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Form **990-PF**

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

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning , 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 L. R. MOFFITT & L. W. MOFFITT FOUNDATION 06191-00		A Employer identification number 34-6597380
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number (see page 10 of the instructions) (330) 384-7301
	FIRSTMERIT BANK 106 S. MAIN ST., 16TH FL		C If exemption application is pending, check here ☐
	City or town, state, and ZIP code AKRON, OH 44308		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 ☒ 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) ▶ \$ 1,463,915. Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			
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 ☐			

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				
	4 Dividends and interest from securities	45,666.	45,666.		STMT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	50,824.			
	b Gross sales price for all assets on line 6a	426,060.			
	7 Capital gain net income (from Part IV, line 2)		50,824.		
	8 Net short-term capital gain				
	9 Income modifications				
	10 a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	96,490.	96,490.		
	13 Compensation of officers, directors, trustees, etc.	16,890.	15,708.		1,182.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	1,118.	1,040.	NONE	78.
	c Other professional fees (attach schedule)				
	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				
	22 Printing and publications				
	23 Other expenses (attach schedule)	254.			254.
	24 Total operating and administrative expenses. Add lines 13 through 23	18,262.	16,748.	NONE	1,514.
	25 Contributions, gifts, grants paid	80,500.			80,500.
	26 Total expenses and disbursements. Add lines 24 and 25	98,762.	16,748.	NONE	82,014.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-2,272.			
	b Net investment income (if negative, enter -0-)		79,742.		
	c Adjusted net income (if negative, enter -0-)				

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

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Part II Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	136,455.	91,809.	91,809.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10 a Investments - U.S. and state government obligations (attach schedule)	489,483.	426,644.	449,555.
	b Investments - corporate stock (attach schedule)	423,517.	528,730.	869,999.
	c Investments - corporate bonds (attach schedule)	51,120.	51,120.	52,552.
	11 Investments - land, buildings, and equipment, basis			
Less: accumulated depreciation (attach schedule) ▶				
12 Investments - mortgage loans				
13 Investments - other (attach schedule)				
14 Land, buildings, and equipment, basis				
Less: accumulated depreciation (attach schedule) ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	1,100,575.	1,098,303.	1,463,915.	
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	1,100,575.	1,098,303.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see page 17 of the instructions)	1,100,575.	1,098,303.	
	31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	1,100,575.	1,098,303.	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,100,575.
2 Enter amount from Part I, line 27a	2	-2,272.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	1,098,303.
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	1,098,303.

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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) Gains (Col. (h) gain minus col. (k), but not less than -0- or Losses (from col. (h)))		
(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			
a					
b					
c					
d					
e					
2 Capital gain net income or (net capital loss)			2	50,824.	
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	87,586.	1,628,055.	0.05379793680
2007	88,004.	1,818,962.	0.04838143952
2006	84,927.	1,746,916.	0.04861538849
2005	83,051.	1,711,199.	0.04853380583
2004	69,589.	1,710,998.	0.04067158465
2 Total of line 1, column (d)			2 0.24000015529
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 0.04800003106
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 1,387,026.
5 Multiply line 4 by line 3			5 66,577.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 797.
7 Add lines 5 and 6			7 67,374.
8 Enter qualifying distributions from Part XII, line 4			8 82,014.

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		1	797.	
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 ☒ and enter 1% of Part I, line 27b				
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		2	797.	
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)				
3 Add lines 1 and 2				
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	797.	
6 Credits/Payments		7	673.	
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a			673.
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	673.	
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	124.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10		
11 Enter the amount of line 10 to be Credited to 2010 estimated tax ☒ NONE 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?		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)?		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?		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?		X
If "Yes," attach a detailed description of the activities		
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		X
If "Yes," attach the statement required by General Instruction T		
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see 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	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		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		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 ☐ FIRSTMERIT BANK, NA Telephone no ☐ (330) 384-7301			
Located at ☐ 106 S. MAIN ST., 16TH FL, AKRON, OH ZIP + 4 ☐ 44308				
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		
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

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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)? ☐ Yes ☒ No
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? ☐ Yes ☒ 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? ☐ Yes ☒ No

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 8		16,890.	-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**

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services** (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		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 N/A - NO SIGNIFICANT INVOLVEMENT IN GRANT PROGRAMS	
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	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	1,223,047.
b	Average of monthly cash balances	1b	185,101.
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	1,408,148.
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	1,408,148.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	21,122.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,387,026.
6	Minimum investment return. Enter 5% of line 5	6	69,351.

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	69,351.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	797.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	797.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	68,554.
4	Recoveries of amounts treated as qualifying distributions	4	NONE
5	Add lines 3 and 4	5	68,554.
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	68,554.

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	82,014.
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	82,014.
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	797.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	81,217.

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				68,554.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			78,115.	
b Total for prior years 20 07, 20 , 20		NONE		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	NONE			
b From 2005	NONE			
c From 2006	NONE			
d From 2007	NONE			
e From 2008	NONE			
f Total of lines 3a through e	NONE			
4 Qualifying distributions for 2009 from Part XII, line 4 ► \$ 82,014.				
a Applied to 2008, but not more than line 2a			78,115.	
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				3,899.
e Remaining amount distributed out of corpus	NONE			
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	NONE			
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				
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010.				64,655.
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)	NONE			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	NONE			
10 Analysis of line 9.				
a Excess from 2005	NONE			
b Excess from 2006	NONE			
c Excess from 2007	NONE			
d Excess from 2008	NONE			
e Excess from 2009	NONE			

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			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
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 9

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 10				
Total			3a	80,500.
b Approved for future payment				
Total			3b	

Part XVI-A	Analysis of Income-Producing Activities
-------------------	--

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount		
1 Program service revenue						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities			14	45,666.		
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	50,824.		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory . .						
11 Other revenue a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal Add columns (b), (d), and (e)				96,490.		
13 Total. Add line 12, columns (b), (d), and (e)					13	96,490.

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

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

[illegible]

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 LONG-TERM CAPITAL GAIN DIVIDENDS					316.	
		1700. CATERPILLAR INC					12/27/1977	07/28/2009
		PROPERTY TYPE: SECURITIES						
73,438.00		11,729.00					61,709.00	
		800. DOMINION RESOURCES INC VA					03/07/2005	07/28/2009
		PROPERTY TYPE: SECURITIES						
27,385.00		30,127.00					-2,742.00	
		50000. FNMA 5.250% 1/15					08/27/2002	01/15/2009
		PROPERTY TYPE: SECURITIES						
50,000.00		53,033.00					-3,033.00	
		585. MEDTRONIC INC					05/09/2001	07/28/2009
		PROPERTY TYPE: SECURITIES						
20,376.00		25,746.00					-5,370.00	
		50300. FEDERATED PRIME OBLIGATIONS FD					07/09/2009	07/29/2009
		PROPERTY TYPE: SECURITIES						
50,300.00		50,300.00						
		51496.31 FEDERATED PRIME OBLIGATIONS FD					07/09/2009	07/31/2009
		PROPERTY TYPE: SECURITIES						
51,496.00		51,496.00						
		1445.56 FEDERATED PRIME OBLIGATIONS FD					07/09/2009	08/03/2009
		PROPERTY TYPE: SECURITIES						
1,446.00		1,446.00						
		1459.14 FEDERATED PRIME OBLIGATIONS FD					07/09/2009	09/01/2009
		PROPERTY TYPE: SECURITIES						
1,459.00		1,459.00						
		3.17 FEDERATED PRIME OBLIGATIONS FD					07/09/2009	09/23/2009
		PROPERTY TYPE: SECURITIES						
3.00		3.00						
		1331.78 FEDERATED PRIME OBLIGATIONS FD					07/09/2009	10/01/2009
		PROPERTY TYPE: SECURITIES						
1,332.00		1,332.00						

**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)	
1,248.00		1248.18 FEDERATED PRIME OBLIGATIONS FD PROPERTY TYPE: SECURITIES 1,248.00					07/09/2009	11/02/2009
1,261.00		1261.49 FEDERATED PRIME OBLIGATIONS FD PROPERTY TYPE: SECURITIES 1,261.00					07/09/2009	12/01/2009
55,000.00		55000. FEDERATED PRIME OBLIGATIONS FD PROPERTY TYPE: SECURITIES 55,000.00					07/09/2009	12/28/2009
31,000.00		31000. FEDERATED PRIME OBLIGATIONS FD PROPERTY TYPE: SECURITIES 31,000.00					07/09/2009	12/29/2009
60,000.00		60000. U.S. TREASURY BONDS 3.875% 5/15 PROPERTY TYPE: SECURITIES 60,056.00					03/07/2005	05/15/2009
							-56.00	
TOTAL GAIN(LOSS)							----- 50,824. =====	

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

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
INTEREST & DIVIDENDS	45,666.	45,666.
TOTAL	45,666.	45,666.

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	1,118.	1,040.		78.
TOTALS	1,118.	1,040.	NONE	78.
	=====	=====	=====	=====

L. R. MOFFITT & L. W. MOFFITT FOUNDATION

FORM 990PF, PART I - OTHER EXPENSES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	CHARITABLE PURPOSES -----
DUES & SUBSCRIPTIONS	54.	54.
OHIO FILING FEE	200.	200.
	-----	-----
TOTALS	254.	254.
	=====	=====

L. R. MOFFITT & L. W. MOFFITT FOUNDATION
FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS
=====

34-6597380

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV -----
SEE ATTACHED FIRSTMERIT STMT	426,644.	449,555.
TOTALS	426,644.	449,555.
	=====	=====

L. R. MOFFITT & L. W. MOFFITT FOUNDATION
 FORM 990PF, PART II - CORPORATE STOCK
 =====

34-6597380

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV -----
SEE ATTACHED FIRSTMERIT STMT	528,730.	869,999.
	-----	-----
TOTALS	528,730.	869,999.
	=====	=====

L. R. MOFFITT & L. W. MOFFITT FOUNDATION
 FORM 990PF, PART II - CORPORATE BONDS
 =====

34-6597380

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV ---
SEE ATTACHED FIRSTMERIT STMT	51,120. -----	52,552. -----
TOTALS	51,120. =====	52,552. =====

STATE(S) WHERE THE FOUNDATION IS REGISTERED
=====

OH

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

=====

OFFICER NAME:

FIRSTMERIT BANK, NA

ADDRESS:

106 S. MAIN ST, 16th FL.

AKRON, OH 44308

TITLE:

CO-TRUSTEE

COMPENSATION 11,248.

OFFICER NAME:

ALLAN JOHNSON, ESQ.

ADDRESS:

955 MAYFAIR ROAD

AKRON, OH 44303

TITLE:

CO-TRUSTEE

COMPENSATION 2,821.

OFFICER NAME:

ORVILLE L. REED III, ESQ.

ADDRESS:

3800 EMBASSY PARKWAY, SUITE 300

AKRON, OH 44333

TITLE:

CO TRUSTEE

COMPENSATION 2,821.

TOTAL COMPENSATION:

16,890.

=====

=====

RECIPIENT NAME:

BRENDA MOUBRAY, TRUST OFFICER

ADDRESS:

FIRSTMERIT BANK, NA, 106 S. MAIN ST., 16th FLOOR
AKRON, OH 44308

RECIPIENT'S PHONE NUMBER: 330-384-7301

FORM, INFORMATION AND MATERIALS:

NO SPECIFIC FORMAT; REQUESTS MUST BE MADE IN WRITING

SUBMISSION DEADLINES:

NONE

RESTRICTIONS OR LIMITATIONS ON AWARDS:

LOCAL AKRON AND SUMMIT COUNTY AREA

L. R. MOFFITT & L. W. MOFFITT FOUNDATION
FORM 990PF, PART XV, LINE 3 - CONTRIBUTIONS, GIFTS, GRANTS PAID
=====

34-6597380

RECIPIENT NAME:

SEE ATTACHED STATEMENT 10

AMOUNT OF GRANT PAID 80,500.

TOTAL GRANTS PAID:

80,500.

=====

STATEMENT 10



As individual as you are™

MOFFITT FOUNDATION - CO-TRUSTEEU/W
ACCOUNT: 06191-00

L.R. MOFFITT & L.W. MOFFITT FOUNDATION 06191-00
EIN: 34-6597380
2009 FORM 990-PF
BALANCE SHEET ATTACHMENT

ASSET SUMMARY

PAGE: 3

AS OF 12/31/09

ASSET CATEGORY	MARKET VALUE	PERCENT OF ACCOUNT	FEDERAL TAX COST	UNREALIZED GAIN/LOSS (COST VS MKT)	ESTIMATED ANNUAL INCOME	INCOME YIELD AT MARKET
PRINCIPAL PORTFOLIO						
PRINCIPAL CASH	31,179.45-	2.13-%	31,179.45-			
MONEY MARKET FUNDS	91,808.95	6.27 %	91,808.95	0.00	9	0.01 %
U.S. TREASURY OBLIGATIONS	134,562.50	9.19 %	123,164.06	11,398.44	5,438	4.04 %
U.S. GOVERNMENT AGENCIES	314,992.90	21.52 %	303,480.00	11,512.90	13,650	4.33 %
CORPORATE & FOREIGN BONDS	52,552.00	3.59 %	51,120.00	1,432.00	3,000	5.71 %
COMMON EQUITY SECURITIES	869,999.37	59.43 %	528,730.14	341,269.23	22,334	2.57 %
PRINCIPAL PORTFOLIO TOTAL	1,432,736.27	97.87 %	1,067,123.70	365,612.57	44,431	3.04 %
INCOME PORTFOLIO						
INCOME CASH	31,179.45	2.13 %	31,179.45			
TOTAL ASSETS	1,463,915.72	100.00 %	1,098,303.15	365,612.57	44,431	3.04 %





L.R. MOFFITT & L.W. MOFFITT FOUNDATION 06191-00
EIN: 34-6597380
2009 FORM 990-PF
BALANCE SHEET ATTACHMENT

MOFFITT FOUNDATION - CO-TRUSTEEU/W
ACCOUNT: 06191-00

LIST OF ASSETS

AS OF 12/31/09

PAGE: 4

PAR VALUE OR SHARES	ASSET DESCRIPTION	MARKET VALUE UNIT PRICE	% OF ACCOUNT	FED TAX COST	UNREALIZED GAIN/LOSS (COST VS MKT)	ESTIMATED ANNUAL INCOME	INCOME YIELD AT MARKET
PRINCIPAL PORTFOLIO							
PRINCIPAL CASH							
MONEY MARKET FUNDS							
91,808.95	FEDERATED PRIME OBLIGATIONS FUND	91,808.95 1.000	6.27 %	91,808.95	0.00	9	0.01 %
U.S. TREASURY OBLIGATIONS							
100,000	UNITED STATES TREASURY NOTES DTD 08/15/2002 4.375% 08/15/2012	107,586.00 107.586	7.35 %	98,875.00	8,711.00	4,375	4.07 %
25,000	UNITED STATES TREASURY NOTES DTD 08/15/2003 4.250% 08/15/2013	26,976.50 107.906	1.84 %	24,289.06	2,687.44	1,063	3.94 %
TOTAL U.S. TREASURY OBLIGATIONS							
		134,562.50	9.19 %	123,164.06	11,398.44	5,438	4.04 %
U.S. GOVERNMENT AGENCIES							
50,000	FEDERAL NATIONAL MORTGAGE ASSN DTD 11/23/2005 4.750% 12/15/2010	51,969.00 103.938	3.55 %	50,000.00	1,969.00	2,375	4.57 %
60,000	FEDERAL HOME LOAN BANK DTD 11/01/2006 4.875% 11/18/2011 NON CALLABLE	64,087.80 106.813	4.38 %	60,000.00	4,087.80	2,925	4.56 %
40,000	FEDERAL NATIONAL MORTGAGE ASSN DTD 09/17/2004 4.625% 10/15/2014	43,337.60 108.344	2.96 %	39,840.00	3,497.60	1,850	4.27 %





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LIST OF ASSETS

MOFFITT FOUNDATION - CO-TRUSTEEU/W
 ACCOUNT: 06191-00

PAGE: 5

AS OF 12/31/09

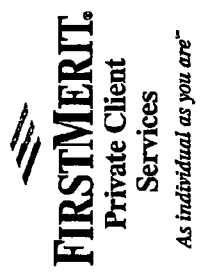
PAR VALUE OR SHARES	ASSET DESCRIPTION	MARKET VALUE UNIT PRICE	% OF ACCOUNT	FED TAX COST	UNREALIZED GAIN/LOSS (COST VS MKT)	ESTIMATED ANNUAL INCOME	INCOME YIELD AT MARKET
50,000	FEDERAL HOME LOAN MORTGAGE CORP DTD 07/14/2005 4.375% 07/17/2015	53,265.50 106.531	3.64 %	51,750.00	1,515.50	2,188	4.11 %
50,000	FEDERAL HOME LOAN MORTGAGE CORP MEDIUM TERM NOTE DTD 07/20/2009 4.000% 07/20/2016 CALLABLE	49,880.00 99.760	3.41 %	50,250.00	370.00-	2,000	4.01 %
50,000	FEDERAL HOME LOAN BANK DTD 02/29/2008 4.625% 03/09/2018 NON CALLABLE	52,453.00 104.906	3.58 %	51,640.00	813.00	2,313	4.41 %
TOTAL U.S. GOVERNMENT AGENCIES							
CORPORATE & FOREIGN BONDS							
50,000	ALCOA INC DTD 12/06/2001 6.000% 01/15/2012	52,552.00 105.104	3.59 %	51,120.00	1,432.00	3,000	5.71 %
COMMON EQUITY SECURITIES							
475	ABBOTT LABS	25,645.25 53.990	1.75 %	21,664.04	3,981.21	760	2.96 %
800	BANK AMERICA CORP	12,048.00 15.060	0.82 %	23,719.00	11,671.00-	32	0.27 %
1,700	CISCO SYSTEMS INC	40,698.00 23.940	2.78 %	46,856.25	6,158.25-	0	0.00 %



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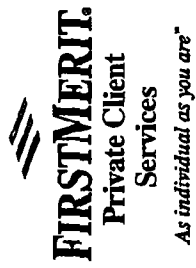


MOFFITT FOUNDATION - CO-TRUSTEEU/W
 ACCOUNT: 06191-00

LIST OF ASSETS
 AS OF 12/31/09

PAR VALUE OR SHARES	ASSET DESCRIPTION	MARKET VALUE UNIT PRICE	% OF ACCOUNT	FED TAX COST	UNREALIZED GAIN/LOSS (COST VS MKT)	ESTIMATED ANNUAL INCOME	INCOME YIELD AT MARKET
300	COCA COLA CO	17,100.00 57.000	1.17 %	18,417.00	1,317.00-	492	2.88 %
200	DISNEY WALT CO NEW	6,450.00 32.250	0.44 %	7,102.14	652.14-	70	1.09 %
1,000	DU PONT E I DE NEMOURS & CO	33,670.00 33.670	2.30 %	9,465.34	24,204.66	1,640	4.87 %
1,500	DUKE ENERGY HOLDING CORP	25,815.00 17.210	1.76 %	23,097.34	2,717.66	1,440	5.58 %
600	EMERSON ELEC CO	25,560.00 42.600	1.75 %	20,337.00	5,223.00	804	3.15 %
500	EXXON MOBIL CORPORATION	34,095.00 68.190	2.33 %	31,670.00	2,425.00	840	2.46 %
2,300	GENERAL ELECTRIC CORP	34,799.00 15.130	2.38 %	2,392.08	32,406.92	920	2.64 %
380	GENERAL MLS INC	26,907.80 70.810	1.84 %	22,361.06	4,546.74	745	2.77 %
200	HOME DEPOT INC	5,786.00 28.930	0.40 %	10,997.00	5,211.00-	180	3.11 %
800	INTERNATIONAL BUSINESS MACHINES CORP	104,720.00 130.900	7.15 %	12,951.50	91,768.50	1,760	1.68 %





MOFFITT FOUNDATION - CO-TRUSTEEU/W
 ACCOUNT: 06191-00

LIST OF ASSETS

AS OF 12/31/09

PAGE: 7

PAR VALUE OR SHARES	ASSET DESCRIPTION	MARKET VALUE UNIT PRICE	% OF ACCOUNT	FED TAX COST	UNREALIZED GAIN/LOSS (COST VS MKT)	ESTIMATED ANNUAL INCOME	INCOME YIELD AT MARKET
1,000	JOHNSON & JOHNSON	64,410.00 64.410	4.40 %	10,000.00	54,410.00	1,960	3.04 %
550	JP MORGAN CHASE & CO	22,918.50 41.670	1.57 %	20,970.90	1,947.60	110	0.48 %
1,200	LILLY ELI & CO	42,852.00 35.710	2.93 %	22,687.50	20,164.50	2,352	5.49 %
350	MCDONALDS CORP	21,854.00 62.440	1.49 %	19,655.27	2,198.73	770	3.52 %
684	MICROSOFT CORP	20,848.32 30.480	1.42 %	30,416.63	9,568.31-	356	1.71 %
500	PEPSICO INC	30,400.00 60.800	2.08 %	27,180.00	3,220.00	900	2.96 %
1,500	PFIZER INC	27,285.00 18.190	1.86 %	4,106.14	23,178.86	1,080	3.96 %
300	PRAXAIR INC	24,093.00 80.310	1.65 %	22,915.20	1,177.80	480	1.99 %
650	PROCTER & GAMBLE CO	39,409.50 60.630	2.69 %	22,905.83	16,503.67	1,144	2.90 %
500	RAYTHEON COMPANY	25,760.00 51.520	1.76 %	19,580.00	6,180.00	620	2.41 %





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MOFFITT FOUNDATION - CO-TRUSTEEU/W
ACCOUNT: 06191-00

L.R. MOFFITT & L.W. MOFFITT FOUNDATION 06191-00
EIN: 34-6597380
2009 FORM 990-PF
BALANCE SHEET ATTACHMENT

LIST OF ASSETS

PAGE: 8

AS OF 12/31/09

PAR VALUE OR SHARES	ASSET DESCRIPTION	MARKET VALUE UNIT PRICE	% OF ACCOUNT	FED TAX COST	UNREALIZED GAIN/LOSS (COST VS MKT)	ESTIMATED ANNUAL INCOME	INCOME YIELD AT MARKET
1,300	SCHLUMBERGER LTD	84,617.00 65.090	5.78 %	13,874.95	70,742.05	1,092	1.29 %
900	SYSCO CORP	25,146.00 27.940	1.72 %	21,127.00	4,019.00	900	3.58 %
400	TARGET CORP	19,348.00 48.370	1.32 %	21,256.97	1,908.97-	272	1.41 %
400	UNITED TECHNOLOGIES CORP	27,764.00 69.410	1.90 %	21,024.00	6,740.00	616	2.22 %
TOTAL COMMON EQUITY SECURITIES		869,999.37	59.43 %	528,730.14	341,269.23	22,334	2.57 %
PRINCIPAL PORTFOLIO TOTAL		1,432,736.27	97.87 %	1,067,123.70	365,612.57	44,431	3.10 %



LIST OF ASSETS

PAGE: 9

AS OF 12/31/09

MOFFITT FOUNDATION - CO-TRUSTEEU/W
 ACCOUNT: 06191-00

PAR VALUE OR SHARES	ASSET DESCRIPTION	MARKET VALUE UNIT PRICE	% OF ACCOUNT	FED TAX COST	UNREALIZED GAIN/LOSS (COST VS MKT)	ESTIMATED ANNUAL INCOME	INCOME YIELD AT MARKET
INCOME PORTFOLIO							
	INCOME CASH	31,179.45	2.13 %	31,179.45			
TOTAL ASSETS		1,463,915.72	100.00 %	1,098,303.15	365,612.57	44,431	3.04 %



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L. R. Moffitt & L. W. Moffitt Foundation Co-Trust #06191-00

FEIN: 34-6597380

Contributions Paid During 2009

Recipient Name and Address	Relationship to Foundation	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
Chamber Music Society of Ohio Akron, OH	None	501 c (3)	General Support	500
Act II Productions - The Illusion Factory Akron, OH	None	501 c (3)	Educational	500
Akron Art Museum Akron, OH	None	501 c (3)	Operational Support	3,500
Akron Roundtable Akron, OH	None	501 c (3)	General Support	250
Central Summit County Choral Society Akron, OH	None	501 c (3)	Operational Support	500
Community Hall foundation Program Endowment Akron, OH	None	501 c (3)	General Support	500
Conrad Botzum Farmstead Peninsula, OH	None	501 c (3)	Civic Activities	500
Children's Concert Society of Akron Akron, OH	None	501 c (3)	Program Support	500
Downtown Akron Partnership - Firstnight Akron Akron, OH	None	501 c (3)	Program Support	1,000
Kent State University Foundation - Porthouse Theater Kent, OH	None	501 c (3)	Operational Support	500
Magical Theatre Company Barberton, OH	None	501 c (3)	Program Support	500
Musical Arts Association - Blossom Music Center Cleveland, OH	None	501 c (3)	Operational Support	4,000
Greater Akron Musical Association - Akron Symphony Akron, OH	None	501 c (3)	Educational	1,000
Central Catholic High School Canton, OH	None	501 c (3)	Educational	500
Chapel Hill Christian School Cuyahoga Falls, OH	None	501 c (3)	Educational	1,000
JA Worldwide - Junior Achievement North Central Ohio	None	501 c (3)	Educational	1,000
National Inventors Hall of Fame Akron, OH	None	501 c (3)	Educational	1,000
Summit County Historical Society	None	501 c (3)	Educational	4,000

L. R. Moffitt & L. W. Moffitt Foundation Co-Trust #06191-00

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Contributions Paid During 2009

Recipient Name and Address	Relationship to Foundation	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
Akron, OH				
Stan Hywet Hall & Gardens Akron, OH	None	501 c (3)	Operational Support	1,000
Tuesday Musical Association Akron, OH	None	501 c (3)	Operational Support	500
Weathervane Community Playhouse Akron, OH	None	501 c (3)	Educational Support	500
Western Reserve Historical Society - Hale Farm Akron, OH	None	501 c (3)	Educational Support	1,000
Project Learn of Summit County Akron, OH	None	501 c (3)	Educational Support	1,000
Ohio Foundation of Independent Colleges Columbus, OH	None	501 c (3)	Educational Support	2,000
Walsh Jesuit High School Cuyahoga Falls, OH	None	501 c (3)	Educational Support	1,500
Cuyahoga Valley National Park Association Peninsula, OH	None	501 c (3)	Operational Support	1,000
Let's Grow Akron Akron, OH	None	501 c (3)	Operational Support	1,000
Beacon Journal Charity Fund Akron, OH	None	501 c (3)	Educational	2,500
St. Vincent-St. Mary High School Akron, OH	None	501 c (3)	Educational Support	1,500
Spring Garden School Copley, OH	None	501 c (3)	Operational Support	500
Summit Education Initiative Akron, OH	None	501 c (3)	Operational Support	500
Twinsburg City School District Twinsburg, OH	None	501 c (3)	Educational	500
Akron Zoological Park Akron, OH	None	501 c (3)	Operational Support	1,000
Keep Akron Beautiful Akron, OH	None	501 c (3)	Program Support	1,000
Western Reserve Land Conservancy Chesterland, OH	None	501 c (3)	Program Support	500

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Children's Hospital Foundation Akron, OH	None	501 c (3)	Program Support	1,000
Community Drug Board - Community Health Center Akron, OH	None	501 c (3)	Operational Support	750
Mental Health America of Summit County Akron, OH	None	501 c (3)	Program Support	500
Stewart's Caring Place Akron, OH	None	501 c (3)	Operational Support	500
Summa Foundation Akron, OH	None	501 c (3)	Program Support	500
Access Inc. Akron, OH	None	501 c (3)	Operational Support	1,000
Akron-Canton Regional Foodbank Akron, OH	None	501 c (3)	Operational Support	4,000
Akron Community Foundation Akron, OH	None	501 c (3)	Operational Support	1,000
Akron Marathon Charitable Corporation Akron, OH	None	501 c (3)	Operational Support	500
American Red Cross - Summit County Akron, OH	None	501 c (3)	Program Support	1,000
Boys & Girls Clubs of Western Reserve Akron, OH	None	501 c (3)	Operational Support	1,000
CYO and Community Services Akron, OH	None	501 c (3)	Program Support	500
East Akron Neighborhood Development Corp. Akron, OH	None	501 c (3)	Program Support	1,000
Boy Scouts of America - Great Trail Council Akron, OH	None	501 c (3)	Operational Support	1,000
Battered Women's Shelter Akron, OH	None	501 c (3)	Operational Support	2,000
Family Financial Transformation of Ohio Tallmadge, OH	None	501 c (3)	Educational	500
Girl Scouts of North East Ohio Akron, OH	None	501 c (3)	Operational Support	1,000
Goodwill Industries of Akron	None	501 c (3)	Program Support	2,500

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Akron, OH				
Greenleaf Family Center Akron, OH	None	501 c (3)	Operational Support	500
Habitat for Humanity of Summit County Akron, OH	None	501 c (3)	Operational Support	1,000
Good Neighbors Inc. Akron, OH	None	501 c (3)	Operational Support	1,000
Inner City Soccer Team Akron, OH	None	501 c (3)	Operational Support	500
International Soap Box Derby Inc. Akron, OH	None	501 c (3)	Operational Support	1,000
Loyala of the Lakes Akron, OH	None	501 c (3)	Program Support	500
Mobile Meals Inc. Akron, OH	None	501 c (3)	Operational Support	2,500
Haven of Rest Ministries Akron, OH	None	501 c (3)	Operational Support	1,000
Pegasus Farm Hartville	None	501 c (3)	Operational Support	500
Rebuilding Together Summit County Akron, OH	None	501 c (3)	Operational Support	500
St. Vincent DePaul Society Akron, OH	None	501 c (3)	Educational	1,000
United Way of Summit County Akron, OH	None	501 c (3)	Operational Support	1,000
Opportunity Parish Ecumenical Neighborhood Ministry Akron, OH	None	501 c (3)	Operational Support	1,000
Leadership Akron Akron, OH	None	501 c (3)	Operational Support	1,000
First Presbyterian Church Akron, OH	None	501 c (3)	Operational Support	6,000
Waiting Child Fund Cleveland, OH	None	501 c (3)	Operational Support	500
Urban Vision Akron, OH	None	501 c (3)	Operational Support	500

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Stan Hywet Hall & Gardens Akron, OH	None	501 c (3)	Operational Support	1,000
Cuyahoga Valley Youth Ballet Cuyahoga Falls, OH	None	501 c (3)	Operational Support	500
Total.....				80,500