12/1/09 to 12/31/09

Account Summary

Asset Allocation	Beginning Market Value	Ending Market Value	Change In Value	Estimated Annual Income	Current Allocation
Equity	308,861 53	314,770 78	5,909 25	5,174 06	52%
Cash & Short Term	33,314 86	30,578 63	(2,736 23)	21 39	5%
Fixed Income	255,760 19	256,415 92	655 73	13,880 52	43%
Market Value	**$597,936.58**	**$601,765.33**	**$3,828.75**		**100%**
Accruals	919 54	947 57	28 03		
Market Value with Accruals	**$598,856.12**	**$602,712.90**	**$3,856.78**		

Asset Allocation



Portfolio Activity	Current Period Value	Year-to-Date Value
Beginning Market Value	**597,936.58**	**0.00**
Contributions		28,753 05
Withdrawals & Fees	(2,818 80)	(9,439 77)
Securities Transferred In		565,578 67
Net Contributions/Withdrawals	**($2,818.80)**	**$584,891.95**
Income & Distributions	3,978 90	5,376 59
Change In Investment Value	2,668 65	11,496 79
Ending Market Value	**$601,765.33**	**$601,765.33**
Accruals	947 57	947 57
Market Value with Accruals	**$602,712.90**	**$602,712.90**

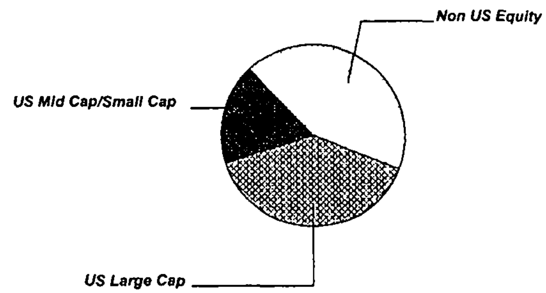
J.P.Morgan

B.F. WIRT MUSEUM FD AGCY ACCT V15945005
For the Period 12/1/09 to 12/31/09

Equity Summary

Asset Categories	Beginning Market Value	Ending Market Value	Change In Value	Current Allocation
US Large Cap	119,225 67	122,067 46	2,841 79	20%
US Mid Cap/Small Cap	54,408 85	56,694 72	2,285 87	9%
Non US Equity	135,227 01	136,008 60	781 59	23%
Total Value	**$308,861.53**	**$314,770.78**	**$5,909.25**	**52%**

Asset Categories



Market Value/Cost	Current Period Value
Market Value	314,770 78
Tax Cost	276,969 11
Unrealized Gain/Loss	37,801 66
Estimated Annual Income	5,174 06
Accrued Dividends	145 03
Yield	1 64 %

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Equity Detail

	Quantity	Price	Market Value	Tax Cost	Unrealized Gain/Loss	Estimated Annual Income / Accrued Dividends	Yield
US Large Cap							
JPMORGAN TR I GROWTH ADVANTAGE FUND SELECT SHARE CLASS FUND 1567 4812A3-71-8 JGAS X	2,177 700	7 27	15,831 88	12,500 00	3,331 88		
ABBOTT LABORATORIES 002824-10-0 ABT	34 000	53 99	1,835 66	1,750 45	85 21	54 40	2 96%
ADVANCED AUTO PARTS INC 00751Y-10-6 AAP	10 000	40 48	404 80	326 49	78 31	2 40 0 60	0 59%
AETNA INC 00817Y-10-8 AET	25 000	31 70	792 50	798 84	(6 34)	1 00	0 13%
AFLAC INC 001055-10-2 AFL	10 000	46 25	462 50	439 46	23 04	11 20	2 42%
AMAZON COM INC 023135-10-6 AMZN	3 000	134 52	403 56	249 08	154 48		
ANADARKO PETROLEUM CORP 032511-10-7 APC	5 000	62 42	312 10	217 48	94 62	1 80	0 58%
APACHE CORP 037411-10-5 APA	11 000	103 17	1,134 87	1,067 43	67 44	6 60	0 58%
APPLE INC. 037833-10-0 AAPL	8 000	210 73	1,685 86	1,226 27	459 58		
APPLIED MATERIALS INC 038222-10-5 AMAT	60 000	13 94	836 40	790 77	45 63	14 40	1 72%

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	Quantity	Price	Market Value	Tax Cost	Unrealized Gain/Loss	Estimated Annual Income / Accrued Dividends	Yield
US Large Cap							
AT&T INC 00206R-10-2 T	40 000	28 03	1,121 20	1,562 29	(441 09)	67 20	5 99%
BANK OF AMERICA CORP 060505-10-4 BAC	104 000	15 06	1,566 24	3,085 04	(1,518 80)	4 16	0 27%
BANK OF NEW YORK MELLON CORP 064058-10-0 BK	35 000	27 97	978 95	1,446 79	(467 84)	12 60	1 29%
BAXTER INTERNATIONAL INC 071813-10-9 BAX	10 000	58 68	586 80	470 54	116 26	11 60 2 90	1 98%
BB & T CORP 054937-10-7 BBT	15 000	25 37	380 55	276 48	104 07	9 00	2 36%
BOEING CO 097023-10-5 BA	5 000	54 13	270 65	333 81	(63.16)	8 40	3 10%
BRISTOL MYERS SQUIBB CO 110122-10-8 BMY	30 000	25 25	757 50	654 06	103 44	38 40 9 60	5 07%
CARDINAL HEALTH INC 14149Y-10-8 CAH	10 000	32 24	322 40	246 94	75 46	7 00 1 75	2 17%
CATERPILLAR INC 149123-10-1 CAT	5 000	56 99	284 95	155 53	129 42	8 40	2 95%
CELGENE CORPORATION 151020-10-4 CELG	20 000	55 68	1,113 60	963 56	150 04		
CHEVRON CORP 166764-10-0 CVX	15 000	76 99	1,154 85	1,006 15	148 70	40 80	3 53%
CISCO SYSTEMS INC 17275R-10-2 CSCO	95 000	23 94	2,274 30	2,344 32	(70 02)		

	Quantity	Price	Market Value	Tax Cost	Unrealized Gain/Loss	Estimated Annual Income Accrued Dividends	Yield
US Large Cap							
CITIGROUP INC 172967-10-1 C	160 000	3 31	529 60	671 66	(142 06)		
COACH INC 189754-10-4 COH	10 000	36 53	365 30	340 61	24 69	3 00	0 82%
COCA COLA CO 191216-10-0 KO	10 000	57 00	570 00	575 29	(5 29)	16 40	2 88%
COMCAST CORP CL A 20030N-10-1 CMCS A	25 000	16 86	421 50	424 57	(3 07)	9 45	2 24%
CONOCOPHILLIPS 20825C-10-4 COP	20 000	51 07	1,021 40	937 74	83 66	40 00	3 92%
CORNING INC 219350-10-5 GLW	55 000	19 31	1,062 05	1,029 28	32 77	11 00	1 04%
CVS/CAREMARK CORPORATION 126650-10-0 CVS	40 000	32.21	1,288 40	1,275 35	13 05	12 20	0 95%
DEERE & CO 244199-10-5 DE	20 000	54 09	1,081 80	778 41	303 39	22 40 5 60	2 07%
DEVON ENERGY CORP 25179M-10-3 DVN	14 000	73 50	1,029 00	878 03	150 97	8 96	0 87%
DOW CHEMICAL CO 260543-10-3 DOW	35 000	27 63	967 05	471 08	495 97	21 00 5 25	2 17%
EATON VANCE SPL INVT TR VALUE FD CL I 277905-64-2 EILV X	24 349	16 78	408 58	329 35	79 23	6 28	1 54%

	Quantity	Price	Market Value	Tax Cost	Unrealized Gain/Loss	Estimated Annual Income / Accrued Dividends	Yield
US Large Cap							
EDISON INTERNATIONAL 281020-10-7 EIX	30 000	34 78	1,043 40	1,094 82	(51 42)	37 80 9 45	3 62%
EMERSON ELECTRIC CO 291011-10-4 EMR	15 000	42 60	639 00	546.98	92 02	20 10	3 15%
EOG RESOURCES INC 26875P-10-1 EOG	5 000	97 30	486 50	338 39	148 11	2 90	0 60%
EXXON MOBIL CORP 30231G-10-2 XOM	27 000	68 19	1,841 13	2,372 34	(531 21)	45 36	2 46%
FREEPORT-MCMORAN COPPER & GOLD INC CL B 35671D-85-7 FCX	15 000	80 29	1,204 35	1,105 32	99 03	9 00	0 75%
GENERAL MILLS INC 370334-10-4 GIS	5 000	70 81	354 05	302 09	51 96	9 80	2 77%
GILEAD SCIENCES INC 375558-10-3 GILD	15 000	43 27	649 05	703 63	(54 58)		
GOLDMAN SACHS GROUP INC 38141G-10-4 GS	10 000	168 84	1,688 40	1,270 13	418 27	14 00	0 83%
GOOGLE INC CL A 38259P-50-8 GOOG	4 000	619 98	2,479 92	1,647 13	832 79		
HEWLETT-PACKARD CO 428236-10-3 HPQ	58 000	51 51	2,987 58	1,378 97	1,608 61	18 56 4 64	0 62%
HONEYWELL INTERNATIONAL INC 438516-10-6 HON	10 000	39 20	392 00	411 04	(19 04)	12 10	3 09%

	Quantity	Price	Market Value	Tax Cost	Unrealized Gain/Loss	Estimated Annual Income Accrued Dividends	Yield
US Large Cap							
INTERNATIONAL GAME TECHNOLOGY 459902-10-2 IGT	10 000	18 77	187 70	152 10	35 60	2 40 0 60	1 28%
INTERNATIONAL BUSINESS MACHINES CORP 459200-10-1 IBM	9 000	130 90	1,178 10	743 44	434 66	19 80	1 68%
IVY LARGE CAP GROWTH FUND - I 466001-20-3 IYGI X	525 652	11 65	6,123 85	5,036 42	1,087 43	36 79	0 60%
JOHNSON CONTROLS INC 478366-10-7 JCI	40 000	27 24	1,089 60	821 47	268 13	20 80 5 20	1 91%
JPMORGAN INTREPID AMERICA FUND SELECT SHARE CLASS FUND 1206 4812A2-10-8 JPIA X	688 752	20 31	13,988 55	15,294 71	(1,306 15)	264 48	1 89%
JUNIPER NETWORKS INC 48203R-10-4 JNPR	30 000	26 67	800 10	589 61	210 49		
MASTERCARD INC - CLASS A 57636Q-10-4 MA	2 000	255 98	511 96	365 62	146 34	1 20	0 23%
MERCK & CO INC 58933Y-10-5 MRK	50 000	36 54	1,827 00	1,644 72	182 28	76 00 19 00	4 16%
METLIFE INC 59156R-10-8 MET	10 000	35 35	353 50	288 17	65 33	7 40	2 09%
MICROSOFT CORP 594918-10-4 MSFT	122 000	30 48	3,718 56	3,112 26	606 30	63 44	1 71%
MONSANTO CO 61166W-10-1 MON	5 000	81 75	408 75	585 97	(177 22)	5 30	1 30%

	Quantity	Price	Market Value	Tax Cost	Unrealized Gain/Loss	Estimated Annual Income / Accrued Dividends	Yield
US Large Cap							
MORGAN STANLEY 617446-44-8 MS	32 000	29 60	947 20	943 95	3 25	6 40	0 68%
NATIONAL SEMICONDUCTOR CORP 637640-10-3 NSM	20 000	15.36	307 20	247 30	59 90	6 40 1 60	2 08%
NETAPP INC 64110D-10-4 NTAP	10 000	34 36	343 60	156 54	187 06		
NIKE INC B 654106-10-3 NKE	10 000	66 07	660 70	588 31	72 39	10 80 2 70	1 63%
NORFOLK SOUTHERN CORP 655844-10-8 NSC	45 000	52 42	2,358 90	2,092 75	266 15	61 20	2 59%
OCCIDENTAL PETROLEUM CORP 674599-10-5 OXY	20 000	81 35	1,627 00	1,354 84	272 16	26 40 6 60	1 62%
ORACLE CORP 68389X-10-5 ORCL	35 000	24 53	858 55	733 90	124 65	7 00	0 82%
PACCAR INC 693718-10-8 PCAR	20 000	36 27	725 40	698 83	26 57	7 20	0 99%
PARKER-HANNIFIN CORP 701094-10-4 PH	10 000	53 88	538 80	450 18	88 62	10 00	1 86%
PAYCHEX INC 704326-10-7 PAYX	10 000	30 64	306 40	263 78	42 62	12 40	4 05%
PEPSICO INC 713448-10-8 PEP	20 000	60 80	1,216 00	1,327 05	(111 05)	36 00 9 00	2 96%
PFIZER INC 717081-10-3 PFE	105 000	18 19	1,909 95	1,535 13	374 82	75 60	3 96%

US Large Cap

	Quantity	Price	Market Value	Tax Cost	Unrealized Gain/Loss	Estimated Annual Income / Accrued Dividends	Yield
PHILIP MORRIS INTERNATIONAL 718172-10-9 PM	23 000	48 19	1,108 37	973 40	134 97	53 36 13 34	4 81%
PRAXAIR INC 74005P-10-4 PX	8 000	80 31	642 48	570 84	71 64	12 80	1 99%
PROCTER & GAMBLE CO 742718-10-9 PG	40 000	60 63	2,425 20	2,460 74	(35 54)	70 40	2 90%
PRUDENTIAL FINANCIAL INC 744320-10-2 PRU	15 000	49.76	746 40	567 62	178 78	10 50	1 41%
QUALCOMM INC 747525-10-3 QCOM	30 000	46 26	1,387 80	1,190 86	196 94	20 40	1 47%
SCHLUMBERGER LTD 806857-10-8 SLB	15 000	65 09	976 35	615 80	360 55	12 60 3 15	1 29%
SOUTHERN CO 842587-10-7 SO	15 000	33 32	499 80	441 43	58 37	26 25	5 25%
SOUTHWESTERN ENERGY CO 845467-10-9 SWN	5 000	48 20	241 00	215 95	25 05		
SPRINT NEXTEL CORP 852061-10-0 S	80 000	3 66	292 80	328 40	(35 60)		
STAPLES INC 855030-10-2 SPLS	40 000	24 59	983 60	844 48	139 12	13 20 3 30	1 34%
STARWOOD HOTELS & RESORTS 85590A-40-1 HOT	20 000	36 57	731 40	429 54	301 86	4 00 4 00	0 55%
SYSCO CORP 871829-10-7 SYY	20 000	27 94	558 80	629 15	(70 35)	20 00 5 00	3 58%

	Quantity	Price	Market Value	Tax Cost	Unrealized Gain/Loss	Estimated Annual Income / Accrued Dividends	Yield
US Large Cap							
TD AMERITRADE HOLDING CORPORATION 87236Y-10-8 AMTD	15 000	19 38	290 70	267 70	23 00		
TIME WARNER INC NEW 887317-30-3 TWX	43 000	29 14	1,253 02	1,079 06	173 96	32 25	2 57%
UNITED TECHNOLOGIES CORP 913017-10-9 UTX	20 000	69 41	1,388 20	1,165 90	222 30	30 80	2 22%
URBAN OUTFITTERS INC 917047-10-2 URBN	10 000	34 99	349 90	152 27	197 63		
US BANCORP DEL 902973-30-4 USB	45 000	22 51	1,012 95	1,263 56	(250 61)	9 00 2 25	0 89%
V F CORP 918204-10-8 VFC	5 000	73 24	366.20	288 44	77 76	12 00	3 28%
VERIZON COMMUNICATIONS INC 92343V-10-4 VZ	48 000	33 13	1,590 24	1,728 95	(138 71)	91 20	5 73%
WAL MART STORES INC 931142-10-3 WMT	22 000	53 45	1,175 90	1,051 35	124 55	23 98 6 00	2 04%
WALT DISNEY CO 254687-10-6 DIS	60 000	32 25	1,935 00	1,596 83	338 17	21 00 21 00	1 09%
WELLPOINT INC 94973V-10-7 WLP	5 000	58 29	291 45	266 76	24 69		
WELLS FARGO & CO 949746-10-1 WFC	55 000	26 99	1,484 45	1,327 49	156 96	11 00	0 74%
XILINX CORP 983919-10-1 XLNX	25 000	25 06	626 50	541 34	85 16	16 00	2 55%

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	Quantity	Price	Market Value	Tax Cost	Unrealized Gain/Loss	Estimated Annual Income / Accrued Dividends	Yield
US Large Cap							
YUM BRANDS INC 988498-10-1 YUM	20 000	34 97	699 40	717 54	(18 14)	16 80	2 40%
Total US Large Cap			**$122,067.46**	**$110,536.44**	**$11,531.02**	**$1,884.22** **$142.53**	**1.54%**
US Mid Cap/Small Cap							
ISHARES COHEN & STEERS REALTY MAJORS INDEX FUND 464287-56-4 ICF	124 000	52 52	6,512 48	5,846 60	665 88	240 06	3 69%
ISHARES RUSSELL MIDCAP INDEX FUND 464287-49-9 IWR	75 000	82 51	6,188 25	5,931 00	257 25	122 25	1.98%
ISHARES RUSSELL 2000 INDEX FUND 464287-65-5 IWM	50 000	62 44	3,122 00	2,920 50	201 50	50 65	1 62%
JPMORGAN MARKET EXPANSION INDEX FUND SELECT SHARE CLASS FUND 3708 4812C1-63-7 PGMI X	1,548 045	8 68	13,437 03	10,340 05	3,096 98	181 12	1 35%
JPMORGAN SMALL CAP GROWTH FUND SELECT SHARE CLASS FUND 3136 4812C0-57-1 OGGF X	581 273	8 71	5,062 89	5,356 39	(293 50)		
JPMORGAN SMALL CAP VALUE FUND SELECT SHARE CLASS FUND 3712 4812C1-79-3 PSOP X	326 424	15 19	4,958 38	5,879 55	(921 17)	78 01	1 57%

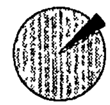
	Quantity	Price	Market Value	Tax Cost	Unrealized Gain/Loss	Estimated Annual Income Accrued Dividends	Yield
US Mid Cap/Small Cap							
JPMORGAN TR I HIGHBRIDGE STATISTICAL MARKET NEUTRAL FUND SELECT SHARES FUND # 1011 4812A2-43-9 HSKS X	1,093 297	15 74	17,208 49	18,000 00	(791 51)	36 07	0 21%
KB HOME 48666K-10-9 KBH	15 000	13 68	205 20	250 93	(45 73)	3 75	1 83%
Total US Mid Cap/Small Cap			**$56,694.72**	**$54,525.02**	**$2,169.70**	**$711.91**	**1 26%**
Non US Equity							
ACE LTD NEW H0023R-10-5 ACE	10 000	50 40	504 00	444 94	59 06	12 40	2 46%
ARTIO INTERNATIONAL EQUITY II - I 04315J-83-7 JETI X	2,645 592	11 78	31,165 07	25,959 49	5,205 58	1,531 79	4 92%
COOPER INDUSTRIES PLC CL - A G24140-10-8 CBE	10 000	42 64	426 40	334 22	92 18	10 00 2 50	2 35%
COVIDIEN PLC G2554F-10-5 COV	20 000	47 89	957 80	738 74	219 06	14 40	1 50%
ISHARES MSCI EAFE INDEX FUND 464287-46-5 EFA	106 000	55 28	5,859 68	5,920 41	(60 73)	152 74	2 61%
JPMORGAN ASIA EQUITY FUND SELECT SHARE CLASS FUND 1134 4812A0-70-6 JPAS X	1,018 755	31 20	31,785 16	26,727 56	5,057 59	117 15	0 37%

	Quantity	Price	Market Value	Tax Cost	Unrealized Gain/Loss	Estimated Annual Income Accrued Dividends	Yield
Non US Equity							
JPMORGAN INTERNATIONAL VALUE FUND SELECT SHARE CLASS FUND 1296 4812A0-56-5 JIES X	1,632 842	12 68	20,704 44	15,739 16	4,965 28	501 28	2 42%
JPMORGAN INTREPID INTERNATIONAL FUND SELECT SHARE CLASS FUND # 1321 4812A2-21-5 JISI X	502 019	15 73	7,896 76	10,596 36	(2,699 60)	132 03	1 67%
NUVEEN NWQ VALUE OPPORTUNITIES FUND 67064Y-63-6 NVOR X	931 132	29 76	27,710 49	18,306 25	9,404 24	106 14	0 38%
SPDR GOLD TRUST 78463V-10-7 GLD	80 000	107 31	8,584 80	6,719 20	1,865 60		
TRANSOCEAN INC H8817H-10-0 RIG	5 000	82 80	414 00	421 32	(7 32)		
Total Non US Equity			**$136,008.60**	**$111,907.65**	**$24,100.94**	**$2,577.93** **$2.50**	**1.90%**

Cash & Short Term Summary

Asset Categories	Beginning Market Value	Ending Market Value	Change In Value	Current Allocation
Cash	33,314 86	30,578 63	(2,736 23)	5%

Asset Categories



Market Value/Cost	Current Period Value
Market Value	30,578 63
Tax Cost	30,578 63
Estimated Annual Income	21 39
Accrued Interest	1 92
Yield	0 07%

Note [1] This is the Annual Percentage Yield (APY) which is the rate earned if balances remain on deposit for a full year with compounding, there is no change in the interest rate and all interest is left in the account

Cash & Short Term Detail

	Quantity	Price	Market Value	Tax Cost Adjusted / Original	Unrealized Gain/Loss	Estimated Annual Income / Accrued Interest	Yield
Cash							
US DOLLAR PRINCIPAL	26,711 85	1 00	26,711 85	26,711 85		18 69	0 07 % [1]
US DOLLAR INCOME	3,866 78	1 00	3,866 78	3,866 78		2 70 1 92	0 07 % [1]
Total Cash			**$30,578.63**	**$30,578.63**	**$0.00**	**$21.39** **$1.92**	**0.07 %**

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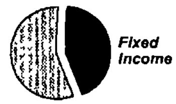
Fixed Income Summary

Asset Categories	Beginning Market Value	Ending Market Value	Change In Value	Current Allocation
US Fixed Income - Taxable	255,760 19	256,415 92	655 73	43%

Asset Categories



Market Value/Cost	Current Period Value
Market Value	256,415 92
Tax Cost	245,062 67
Unrealized Gain/Loss	11,353 25
Estimated Annual Income	13,880 52
Accrued Interest	800 62
Yield	5 41 %

Fixed Income Summary CONTINUED

SUMMARY BY MATURITY

Fixed Income	Market Value	% of Bond Portfolio
Less than 5 years[1]	256,415 92	100%

SUMMARY BY TYPE

Fixed Income	Market Value	% of Bond Portfolio
Mutual Funds	256,415 92	100%

[1]The years indicate the number of years until the bond is scheduled to mature based on the statement end date Some bonds may be called, or paid in full, before their stated maturity

Fixed Income Detail

	Quantity	Price	Market Value	Tax Cost Adjusted / Original	Unrealized Gain/Loss	Estimated Annual Income / Accrued Interest	Yield
US Fixed Income - Taxable							
ISHARES BARCLAYS TIPS BOND FUND 464287-17-6	127 000	103 90	13,195 30	13,497 56	(302 26)	513 33	3 89%
GOLDMAN SACHS TRUST HIGH YIELD FUND INSTITUTIONAL SHS 38141W-67-9	8,307 655	6 95	57,738 20	47,485 95	10,252 25	4,535 97	7 86%
JPMORGAN STRATEGIC INCOME OPPORTUNITIES FUND 3844 30-Day Annualized Yield 2 76% 4812A4-35-1	1,054 241	11 59	12,218 65	10,712 77	1,505 88	437 51 37 95	3 58%
JPMORGAN CORE PLUS BOND FUND SELECT CLASS FUND 3122 30-Day Annualized Yield 5 17% 4812C0-84-5	19,219 919	7 75	148,954 37	149,499 25	(544 88)	7,687 96 711 14	5 16%
JPMORGAN SHORT DURATION BOND FUND SELECT CLASS FUND 3133 30-Day Annualized Yield 2 04% 4812C1-33-0	2,240 498	10 85	24,309 40	23,867 14	442 26	705 75 51 53	2 90%
Total US Fixed Income - Taxable			**$256,415 92**	**$245,062.67**	**$11,353.25**	**$13,880.52** **$800.62**	**5.41%**

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Form **8868** (Rev. April 2009) Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ File a separate application for each return.

OMB No 1545-1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box ▶ [X]
- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Part I **Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ▶ [ ]

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Electronic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868 For more details on the electronic filing of this form, visit *www.irs.gov/efile* and click on *e-file for Charities & Nonprofits*

Type or print	Name of Exempt Organization	Employer identification number
	B. F. WIRT MUSEUM FUND AGENCY 6853007400 / V15945005	34-6517991
File by the due date for filing your return See instructions	Number, street, and room or suite no. If a P.O. box, see instructions. C/O JPMORGAN CHASE BANK,NA;P.O.BOX 3038	
	City, town or post office, state, and ZIP code For a foreign address, see instructions. MILWAUKEE, WI 53201	

Check type of return to be filed(file a separate application for each return):

[ ] Form 990	[ ] Form 990-T (corporation)	[ ] Form 4720
[ ] Form 990-BL	[ ] Form 990-T (sec. 401(a) or 408(a) trust)	[ ] Form 5227
[ ] Form 990-EZ	[ ] Form 990-T (trust other than above)	[ ] Form 6069
[X] Form 990-PF	[ ] Form 1041-A	[ ] Form 8870

- The books are in the care of ▶ JPMORGAN CHASE BANK, N.A. 2200 ROSS AVENUE - DALLAS, TX 75201-2787

  Telephone No. ▶ 214-965-2903 FAX No. ▶
- If the organization does not have an office or place of business in the United States, check this box ▶ [ ]
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______. If this is for the whole group, check this box ▶ [ ]. If it is for part of the group, check this box ▶ [ ] and attach a list with the names and EINs of all members the extension will cover.

1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2010, to file the exempt organization return for the organization named above. The extension is for the organization's return for.

▶ [X] calendar year 2009 or

▶ [ ] tax year beginning ______, and ending ______.

2 If this tax year is for less than 12 months, check reason: [ ] Initial return [ ] Final return [ ] Change in accounting period

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	$ 162.
b	If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit	3b	$ 200.
c	**Balance Due.** Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	$ 0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.