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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

OMB No 1545-0052

2009

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 THE THOMASSON FOUNDATION		A Employer identification number 35-1870799
	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) (317) 805-5049
	PO BOX 80238		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 ☐
	City or town, state, and ZIP code INDIANAPOLIS, IN 46280		
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) \$ 146,394.		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	231,708.	ATCH 1		
	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	490.	490.		ATCH 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-410.			
	b Gross sales price for all assets on line 6a	23.			
	7 Capital gain net income (from Part IV, line 2)				
	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	231,788.	490.		
	13 Compensation of officers, directors, trustees, etc.	0.			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule) ATCH 3	1,568.	0.	0.	1,568.
	b Accounting fees (attach schedule) ATCH 4	850.	0.	0.	850.
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions) *	87.			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) ATCH 6	101.	101.		
	24 Total operating and administrative expenses. Add lines 13 through 23	2,606.	101.	0.	2,418.
	25 Contributions, gifts, grants paid	216,250.			216,250.
	26 Total expenses and disbursements. Add lines 24 and 25	218,856.	101.	0.	218,668.
	27 Subtract line 26 from line 12	12,932.			
	a Excess of revenue over expenses and disbursements		389.		
	b Net investment income (if negative, enter -0-)				
	c Adjusted net income (if negative, enter -0-)			-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	125,087.	138,420.	138,420.
	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)			
	b Investments - corporate stock (attach schedule) <u>ATCH 7</u>	38,932.	38,531.	7,974.
	c Investments - corporate bonds (attach schedule)			
	11 Investments - land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶			
	12 Investments - mortgage loans			
	13 Investments - other (attach schedule)			
	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)	164,019.	176,951.	146,394.	
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 ▶ ☐			
	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			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	164,019.	176,951.	
	30 Total net assets or fund balances (see page 17 of the instructions)	164,019.	176,951.	
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	164,019.	176,951.		

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	164,019.
2 Enter amount from Part I, line 27a	2	12,932.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	176,951.
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	176,951.

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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 SCHEDULE					
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	-410.	
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	251,850.	126,860.	1.985259
2007	60,185.	27,654.	2.176358
2006	149,226.	12,273.	12.158885
2005	37,161.	12,646.	2.938558
2004	175,497.	14,529.	12.079083
2 Total of line 1, column (d)			2 31.338143
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 6.267629
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 109,326.
5 Multiply line 4 by line 3			5 685,215.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 4.
7 Add lines 5 and 6			7 685,219.
8 Enter qualifying distributions from Part XII, line 4 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.			8 218,668.

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

1	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1		
2	Date of ruling or determination letter _____ (attach copy of ruling letter if necessary - see instructions)		
3	b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	8.
4	c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
5	2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	
6	3 Add lines 1 and 2	3	8.
7	4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0.
8	5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	5	8.
9	6 Credits/Payments		
10	a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	
11	b Exempt foreign organizations-tax withheld at source	6b	0.
12	c Tax paid with application for extension of time to file (Form 8868)	6c	0.
13	d Backup withholding erroneously withheld	6d	
14	7 Total credits and payments Add lines 6a through 6d	7	0.
15	8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	
16	9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	8.
17	10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
18	11 Enter the amount of line 10 to be Credited to 2010 estimated tax 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
1b 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		
1c 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? If "Yes," attach a detailed description of the activities		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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
4b If "Yes," has it filed a tax return on Form 990-T for this year?		X
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		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?	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) IN,		
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 ☐ JEFFREY THOMASSON Telephone no ☐ (317) 843-5678			
	Located at ☐ 11711 N MERIDIAN, STE 600 INDIANAPOLIS, IN ZIP + 4 ☐ 46032			
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	
Organizations relying on a current notice regarding disaster assistance check here ☐		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? ☐ Yes ☒ No		
If "Yes," list the years ☐		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see page 20 of the instructions)	2b	
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)? **5b** ☐ 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? **6b** ☐ 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? **7b** ☐ 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
ATTACHMENT 8		0.	-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				

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 **NONE**

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 NONE	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)

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

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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	8,217.
b	Average of monthly cash balances	1b	102,774.
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0.
d	Total (add lines 1a, b, and c)	1d	110,991.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	110,991.
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	1,665.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	109,326.
6	Minimum investment return. Enter 5% of line 5	6	5,466.

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	5,466.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	8.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	8.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	5,458.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	5,458.
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	5,458.

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	218,668.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	0.
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	0.
b	Cash distribution test (attach the required schedule)	3b	0.
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	218,668.
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	N/A
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	218,668.

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				5,458.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only				
b Total for prior years 20 07 20 06 20 05				
3 Excess distributions carryover, if any, to 2009				
a From 2004 176,810.				
b From 2005 36,536.				
c From 2006 148,670.				
d From 2007 58,819.				
e From 2008 245,594.				
f Total of lines 3a through e	666,429.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 218,668.				
a Applied to 2008, but not more than line 2a				
b Applied to undistributed 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 distributable amount				5,458.
e Remaining amount distributed out of corpus	213,210.			
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	879,639.			
b Prior years' undistributed income Subtract line 4b from line 2b				
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				
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions				
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.				
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)	176,810.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	702,829.			
10 Analysis of line 9				
a Excess from 2005 36,536.				
b Excess from 2006 148,670.				
c Excess from 2007 58,819.				
d Excess from 2008 245,594.				
e Excess from 2009 213,210.				

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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)

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
(a) 2009	(b) 2008	(c) 2007	(d) 2006	

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))

JEFFREY THOMASSON

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

N/A

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

ATTACHMENT 9

c Any submission deadlines

NONE

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

ATTACHMENT 10

Part XV Supplementary Information (continued)**3. Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> ATTACHMENT 11				
Total.			3a	216,250.
b <i>Approved for future payment</i>				
Total.			3b	

Form 990-PF (2009)

[illegible][illegible]

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? | | Yes | No |
|---|--|-----|----|
| a Transfers from the reporting foundation to a noncharitable exempt organization of | | | |
| (1) Cash | | | X |
| (2) Other assets | | | X |
| b Other transactions | | | |
| (1) Sales of assets to a noncharitable exempt organization | | | X |
| (2) Purchases of assets from a noncharitable exempt organization | | | X |
| (3) Rental of facilities, equipment, or other assets | | | X |
| (4) Reimbursement arrangements | | | X |
| (5) Loans or loan guarantees | | | X |
| (6) Performance of services or membership or fundraising solicitations | | | X |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees | | | X |
| d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | | |

[illegible]

- 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

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.			
	 Signature of officer or trustee		5/14/10 Date	President Title
Paid Preparer's Use Only	 Preparer's signature		5/10/10 Date	Check if self-employed ☒ Preparer's identifying number (See Signature on page 30 of the instructions) P00786370
	Firm's name (or yours if self-employed), address, and ZIP code C.A. RHODES & CO. LLC 27 HAMPTON LANE CINCINNATI, OH 45208		EIN 20-5442765 Phone no 513-871-4048	

Schedule of Contributors

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

OMB No 1545-0047

2009

Name of the organization

THE THOMASSON FOUNDATION

Employer identification number

35-1870799

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

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

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

General Rule

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

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 $\frac{1}{3}$ % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ _____

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

Name of organization THE THOMASSON FOUNDATION

Employer identification number
35-1870799**Part I Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	JEFFREY H. THOMASSON PO BOX 80238 INDIANAPOLIS, IN 46280	\$ 231,708.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

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)	
23.		.47 SHARES OF PNC CORP PROPERTY TYPE: SECURITIES 433.				D	08/11/2004	01/06/2009
							-410.	
TOTAL GAIN (LOSS)							<u>-410.</u>	

THE THOMASSON FOUNDATION

35-1870799

FORM 990PF, PART I - CONTRIBUTIONS, GIFTS AND GRANTS RECEIVED

ATTACHMENT 1

NAME AND ADDRESS	DATE	DIRECT PUBLIC SUPPORT
JEFFREY H. THOMASSON PO BOX 80238 INDIANAPOLIS, IN 46280	12/07/2009	231,708.
TOTAL CONTRIBUTION AMOUNTS		231,708.

ATTACHMENT 2FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
DIVIDEND INCOME	490.	490.
TOTAL	<u>490.</u>	<u>490.</u>

ATTACHMENT 3FORM 990PF, PART I - LEGAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
LEGAL FEES	1,568.			1,568.
TOTALS	<u>1,568.</u>	<u>0.</u>	<u>0.</u>	<u>1,568.</u>

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
TAX PREPARATION	850.			850.
TOTALS	850.	0.	0.	850.

FORM 990PF, PART I - TAXES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>
2008 FEDERAL TAX LIABILITY	87.
TOTALS	<u>87.</u>

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
MISCELLANEOUS	101.	101.
TOTALS	101.	101.

FORM 990PF, PART II - CORPORATE STOCKATTACHMENT 7

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
PIMCO TOTAL RETURN FUND	474.	507.	524.
NATIONAL CITY CORP	434.	0.	0.
HUNTINGTON BANCSHARES	38,024.	38,024.	7,450.
TOTALS	<u>38,932.</u>	<u>38,531.</u>	<u>7,974.</u>

THE THOMASSON FOUNDATION

35-1870799

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEESATTACHMENT 8

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>
JEFFREY THOMASSON PO BOX 80238 INDIANAPOLIS, IN 46280	PRES./TREAS./SECR./DIRECTOR	0.
BENITA THOMASSON PO BOX 80238 INDIANAPOLIS, IN 46280	VP/DIRECTOR	0.
ROBERT ELZER PO BOX 80238 INDIANAPOLIS, IN 46280	DIRECTOR	0.
BRITTANY THOMASSON PO BOX 80238 INDIANAPOLIS, IN 46280	VP	0.
J ELLIOTT THOMASSON PO BOX 80238 INDIANAPOLIS, IN 46280	VP	0.
GRAND TOTALS		<u>0.</u>

990PF, PART XV - FORM AND CONTENTS OF SUBMITTED APPLICATIONS

APPLICATION SHOULD INCLUDE THE FOLLOWING:

- 1) ACADEMIC TRANSCRIPT
- 2) STANDARDIZED TEST SCORED (SAT, ACT, ETC.)
- 3) WRITTEN DESCRIPTION OF FINANCIAL NEED
- 4) WRITTEN ESSAY BY THE APPLICANT DESCRIBING HIS OR HER ASPIRATIONS
- 5) LIST OF ALL EXTRACURRICULAR ACTIVITIES
- 6) LIST OF ALL ACADEMIC HONORS AND ACHIEVEMENT AWARDS
- 7) WRITTEN RECOMMENDATION BY AN UNRELATED PARTY
- 8) LIST OF ALL INSTITUTIONS TO WHICH THE APPLICANT WILL APPLY

990PF, PART XV - RESTRICTIONS OR LIMITATIONS ON AWARDS

INITIALLY, THE FOUNDATION PROPOSES TO PROVIDE SCHOLARSHIPS TO THOSE CHILDREN OF CHRISTIAN MISSIONARIES IN THE U.S. AND FOREIGN COUNTRIES WHO NEED FINANCIAL ASSISTANCE TO ENABLE THEM TO ATTEND UNDERGRADUATE INSTITUTIONS OF HIGHER EDUCATION. THE FOUNDATION HAS OPENED UP THE APPLICANT POOL TO OTHERS.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 11

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR

AND

FOUNDATION STATUS OF RECIPIENT

RECIPIENT NAME AND ADDRESS

PURPOSE OF GRANT OR CONTRIBUTION

AMOUNT

SEE SCHEDULE ATTACHED

NONE

509 (A) 1

SEE SCHEDULE ATTACHED

216,250

TOTAL CONTRIBUTIONS PAID

216,250

THE THOMASSON FOUNDATION
35-1870789
Part XV, Line 3 - Grants From Foundation
12/31/09

RECIPIENT NAME	ADDRESS	City / State	FOR	PURPOSE	AMOUNT	Date	Ck #
Appalachian Bible College	PO Box ABC	Bradley, WV 25818	Hannah Fogel	Education	3,000.00	7/1/09	977
Bola University	13800 Bola Avenue	La Mirada CA 90639	Sarah Joy Palmer	Education	3,000.00	7/1/09	984
Calvin College	3201 Burton Street SE	Grand Rapids, MI 49546	Amy Petersen	Education	3,000.00	7/1/09	985
Campdown, Inc	5341 West 86th Street	Indianapolis, IN 46208		Missions	5,000.00	12/7/09	1019
Campus Crusade for Christ	PO Box 628222	Orlando, FL 32862	Bruce and Kathleen McClenahan	Missions	7,500.00	12/7/09	1003
Campus Crusade for Christ	PO Box 628222	Orlando, FL 32862	Ken and Kae Mientz	Missions	5,000.00	12/7/09	1004
Campus Crusade for Christ	PO Box 628222	Orlando, FL 32862	Mark and Dawn Michal	Missions	2,500.00	12/7/09	1021
Campus Crusade for Christ	PO Box 628222	Orlando, FL 32862	Justin and Heather O'Malley	Missions	7,500.00	12/7/09	1022
Campus Crusade for Christ	PO Box 628222	Orlando, FL 32862	Student Ventures	Missions	2,500.00	12/7/09	1014
Campus Crusade for Christ	PO Box 628222	Orlando, FL 32862	Louis and Wendy Sanchez	Missions	5,000.00	12/7/09	1020
Children's Museum	3000 N. Meridian Street	Indianapolis, IN 46208		Donation	1,000.00	12/7/09	1017
College Park Baptist Church	2606 West 96th Street	Indianapolis, IN 46268		Donation	60,000.00	12/7/09	1007
College Park Baptist Church	2606 West 96th Street	Indianapolis, IN 46268		Donation	500.00	12/7/09	1026
Common Ground Christian Church	4550 N. Illinois Street	Indianapolis, IN 46208		Donation	1,500.00	12/7/09	1016
Eastern Mennonite University	120 Park Road	Hampsonburg, VA 22802	Audrey Wolcott	Education	3,000.00	7/1/09	996
Eastern Mennonite University	120 Park Road	Hampsonburg, VA 22802	Timothy Heischman	Education	3,000.00	7/1/09	981
Eiteljorg Museum of Indians and Western Art	500 W. Washington Street	Indianapolis, IN 46204		Donation	1,500.00	12/7/09	1008
Goshen College	1700 South Main Street	Goshen, IN 46526	David Zwiier	Education	3,000.00	7/1/09	997
Indiana University	PO Box 500	Bloomington, IN 47402	Ryan Moyer	Education	3,000.00	7/1/09	973
Indiana Wesleyan University	4201 South Washington Street	Manon, IN 46953	Kelley School of Business	Education	2,500.00	12/7/09	1018
Indianapolis Museum of Art	1200 West 38th Street	Indianapolis, IN 46208	Emily Nichols	Education	3,000.00	7/1/09	983
Indianapolis Symphony Orchestra	32 East Washington Street	Indianapolis, IN 46204		Donation	1,000.00	12/7/09	1009
Indianapolis Zoological Society, Inc	1200 West Washington Street	Indianapolis, IN 46222		Donation	1,000.00	8/24/09	999
InterVarsity Christian Fellowship	PO Box 7895	Madison, WI 53791	Nussbaum Society	Donation	1,000.00	12/7/09	1010
John Brown University	2000 West University	Sloam, AK 72761	Paula Gay	Missions	750.00	7/1/09	978
John Brown University	2000 West University	Sloam, AK 72761	Jonathan Greenlee	Education	3,000.00	7/1/09	979
John Brown University	2000 West University	Sloam, AK 72761	Sarah Greenlee	Education	3,000.00	7/1/09	982
Mayo Foundation	200 First Street	Sloam, AK 72761	Lucas Keagy	Education	3,000.00	7/1/09	983
Muthomah University	8435 N. E. Glsan Street	Rochester, MN 55905	Lucas Quezada	Donation	2,500.00	12/7/09	1013
OMS International	PO Box 4528	Portland, OR 97220	Deborah Witting	Education	3,000.00	7/1/09	988
RCE International	236 West Reade Avenue	Monument, CO 80132	Paul and Ellie Madson	Missions	5,000.00	12/7/09	1005
Taylor University	PO Box 969	Wheaton, IL 60189	Emily Hams	Missions	5,000.00	12/7/09	1024
TEAM	5400 College Drive	Upland, IN 46989	Rachel Tomasiak	Education	3,000.00	7/1/09	995
The Baptist College of Florida	2301 North Park Avenue	Wheaton, IL 60187	Kathi Small	Missions	5,000.00	12/7/09	1006
The Oaks Academy	3950 Meadows Drive	Graceville, FL 32440	Revani Rosalia	Education	3,000.00	7/1/09	991
Trindley School	12 West Jersey Street	Indianapolis, IN 46205		Donation	10,000.00	12/7/09	1015
Union County College	1050 University Drive	Indianapolis, IN 46205	Yaelen St. Amour	Donation	1,000.00	10/26/09	1001
Union University	1050 University Drive	Elizabeth, NJ 07201	Cheryl Propst	Education	3,000.00	7/1/09	983
Union University	1050 University Drive	Jackson, TN 38305	Kelly Reed	Education	3,000.00	7/1/09	986
Union University	1050 University Drive	Jackson, TN 38305	Kevin Reed	Education	3,000.00	7/1/09	989
Union University	1050 University Drive	Jackson, TN 38305	Linda Propst	Education	3,000.00	7/1/09	990
University of Indianapolis	1400 East Hanna Avenue	Indianapolis, IN 46227	Jessica Stucky	Education	3,000.00	7/1/09	987
WFYI	501 College Ave	Indianapolis, IN 46202		Donation	2,500.00	12/7/09	998
Wheaton College	501 College Ave	Wheaton, IL 60187	Andrea Agee	Donation	3,000.00	7/1/09	1011
Wheaton College	501 College Ave	Wheaton, IL 60187	Matthew Agee	Education	3,000.00	7/1/09	974
Wheeler Mission Ministries	205 East New York Street	Wheaton, IL 60187	Steven Doelman	Education	3,000.00	7/1/09	975
World Gospel Mission	PO Box 948	Indianapolis, IN 46204	John and Priscilla Kunkle	Education	2,500.00	12/7/09	976
TOTAL				Missions	5,000.00	12/7/09	1025
					\$ 218,250.00		1012