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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

, 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

THE HELEN & LOUIS STOLIER  
FAMILY FOUNDATIONNumber and street (or P O box number if mail is not delivered to street address)  
20102 CHAGRIN BLVD.

A Employer identification number

34-6991709

B Telephone number (see page 10 of the instructions)

216-991-6892

C If exemption application is pending, check here ► D 1. Foreign organizations, check here ► 2. Foreign organizations meeting the  
85% test, check here and attach computation ► E If private foundation status was terminated under  
section 507(b)(1)(A), check here ► F If the foundation is in a 60-month termination  
under section 507(b)(1)(B), check here ► H Check type of organization:  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

J Accounting method.

 Cash Accrualof year (from Part II, col (c),  
line 16) ► \$ 2,497,975 (Part I, column (d) must be on cash basis)**Part I Analysis of Revenue and Expenses**

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

(a) Revenue and  
expenses per  
books(b) Net investment  
income(c) Adjusted net  
income(d) Disbursements  
for charitable  
purposes  
(cash basis only)

Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)			
	2 Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B			
	3 Interest on savings and temporary cash investments	23,622	23,622	23,622
	4 Dividends and interest from securities	155,806	155,806	155,806
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	STMT 1 725,320 RECEIVED APR 15 2010 462 RS OSC OGDEN UT		
	b Gross sales price for all assets on line 6a			
	7 Capital gain net income (from Part IV, line 2)		0	
	8 Net short-term capital gain			0
	9 Income modifications			
Operating and Administrative Expenses	10a Gross sales less returns & allowances			
	b Less. Cost of goods sold			
	c Gross profit or (loss) (attach schedule)			
	11 Other income (attach schedule)	STMT 2 7,893		7,893
	12 Total. Add lines 1 through 11	-149,999	179,428	187,321
	13 Compensation of officers, directors, trustees, etc.	20,442	1,500	18,942
	14 Other employee salaries and wages			
	15 Pension plans, employee benefits			
	16a Legal fees (attach schedule)			
	b Accounting fees (attach schedule)	STMT 3 4,416	4,416	
	c Other professional fees (attach schedule)	STMT 4 17,590	8,921	8,669
	17 Interest			
	18 Taxes (attach schedule) (see page 14 of the instructions)	STMT 5 1,638	1,438	200
Operating and Administrative Expenses	19 Depreciation (attach schedule) and depletion	STMT 6 113		
	20 Occupancy	1,700	850	850
	21 Travel, conferences, and meetings	364		364
	22 Printing and publications			
	23 Other expenses (att. sch.)	STMT 7 1,012	220	775
	24 Total operating and administrative expenses.	47,275	17,345	29,800
	Add lines 13 through 23	97,250		97,250
	25 Contributions, gifts, grants paid	144,525	17,345	0
	26 Total expenses and disbursements. Add lines 24 and 25			127,050
	27 Subtract line 26 from line 12:	-294,524		
	a Excess of revenue over expenses and disbursements			
	b Net investment income (if negative, enter -0-)		162,083	
	c Adjusted net income (if negative, enter -0-)			187,321

Assets	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
1	Cash—non-interest-bearing				
2	Savings and temporary cash investments		85,227	128,599	128,599
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 (att. schedule) ►				
	Less allowance for doubtful accounts ►				
8	Inventories for sale or use				
9	Prepaid expenses and deferred charges		3,000	1,562	1,562
10a	Investments—U.S. and state government obligations (attach schedule)	SEE STMT 8			
b	Investments—corporate stock (attach schedule)		2,779,525	2,408,692	2,337,368
c	Investments—corporate bonds (attach schedule)				
11	Investments—land, buildings, and equipment basis ►				
	Less accumulated depreciation (attach sch) ►				
12	Investments—mortgage loans				
13	Investments—other (attach schedule)				
14	Land, buildings, and equipment basis ►	6,302			
	Less accumulated depreciation (attach sch) ►	STMT 9	6,131	284	171
15	Other assets (describe ►	SEE STATEMENT 10 )			
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)			30,446	30,446
				2,868,036	2,569,470
					2,497,975
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 ►	SEE STATEMENT 11 )			
23	Total liabilities (add lines 17 through 22)			737	737
				0	737
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ► <input type="checkbox"/>				
	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 ► <input checked="" type="checkbox"/>				
	and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds		2,868,036	2,568,733
	30	Total net assets or fund balances (see page 17 of the instructions)		2,868,036	2,568,733
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)		2,868,036	2,569,470

## 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	2,868,036
2	Enter amount from Part I, line 27a	2	-294,524
3	Other increases not included in line 2 (itemize) ► SEE STATEMENT 12	3	
4	Add lines 1, 2, and 3	4	2,573,512
5	Decreases not included in line 2 (itemize) ► SEE STATEMENT 13	5	4,779
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,568,733

**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	N/A			
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				(l) 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)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		2	
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	150,394	2,533,069	0.059372
2007	177,961	3,089,396	0.057604
2006	179,589	3,019,565	0.059475
2005	189,757	3,002,985	0.063189
2004	184,376	3,067,279	0.060111

2 Total of line 1, column (d)

2 0.299751

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 0.059950

4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5

4 2,086,403

5 Multiply line 4 by line 3

5 125,080

6 Enter 1% of net investment income (1% of Part I, line 27b)

6 1,621

7 Add lines 5 and 6

7 126,701

8 Enter qualifying distributions from Part XII, line 4

8 127,050

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/> and enter "N/A" on line 1 (attach copy of letter if necessary—see instructions)	1	1,621
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► <input type="checkbox"/> and enter 1% of Part I, line 27b	2	0
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)	3	1,621
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0
3	Add lines 1 and 2	5	1,621
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	6	Credits/Payments
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0-	6a	1,562
6	Credits/Payments	6b	
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6c	
b	Exempt foreign organizations—tax withheld at source	6d	
c	Tax paid with application for extension of time to file (Form 8868)	7	1,562
d	Backup withholding erroneously withheld	8	
7	Total credits and payments. Add lines 6a through 6d	9	59
8	Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	10	
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter amount owed	11	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	Refunded	
11	Enter the amount of line 10 to be <b>Credited to 2010 estimated tax ►</b>		

**Part VII-A Statements Regarding Activities**

		Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? 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 ► \$ _____ (2) On foundation managers ► \$ _____		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ _____		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2	X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	X
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5	X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	X
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ► 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 on page 27)? If "Yes," complete Part XIV	9	X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X

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

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? Website address ► WWW.GUIDESTAR.ORG	13	X
14	The books are in care of ► CARL J MONASTRA 20102 CHAGRIN BLVD Located at ► SHAKER HTS., OH	Telephone no ► 216-752-1121 ZIP+4 ► 44122	
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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	► □
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?	N/A	1c
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	If "Yes," list the years ► 20 , 20 , 20 , 20		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions.)	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. ► 20 , 20 , 20 , 20		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (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?		
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b

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

5a	During the year did the foundation pay or incur any amount to	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	N/A	5b
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? If "Yes," attach the statement required by Regulations section 53.4945-5(d).	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	N/A	
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		6b
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		X
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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 (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
RUTH STOLIER 3611 RAWNSDALE RD	SHAKER HTS OH 44122	TRUSTEE 5.00	6,814	0
LOUIS P CASTELLARIN 28899 EDGEDEALE RD	PEPPER PIKE OH 44124	TRUSTEE 10.00	6,814	0
CARL MONASTRA 2511 MILFORD RD	UNIVERSITY HTS. OH 44118	TRUSTEE 10.00	6,814	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				

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

►

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

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

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

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

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

Expenses

1 N/A

2

3

4

**Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)**

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

Amount

1 N/A

2

All other program-related investments. See page 24 of the instructions

3

Total. Add lines 1 through 3 ►

Form 990-PF (2009)

**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	2,041,689
b	Average of monthly cash balances	1b	76,312
c	Fair market value of all other assets (see page 24 of the instructions)	1c	175
d	<b>Total</b> (add lines 1a, b, and c)	1d	2,118,176
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	2,118,176
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	31,773
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,086,403
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	104,320

**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	104,320
2a	Tax on investment income for 2009 from Part VI, line 5	2a	1,621
b	Income tax for 2009 (This does not include the tax from Part VI )	2b	
c	Add lines 2a and 2b	2c	1,621
3	Distrinbutable amount before adjustments Subtract line 2c from line 1	3	102,699
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	102,699
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	<b>Distributable amount as adjusted</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	102,699

**Part XII Qualifying Distributions (see page 25 of the instructions)**

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes	1a	127,050
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1b	
b	Program-related investments—total from Part IX-B	2	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	3a	
3	Amounts set aside for specific charitable projects that satisfy the:	3b	
a	Suitability test (prior IRS approval required)	4	127,050
b	Cash distribution test (attach the required schedule)	5	1,621
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	6	125,429
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)		
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4		

**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 Distrnbutable amount for 2009 from Part XI, line 7				102,699
2 Undistrnbutable income, if any, as of the end of 2009:				
a Enter amount for 2008 only				
b Total for prior years 20 ____ , 20 ____ , 20 ____				
3 Excess distributions carryover, if any, to 2009				
a From 2004	33,304			
b From 2005	42,002			
c From 2006	31,209			
d From 2007	26,430			
e From 2008	26,617			
f Total of lines 3a through e	159,562			
4 Qualifying distributions for 2009 from Part XII, line 4. ► \$ 127,050				
a Applied to 2008, but not more than line 2a				
b Applied to undistrnbutable income of prior years (Election required—see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
d Applied to 2009 distrnbutable amount				102,699
e Remaining amount distributed out of corpus	24,351			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:	183,913			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistrnbutable income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistrnbutable income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions				
e Undistrnbutable income for 2008 Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions				
f Undistrnbutable income for 2009 Subtract lines 4d and 5 from line 1. This amount must be distrnbuted in 2010				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	33,304			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	150,609			
10 Analysis of line 9				
a Excess from 2005	42,002			
b Excess from 2006	31,209			
c Excess from 2007	26,430			
d Excess from 2008	26,617			
e Excess from 2009	24,351			



## Part XV Supplementary Information (continued)

## 3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year SEE STATEMENT 16				97,250
<b>Total</b>			► 3a	97,250
b Approved for future payment N/A				
<b>Total</b>			► 3b	

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

Enter gross amounts unless otherwise indicated.

	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See page 28 of the instructions )
<b>1 Program service revenue</b>					
a					
b					
c					
d					
e					
f					
<b>g Fees and contracts from government agencies</b>					
<b>2 Membership dues and assessments</b>					23,622
<b>3 Interest on savings and temporary cash investments</b>					
<b>4 Dividends and interest from securities</b>					155,806
<b>5 Net rental income or (loss) from real estate</b>					
a Debt-financed property					
b Not debt-financed property					
<b>6 Net rental income or (loss) from personal property</b>					
<b>7 Other investment income</b>					
<b>8 Gain or (loss) from sales of assets other than inventory</b>					-337,320
<b>9 Net income or (loss) from special events</b>					
<b>10 Gross profit or (loss) from sales of inventory</b>					
<b>11 Other revenue: a</b>					
b <u>LITIGATION CLAIMS</u>			1	2,493	
c <u>ENTERPRISE PRODUCTS</u>					5,400
d					
e					
<b>12 Subtotal. Add columns (b), (d), and (e)</b>		0		2,493	-152,492
<b>13 Total. Add line 12, columns (b), (d), and (e)</b>					13 -149,999

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

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

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

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.
  - (1) Cash
  - (2) Other assets
- b Other transactions
  - (1) Sales of assets to a noncharitable exempt organization
  - (2) Purchases of assets from a noncharitable exempt organization
  - (3) Rental of facilities, equipment, or other assets
  - (4) Reimbursement arrangements
  - (5) Loans or loan guarantees
  - (6) Performance of services or membership or fundraising solicitations
- c Sharing of facilities, equipment, mailing lists, other assets, or paid employees
- 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.

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

Yes  No

**b** If "Yes," complete the following schedule

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

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

4/21/2010  
Date

## SECRETARY-TREASURER

Trd

Sign Here

Signature of officer or trustee

Dat

Paid Preparer's Use Only	Preparer's signature	LAURINDA MARKIEWICH	Date	Check if self-employed ► <input type="checkbox"/>	Preparer's identifying number (see Signature on page 30 of the instructions)
			04/21/10		P00505657
	Firm's name (or yours if self-employed), address, and ZIP code	MARKIEWICH & MARTELLO, LLC 20102 CHAGRIN BLVD. SHAKER HEIGHTS, OH 44122-4947		EIN ► 34-1933866	Phone no 216-752-112

**Form 990-PF (2009)**

**Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets**

Whom Sold	Description	How Received		Cost	Expense	Depreciation	Net Gain/Loss
		Date Acquired	Date Sold				
PROSHARES TRUST ULTRA OIL	9/11/08	5/22/09	\$ 41,214	\$ 82,116	\$	\$ -40,902	
ING GLOBAL ADV & PREM OPP	10/31/05	5/01/09	28,721	50,000		-21,279	
ING GLOBAL EQUITY DIV & PREM	3/31/05	5/01/09	25,823	50,000		-24,177	
CITIGROUP CAPITAL XV PFD	9/07/06	8/12/09	54,983	69,148		-14,165	
DCA TOTAL RETURN FUND	1/25/08	8/19/09	5,794	27,509		-21,715	
DCA TOTAL RETURN FUND	2/28/05	8/19/09	6,622	60,000		-53,378	
DEVELOPERS DIVERSIFIED	3/24/03	8/19/09	32,685	50,000		-17,315	
ARLINGTON ASSET INVT CORP	2/24/05	9/10/09	1,382	56,550		-55,168	
ALASKA COMM SYS	4/25/08	10/13/09	34,524	44,970		-10,446	
OPPENHEIMER STRAT INC	10/06/08	10/27/09	125,000	115,262		9,738	
MS STRUCTURED SATURN	12/15/05	11/11/09	35,344	50,000		-14,656	
FIDELITY ADVISORS STRAT	10/06/08	12/03/09	PURCHASE	46,251		3,292	
HENDERSON WLD WIDE	1/05/04	5/09/09	49,543	46,251		-23,838	
OPPENHEIMER STRAT INC	VARIOUS	7/21/09	100,000	119,291		-19,291	
FIDELITY ADV STRAT	VARIOUS	8/13/09	PURCHASE	40,000	40,921	-921	
PRINCIPAL HI YLD	10/31/06	11/18/09	76,995	82,652		-5,657	
GENERAL ELECTRIC	3/30/06	12/31/09	30,447	57,889		-27,442	

**Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets (continued)**

Whom Sold	Date Acquired	Date Sold	How Received		Cost	Expense	Depreciation	Net Gain / Loss
			Sale Price	Received				
TOTAL			\$ 725,140	\$ 1,062,460	\$ 0	\$ 0	\$ 0	\$ -337,320

**Statement 2 - Form 990-PF, Part I, Line 11 - Other Income**

Description	Revenue per Books		Net Investment Income	Adjusted Net Income
	\$ 2,493	\$ 5,400		
LITIGATION CLAIMS	\$ 2,493	\$ 5,400	\$ 0	\$ 2,493
ENTERPRISE PRODUCTS				\$ 5,400
TOTAL	\$ 7,893		\$ 0	\$ 7,893

**Statement 3 - Form 990-PF, Part I, Line 16b - Accounting Fees**

Description	Total		Net Investment	Adjusted Net
	\$ 4,416	\$ 4,416		
MARKIEWICH & MARTELLO LLC	\$ 4,416	\$ 4,416	\$ 0	\$ 0
TOTAL				\$ 0

**Statement 4 - Form 990-PF, Part I, Line 16c - Other Professional Fees**

Description	Total		Net Investment	Adjusted Net
	\$ 4,669	\$ 12,921		
GRANTS CONSULTANT	\$ 4,669	\$ 8,921	\$ 0	\$ 4,669
RAYMOND JAMES BROKER FEES				\$ 4,000
TOTAL	\$ 17,590	\$ 8,921	\$ 0	\$ 8,669

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### Statement 5 - Form 990-PF, Part I, Line 18 - Taxes

<u>Description</u>	<u>Total</u>	<u>Net Investment</u>	<u>Adjusted Net</u>	<u>Charitable Purpose</u>
OHIO ATTORNEY GENERAL FEE	\$ 200	\$ 200	\$ 200	\$ 200
US TREASURY 990 TAX 2007	1,438	1,438		
<b>TOTAL</b>	<b>\$ 1,638</b>	<b>\$ 1,438</b>	<b>\$ 0</b>	<b>\$ 200</b>

### Statement 6 - Form 990-PF, Part I, Line 19 - Depreciation

<u>Description</u>	<u>Date Acquired</u>	<u>Cost Basis</u>	<u>Prior Year Depreciation</u>	<u>Method</u>	<u>Life</u>	<u>Current Year Depreciation</u>	<u>Net Investment Income</u>	<u>Adjusted Net Income</u>
COPIER	8/18/99	\$ 846	\$ 846	200DB	8	\$ 7	\$	\$
GATEWAY COMPUTER	2/09/00	3,782	3,782	200DB	5			
PRINTER	6/20/00	889	889	200DB	7			
COMPUTER	11/27/06	510	336	200DB	5	69		
PRINTER	4/19/08	275	165	200DB	5	44		
<b>TOTAL</b>		<b>\$ 6,302</b>	<b>\$ 6,018</b>			<b>\$ 113</b>	<b>\$ 0</b>	<b>\$ 0</b>

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**Statement 7 - Form 990-PF, Part I, Line 23 - Other Expenses**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES	\$	\$	\$	\$
OFFICE EXPENSE	477	210	250	
TELEPHONE	10	10		
BANK CHARGES	525		525	
DUES				
TOTAL	\$ 1,012	\$ 220	\$ 0	\$ 775

**Statement 7 - Form 990-PF, Part I, Line 23 - Other Expenses**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES	\$	\$	\$	\$
OFFICE EXPENSE	477	210	250	
TELEPHONE	10	10		
BANK CHARGES	525		525	
DUES				
TOTAL	\$ 1,012	\$ 220	\$ 0	\$ 775

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### Statement 8 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
RAYMOND JAMES	\$ 2,779,525	\$ 2,408,692	COST	\$ 2,337,368
TOTAL	\$ 2,779,525	\$ 2,408,692		\$ 2,337,368

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### Statement 9 - Form 990-PF, Part II, Line 14 - Land, Building, and Equipment

Description	Beginning Net Book	End Cost / Basis	End Accumulated Depreciation	Net FMV
OFFICE EQUIPMENT	\$ 284	\$ 6,302	\$ 6,131	\$
TOTAL	\$ 284	\$ 6,302	\$ 6,131	\$ 0

**Statement 10 - Form 990-PF, Part II, Line 15 - Other Assets**

Description	Beginning of Year	End of Year	Fair Market Value
RAYMOND JAMES SALE OF GE	\$ <u>                  </u>	\$ 30,446	\$ 30,446
TOTAL	\$ <u>                  </u> 0	\$ 30,446	\$ 30,446

**Statement 11 - Form 990-PF, Part II, Line 22 - Other Liabilities**

Description	Beginning of Year	End of Year
DUE TO STOLIER CRUT	\$ <u>                  </u>	\$ 737
TOTAL	\$ <u>                  </u> 0	\$ 737

**Statement 12 - Form 990-PF, Part III, Line 3 - Other Increases**

Description	Amount
ROUNDING	\$ <u>                  </u>
TOTAL	\$ <u>                  </u> 0

**Statement 13 - Form 990-PF, Part III, Line 5 - Other Decreases**

Description	Amount
2008 DIVIDEND INCOME REPORTED	\$ 4,779
TOTAL	\$ <u>                  </u> 4,779

**Statement 14 - Form 990-PF, Part XV, Line 2b - Application Format and Required Contents**

**Description**

WRITTEN REQUEST, LISTING DETAILS, PURPOSE, 501(C) (3)  
CLASSIFICATION, AND NEED

**Form 990-PF, Part XV, Line 2c - Submission Deadlines**

**Description**

JANUARY, APRIL, JULY AND OCTOBER, 15TH

**Statement 15 - Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations**

**Description**

RELIGIOUS, CHARITABLE, SCIENTIFIC, EDUCATION, PUBLIC SAFETY  
ANIMAL PROTECTION. MUST HAVE A DIRECT RELATIONSHIP WITH  
NORTH EAST OHIO

**Statement 16 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

Name	Address	Relationship	Status	Purpose	Amount
URSULINE COLLEGE PEPPER PIKE OH 44124	2550 LANDER RD N/A	PUBLIC	PUBLIC	SCHOLARSHIPS	40,000
HUMANE SOCIETY US WASHINGTON DC 20037	2100 L STREET NW N/A	PUBLIC	PUBLIC	ANIMAL CARE	2,000
CLEVELAND ZOO CLEVELAND OH 44109	1900 WILDLIFE WAY N/A	PUBLIC	PUBLIC	ANIMAL CARE	
OHIO FOUNDATION OF INDEPE COLUMBUS OH 43215	250 EAST BROAD ST N/A	PUBLIC	PUBLIC	SCHOLARSHIPS	
MAGNIFICAT HIGH SCHOOL CLEVELAND OH 44114	20770 HILLIARD BLVD N/A	PUBLIC	PUBLIC	FINANCIAL AID	
CASE DENTAL SCHOOL CLEVELAND OH 44106	10900 EUCLID AVE N/A	PUBLIC	PUBLIC	SCHOLARSHIPS	
CLEVELAND HEARING & SPEEC CLEVELAND OH 44106	11206 EUCLID AVE N/A	PUBLIC	PUBLIC	HEARING LOSS	
ESPERANZA CLEVELAND OH 44109	3104 WEST 25TH ST N/A	PUBLIC	PUBLIC	READING PROGRAM	
BOYS HOPE GIRLS HOPE GARFIELD HTS OH 44125	9616 GARFIELD BLVD N/A	PUBLIC	PUBLIC	ENDOWMENT	
CLEVELAND SCHOLARSHIP PRG CLEVELAND OH 44114	200 PUBLIC SQUARE N/A	PUBLIC	PUBLIC	ADVISORY PROGRAM	
UNIVERSITY SETTLEMENT CLEVELAND OH 44127	4800 BROADWAY AVE N/A	PUBLIC	PUBLIC	COMM. RESOURCE MANAGER	
CLEVELAND HOUSING NETWORK CLEVELAND OH 44114	2999 PAYNE AVE N/A	PUBLIC	PUBLIC	HOUSING SUPPORT PROGRAM	
CLEVELAND PUBLIC LIBRARY CLEVELAND OH 44114	325 SUPERIOR AVE N/A	PUBLIC	PUBLIC	DONATION	
ANIMAL PROTECTIVE LEAGUE CLEVELAND OH 44113	1729 WILEY AVE N/A	PUBLIC	PUBLIC	ANIMAL CARE	
PET SHELTER PARMA OH 44129	9555 BROOKPARK RD N/A	PUBLIC	PUBLIC	ANIMAL CARE	
YWCA CLEVELAND OH 44103	4019 PROSPECT AVE N/A	PUBLIC	PUBLIC	PACT PROGRAM	
CLEVELAND BASEBALL FED CLEVELAND OH 44107	17820 SHAW AVE N/A	PUBLIC	PUBLIC	PROGRAM SUPPORT	100
INTERFAITH HOSPITALITY SHAKER HTS OH 44122	3445 WARRENSVILLE CNTR RD N/A	PUBLIC	PUBLIC	HOMELESS CHILDREN TRANSPORTATION	

**Statement 16 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)**

Name	Address	Relationship	Status	Purpose	Amount
GARFIELD MIDDLE SCHOOL LAKewood OH 44107	13114 DETROIT AVE N/A	PUBLIC	PUBLIC	AQUATIC ENVIRONMENT STUDY	
CHILDREN'S MUSEUM CLEVELAND OH 44106	10730 EUCLID AVE N/A	PUBLIC	PUBLIC	OPERATING SUPPORT	
TRI-CITY LUPUS ELYRIA, OH 44035	401 BROAD ST N/A	PUBLIC	PUBLIC	SELF HELP PROGRAM	
NAMI CLEVELAND OH 44113	1400 WEST 25TH ST N/A	PUBLIC	PUBLIC	PARENT EDUCATION PROGRAM	2,500
BEECH BROOK CLEVELAND OH 44124	3737 LANDER RD N/A	PUBLIC	PUBLIC	OUTREACH PROGRAM EXPANSION	
ADOPTION NETWORK CLEVELAND OH 44101	4614 PROSPECT AVE N/A	PUBLIC	PUBLIC	CAPACITY BUILDING MATCHING PROGRAM	
TRI-C FOUNDATION CLEVELAND OH 44115	700 CARNEGIE AVE N/A	PUBLIC	PUBLIC	PAROCHIAL SCHOOL SCHOLARSHIPS	
WINGS OVER JORDAN CLEVELAND HTS. OH 44118	PO BOX 18298 N/A	PUBLIC	PUBLIC	HIGH SCHOOL PROGRAM	
BEREA ANIMAL RESCUE BEREA OH 44017	390 BARRETT ROAD N/A	PUBLIC	PUBLIC	EMERGENCY ANIMAL MEDICAL CARE	
FIDO COMPANION RESCUE AVON OH 44011	P.O. BOX 578 N/A	PUBLIC	PUBLIC	ANIMAL RESCUE	500
NE OHIO SPCA PARMA OH 44129	8555 BROOKPARK RD N/A	PUBLIC	PUBLIC	ANIMAL CARE	150
FOUNDATION CENTER CLEVELAND OH 44115	1422 EUCLID AVE # 1606 N/A	PUBLIC	PUBLIC	NOT FOR PROFIT ASSISTANCE	300
PROVIDENCE HOUSE CLEVELAND OH 44113	2037 W. 32ND ST. N/A	PUBLIC	PUBLIC	PROGRAM SUPPORT	700
TOTAL					<u><u>97,250</u></u>

Form 4562

Department of the Treasury  
Internal Revenue Service

(99)

Depreciation and Amortization  
(Including Information on Listed Property)

OMB No 1545-0172

2009

Attachment  
Sequence No 67Name(s) shown on return THE HELEN & LOUIS STOLIER  
FAMILY FOUNDATIONIdentifying number  
34-6991709

Business or activity to which this form relates

## INDIRECT DEPRECIATION

## Part I Election To Expense Certain Property Under Section 179

Note: If you have any listed property, complete Part V before you complete Part I.

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

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

## Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.) (See instr.)

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

## Part III MACRS Depreciation (Do not include listed property.) (See instructions.)

## Section A

17	MACRS deductions for assets placed in service in tax years beginning before 2009	17	113
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here ►	<input type="checkbox"/>	

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

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only—see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs.		S/L	
h Residential rental property			27 5 yrs	MM	S/L	
			27 5 yrs	MM	S/L	
i Nonresidential real property			39 yrs	MM	S/L	
				MM	S/L	

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

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

## Part IV Summary (See instructions.)

21 Listed property Enter amount from line 28	21	
22 Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations—see instructions	22	113
23 For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

For Paperwork Reduction Act Notice, see separate instructions.

DAA

**Federal Asset Report**  
**Form 990, Page 1**

Asset	Description	Date In Service	Cost	Bus %	Sec 179	Bonus	Basis for Depr	PerConv	Meth	Prior	Current
<b>Prior MACRS:</b>											
1 COPIER		8/18/99	846				846	7	HY 200DB	846	0
2 GATEWAY COMPUTER		2/09/00	3,782				3,782	5	HY 200DB	3,782	0
3 PRINTER		6/20/00	889				889	7	HY 200DB	889	0
4 COMPUTER		11/27/06	510				510	5	MQ200DB	336	69
5 PRINTER		4/19/08	275				X	5	HY 200DB	165	44
			<u>6,302</u>				<u>6,165</u>			<u>6,018</u>	<u>113</u>
<b>Grand Totals</b>											
<b>Less: Dispositions and Transfers</b>											
<b>Less: Start-up/Org Expense</b>											
<b>Net Grand Totals</b>											
			<u>6,302</u>				<u>6,165</u>			<u>6,018</u>	<u>113</u>

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## Federal Statements

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### Taxable Interest on Investments

Description	Amount	Unrelated Business Code	Exclusion Code	Postal Code
HUTINGTON BANK INTEREST	\$ 2			
RAYMOND JAMES	<u>23,620</u>			
TOTAL	\$ <u>23,622</u>			

### Taxable Dividends from Securities

Description	Amount	Unrelated Business Code	Exclusion Code	Postal Code
RAYMOND JAMES	\$ 155,806			
OTHER TO BALANCE				
TOTAL	\$ <u>155,806</u>			

### Other Investment Income

Description	Amount	Unrelated Business Code	Exclusion Code	Postal Code
NON DIVIDEND DISTRIBUTIONS	\$ _____			
TOTAL	\$ <u>0</u>			