

See a Social Security Number? Say Something! Report Privacy Problems to https://public.resource.org/privacy Or call the IRS Identity Theft Hotline at 1-800-908-4490



Form **990-PF**

Return of Private Foundation

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

OMB No 1545-0052

			be able to use a copy of this			
Fore	caler	dar year 2009, or tax year beginning DEC		, and ending	DEC 31, 2009	
G C	heck	all that apply: X Initial return		ormer public charity	Final return	1
		Amended return	Address chan	ge 🔲	Name change	
Use	the	Name of foundation			A Employer identification	number
	abel					
Oth	erwi	se, <mark>DON JACOBS CHARITABLE</mark>	FOUNDATION,	INC.	35-2373932	
	print		elivered to street address)	Room/suite	B Telephone number	
	type	HZ0 IRODI BROOD I BROD			859-977-32	109
	Spe ructio	one City of town, State, and ZIP code			C It exemption application is p	ending, check here
	1000	LEXINGTON, KY 40509			D 1 Foreign organizations	
H_C	heck	type of organization: X Section 501(c)(3) ex	empt private foundation		Foreign organizations me check here and attach co	omputation Lest,
	Se	ction 4947(a)(1) nonexempt charitable trust	Other taxable private founda		E If private foundation sta	tus was terminated
I Fa	ur ma	irket value of all assets at end of year J Accounti	ng method: X Cash	Accrual	under section 507(b)(1))(A), check here $ ightharpoonup$
		Part II, col (c), line 16)	her (specify)		F If the foundation is in a	60-month termination
_	\$	3,500,000. (Part I, colu	mn (d) must be on cash l	basis)	under section 507(b)(1))(B), check here
Pa	ırt I	(The total of amounts in columns (b), (c), and (d) may not	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes
		necessarily equal the amounts in column (a))		moomo	 	(cash basis only)
	1	Contributions, gifts, grants, etc., received	3,500,000.		N/A	
	2	Check fit if the foundation is not required to attach Sch. B. Interest on savings and temporary				
	3	cash investments		<u> </u>	-	
	4	Dividends and interest from securities				
, ,	l .	Gross rents				
	_	Net rental income or (loss)				
ne	62	Net gain or (loss) from sale of assets not on line 10 Gross sales price for all				
Revenue	7	assets on line 6a		0.		
æ	7	Capital gain net income (from Part IV line 2)		<u> </u>		
	8	Net short-term capital gain Income modifications				
	9	Gross sales less returns				,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
	10a	and allowances				
		Gross profit or (loss)				
,	11	Other income				
	12	Total Add lines 1 through 11	3,500,000.	0.		
	13	Compensation of officers, directors, trustees, etc	0.	0.		0.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits		- <u>-</u>		,
es		Legal fees				
ens		Accounting fees				
Administrative Expens	!	Other professional fees			RECEIVE	20
ve E	17	Interest	2			S
atı	18	Taxes			MAY 1 4 201	
istr	19	Depreciation and depletion		Ĭ	MAY 1 4 201	
min	20	Occupancy				
Ad	21	Travel, conferences, and meetings			OGDEN, L	
and	22	Printing and publications				
g a	23	Other expenses				
atir	24	Total operating and administrative				
Operating		expenses. Add lines 13 through 23	0.	0.		0.
0	25	Contributions, gifts, grants paid				
	26	Total expenses and disbursements				
		Add lines 24 and 25	0.	0.		0.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	3,500,000.	<u> </u>		
	b	Net investment income (if negative, enter -0-)		0.		
	C	Adjusted net income (if negative, enter -0-)			N/A	<u> </u>

For	m 99	0-PF (2009) DON JACOBS CHARITABLE	FOUNDATION,	INC.	35	2373932	Page 2
	ort	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year		End o		
L	art	Column should be for end-of-year amounts only	(a) Book Value		(b) Book Value	(c) Fair Market	Value
	1	Cash - non-interest-bearing			3,500,000.	3,500	<u>,000.</u>
	2	Savings and temporary cash investments				:	
	3	Accounts receivable	_]				
	ŀ	Less: allowance for doubtful accounts ▶					
	4	Pledges receivable ▶					
	ĺ	Less: allowance for doubtful accounts ▶	7				
	5	Grants receivable					
	6	Receivables due from officers, directors, trustees, and other					
		disqualified persons					
	7	Other notes and loans receivable					
		Less: allowance for doubtful accounts ▶	7				
s	8	Inventories for sale or use					
Assets	_	Prepaid expenses and deferred charges		İ			
As	4	Investments - U.S. and state government obligations					
		Investments - corporate stock					
	1	Investments - corporate bonds					
	1	Investments - land buildings and equipment basis					
	ļ.,	Less accumulated depreciation	7				
	12	Investments - mortgage loans					
	13	Investments - other					
	1	Land, buildings, and equipment: basis					·
	' '	Less accumulated depreciation	┪	i			
	15	Other assets (describe	\				
	'3	Other describe	'				
	16	Total assets (to be completed by all filers)		0.	3,500,000.	3,500	000.
_	1	Accounts payable and accrued expenses		- 	3,300,000.	3,300	, 000.
		Grants payable					
'n		Deferred revenue					
ţ	20	Loans from officers directors, trustees and other disqualified persons					
Liabilities		Mortgages and other notes payable					
Ë	l .	Other liabilities (describe	1				
		One natimes (accorded	′ 				
	23	Total liabilities (add lines 17 through 22)		0.	0.		
_		Foundations that follow SFAS 117, check here		 			
		and complete lines 24 through 26 and lines 30 and 31					
es	24	Unrestricted					
anc	25	Temporarily restricted		-			
Bal	ı	Permanently restricted					
힏		Foundations that do not follow SFAS 117, check here					
Ţ	l	and complete lines 27 through 31.					
ò	27	Capital stock, trust principal, or current funds		0.	0.		
ets	28	Paid-in or capital surplus, or land, bldg., and equipment fund	· · · · · · · · · · · · · · · · · · ·	0.	0.		
Ass	29	Retained earnings, accumulated income, endowment, or other funds		0.	3,500,000.		
Net Assets or Fund Balances	30	Total net assets or fund balances		0.	3,500,000.		
_	•				<u> </u>		
	31	Total liabilities and net assets/fund balances		0.	3,500,000.		
			Balances	 1	3,000,000		
뜨	art	III Analysis of Offanges III Net Assets of Fulld					
1		net assets or fund balances at beginning of year - Part II, column (a), lir	ne 30				_
		agree with end-of-year figure reported on prior year's return)			1	<u> </u>	0.
		amount from Part I, line 27a			2	3,500	
		r increases not included in line 2 (itemize)			3	<u> </u>	<u> </u>
		lines 1, 2, and 3			4	3,500	
-		eases not included in line 2 (itemize)			5	3 500	0.
c	Total	not access or fund balances at and of year (line 4 minus line 5) - Part II	actume (b) line 20		l c i		$\alpha\alpha\alpha$

Form **990-PF** (2009)

, , Form 990-PF (2009)

Part IV Capital Gains a	ind Losses for Tax o	n investmen	t mcome					
	be the kind(s) of property solo ehouse; or common stock, 20			(b) l	łow acquired - Purchase - Donation	(c)	Date acquired no., day, yr.)	(d) Date sold (mo., day, yr.)
1a								
b NON	IE .	·						
C				<u> </u>				·-· ·
d				<u> </u>				
е			·	<u> </u>	_			
(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale				(h) Gain or (loss) e) plus (f) minus (
a								
b			_					
С								
d								
e								
Complete only for assets showing	gain in column (h) and owne	d by the foundation	n on 12/31/69				ıns (Col. (h) gain	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69		col. (j), if any			COI. (K)	, but not less than osses (from col. (n -U-) or h))
a								
b								
c						-		
d								
e								
Capital gain net income or (net cap Net short-term capital gain or (loss	s) as defined in sections 1222	enter in Part I, line ter -0- in Part I, line (5) and (6):	7 37	}	2			
If gain, also enter in Part I, line 8, c	olumn (c).							
If (loss), enter -0- in Part I, line 8 Part V Qualification Ur	der Section 4940(e)	for Reduced	1 Tay on Net	Inv	estment	Incon	ne .	
(For optional use by domestic private If section 4940(d)(2) applies, leave thi		ction 4940(a) tax or	net investment in	come	2.)			N/A
Was the foundation liable for the section of the section of the foundation does not qualiful the foundation does not qualiful the foundation does not qualiful the foundation of the foundation of the foundation liable for the section of the section	y under section 4940(e). Do r	not complete this pa	art.					Yes No
(a)			inaking any emin			Т		(d)
Base periód years Calendar year (or tax year beginnin	g in) Adjusted qualifyir		Net value of no	(c) inchai		sets		ution ratio ided by col. (c))
2008								
2007								
2006								
2005								
2004	i							
							<u> </u>	
• • • • • • • • • • • • • • • • • • •		· · · · ·	<u> </u>					
			<u> </u>	-6			2	
3 Average distribution ratio for the 5	•	total on line 2 by 5,	or by the number	of ye	ars	<u> </u>		
 Total of line 1, column (d) Average distribution ratio for the 5-the foundation has been in existence 	•	total on line 2 by 5,	or by the number	of ye	ars		2 3	
3 Average distribution ratio for the 5	ce if less than 5 years	• /	or by the number	of ye	ars			
3 Average distribution ratio for the 5- the foundation has been in existent	ce if less than 5 years	• /	or by the number	of ye	ars		3	
 Average distribution ratio for the 5- the foundation has been in existent Enter the net value of noncharitable 	ce if less than 5 years e-use assets for 2009 from Pa	• /	or by the number	of ye	ars	-	3	
 Average distribution ratio for the 5-the foundation has been in existent Enter the net value of noncharitable Multiply line 4 by line 3 	ce if less than 5 years e-use assets for 2009 from Pa	• /	or by the number	of ye	ars	-	3 4 5	
Average distribution ratio for the 5- the foundation has been in existence Enter the net value of noncharitable Multiply line 4 by line 3 Enter 1% of net investment income	ce if less than 5 years e-use assets for 2009 from Pa e (1% of Part I, line 27b) Part XII, line 4	art X, line 5					3 4 5	

DON JACOBS CHARITABLE FOUNDATION, INC.

35-2373932

Page 3

Form 990-PF (2009)

			/ 3932		Page 4
		0 - 5e	e ilisuu	Cuo	115)
	Exempt operating foundations described in section 4940(d)(2), check here and enter *N/A* on line 1.				
	Date of ruling or determination letter:				^
	Domestic foundations that meet the section 4940(e) requirements in Part V, check here and enter 1%	-			0.
	of Part I, line 27b				
	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)				^
	fax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	1			<u>0.</u>
	Add lines 1 and 2				0.
	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)				0.
	Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-	-			0.
	Credits/Payments:				
	2009 estimated tax payments and 2008 overpayment credited to 2009	ŀ			
	Exempt foreign organizations - tax withheld at source				
	Fax paid with application for extension of time to file (Form 8868)				
	Backup withholding erroneously withheld				_
	Total credits and payments. Add lines 6a through 6d	<u>' </u>			0.
8 E	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached	3			
	Fax due If the total of lines 5 and 8 is more than line 7, enter amount owed)			0.
10 (Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	0			
	nter the amount of line 10 to be: Credited to 2010 estimated tax ▶ Refunded ▶ 1	1			
Par	t VII-A Statements Regarding Activities				1
1a [During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in			Yes	
a	any political campaign?		1a		X
b [Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?		16		X
1	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published o	r	-		
c	distributed by the foundation in connection with the activities.				
c [Oid the foundation file Form 1120-POL for this year?		1c		X
d E	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:				
(1) On the foundation. \blacktriangleright \$ 0 . (2) On foundation managers. \blacktriangleright \$ 0 .				i
	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation				
r	managers. ► \$ 0.				
2 H	Has the foundation engaged in any activities that have not previously been reported to the IRS?		2		Х
	f "Yes," attach a detailed description of the activities				
3 H	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or				
	pylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		Х
4a (Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		Х
	f "Yes," has it filed a tax return on Form 990-T for this year?	N/A	4b		
5 V	Nas there a liquidation, termination, dissolution, or substantial contraction during the year?		5		X
1	f "Yes," attach the statement required by General Instruction T.				
6 /	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:				
	By language in the governing instrument, or				
	 By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law 	,			
	remain in the governing instrument?		6	х	
7 [Did the foundation have at least \$5,000 in assets at any time during the year?		7	Х	
	f "Yes," complete Part II, col. (c), and Part XV				
	Enter the states to which the foundation reports or with which it is registered (see instructions)		l		
	KY		_		
-	f the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)		-		İ
	of each state as required by General Instruction G? If "No," attach explanation		8b	х	
	s the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calenda	r	70		T
	rear 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV	•	9		х
	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses STN	(T 1	10	х	1
	D 11		Form 990		(0000)

02-02-10

	990-PF (2009) DON JACOBS CHARITABLE FOUNDATION, INC. 35-2373 art VII-A Statements Regarding Activities (continued)	932	F	Page 5
	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
••	section 512(b)(13)? If "Yes," attach schedule (see instructions)	11	l	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 ► THE FOUNDATION Telephone no. ►859-97	7-3	<u> 209</u>	
	Located at ▶ 120 PROSPEROUS PLACE, LEXINGTON, KY ZIP+4 ▶40	1509		
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	N	/A	
Pa	art VII-B Statements Regarding Activities for Which Form 4720 May Be Required	, 7		
	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?		ł	
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person? Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(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)?		İ	
	(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.)			
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			
	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here			
C	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected			
	before the first day of the tax year beginning in 2009?	1c		<u>X</u>
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)):			
а	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?		ļ	
	If "Yes," list the years , , , , , , , , , , , , , , , , , , ,			
Þ	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect			
	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A	26		
	·	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.			
2.	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
3 a	during the year?			
	of "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after			
J	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	3ь		
42	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
	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_		Х
		m 990	-PF	2009)

orm 990-PF (2009) DON JACOBS CHARITABLE FO	OUNDATION, INC		<u>35-23739</u>	<u>32 </u>	Page 6
Part VII-B Statements Regarding Activities for Which	Form 4720 May Be F	Required (contin	ued)		
5a During the year did the foundation pay or incur any amount to:					
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	n 4945(e))?	Y6	es X No		
(2) Influence the outcome of any specific public election (see section 4955);	or to carry on, directly or indire				
any voter registration drive?			es X No		
(3) Provide a grant to an individual for travel, study, or other similar purposes	57	Y6	es X No		1
(4) Provide a grant to an organization other than a charitable, etc., organization	on described in section				
509(a)(1), (2), or (3), or section 4940(d)(2)?		Y6	es X No		
(5) Provide for any purpose other than religious, charitable, scientific, literary	, or educational purposes, or f				
the prevention of cruelty to children or animals?		Ye	es 🗓 No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify un	der the exceptions described i	ın Regulations		ŀ	1
section 53.4945 or in a current notice regarding disaster assistance (see instru	uctions)?		N/A	5b	
Organizations relying on a current notice regarding disaster assistance check to	here		▶□		
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption (from the tax because it mainta	ined			
expenditure responsibility for the grant?	N	I/A 🗀 Ye	es 🔲 No		ł
If "Yes," attach the statement required by Regulations section 53 494	5-5(d)				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on				
a personal benefit contract?		Ye	es 🗶 No	- 1	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a	personal benefit contract?			6b	X
If "Yes" to 6b, file Form 8870.					
7a At any time during the tax year, was the foundation a party to a prohibited tax :	shelter transaction?	Ye	es 🗶 No 📙		
b If yes, did the foundation receive any proceeds or have any net income attribut	table to the transaction?		N/A	7b	
Part VIII Information About Officers, Directors, Trust Paid Employees, and Contractors	tees, Foundation Ma	nagers, Highly	y		
List all officers, directors, trustees, foundation managers and their	compensation.		-		
	(b) Title, and average	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e)	Expense unt, other
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	and deferred compensation	allo	wances
OON L. JACOBS, SR	PRESIDENT, DI	RECTOR			
L20 PROSPEROUS PLACE				1	
LEXINGTON, KY 40509	1.00	0.	0.		0.
CATHY JACOBS	DIRECTOR			1	
20 PROSPEROUS PLACE				1	
LEXINGTON, KY 40509	0.50	0.	0.		0.
KAREN L. WEST	TREASURER, DI	RECTOR		ŀ	
20 PROSPEROUS PLACE				ł	
EXINGTON, KY 40509	1.00	0.	0.	<u> </u>	0.
	1				
	1				
	<u> </u>			<u> </u>	
Compensation of five highest-paid employees (other than those inc	T	enter "NONE."	(d) Contributions to	(-) [Evnanca
(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	accou allo	expense unt, other wances
NONE					
	1				
	1				
			 	<u> </u>	
·	1				
				ļ	
	4				
	<u></u>	<u> </u>	l	<u> </u>	
otal number of other employees paid over \$50,000					0

Form **990-PF** (2009)

Form 990-PF (2009) DON JACOBS CHARITABLE FOUNDATION,	INC. 35-	-2373932 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)	n Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter "N	IONE."	
(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		> (
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical number of organizations and other beneficiaries served, conferences convened, research papers produce	information such as the ed, etc.	Expenses
1 N/A		
2		_
3		
4		
Part IX-B Summary of Program-Related Investments	o 1 and 0	Amount
Describe the two largest program-related investments made by the foundation during the tax year on line	S I aliu Z.	Amount
1 <u>N/A</u>		
2		
All other program-related investments. See instructions. 3		
		-
Total. Add lines 1 through 3	<u> </u>	0

Form **990-PF** (2009)

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations, se	e instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	0.
ь	Average of monthly cash balances	1b	145,833.
	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	145,833.
е	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	145,833.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	2,187.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	143,646.
6	Minimum investment return Enter 5% of line 5 ADJUSTED FOR SHORT TAX PERIOD	6	216.
Р	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here and do not complete this part.)	nd certain	-
1	Minimum investment return from Part X, line 6	1	216.
	Tax on investment income for 2009 from Part VI, line 5		
ь	Income tax for 2009 (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	216.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	216.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	216.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	0.
þ	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
а	Suitability test (prior IRS approval required)	3a	·-··
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	0.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	0.
	Note. The amount on line 6 will be used in Part V. column (b) in subsequent years when calculating whether the foundation (nualifies for th	ne section

Form **990-PF** (2009)

4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

				г
	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI,		•		22.5
line 7				216.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years:				
		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from				
Part XII, line 4: ► \$				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior				
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus				
(Election required - see instructions)	0.			
d Applied to 2009 distributable amount				0.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount	0.			0.
6 Enter the net total of each column as				
indicated below				
a Corpus Add lines 31 4c and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract				
line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable	· · · · · · · · · · · · · · · · · · ·			
amount - see instructions		0.		
e Undistributed income for 2008. Subtract line				
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2010				216.
7 Amounts treated as distributions out of	· · · · · · · · · · · · · · · · · · ·			
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004				
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010	<u> </u>		_	
Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9			-	
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				
£ LACESS ITUITI 2005			 	

	OBS CHARITA			35-23	73932 Page 10
	 		A, question 9)	N/A	
1 a If the foundation has received a ruling o					
foundation, and the ruling is effective fo	<u>.</u>	-	. ▶ └┌──		
b Check box to indicate whether the found		ig foundation described i		4942(j)(3) or 49	42(j)(5)
2 a Enter the lesser of the adjusted net	Tax year	/b) 2000	Prior 3 years	(4) 2006	(a) Tatal
income from Part I or the minimum	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
investment return from Part X for					
each year listed					
b 85% of line 2a					
 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 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 Info	rmation (Comple	te this part only	if the foundation	had \$5,000 or mo	ore in assets
at any time during t	he year-see the i	instructions.)			
1 Information Regarding Foundation	n Managers:				
a List any managers of the foundation wh year (but only if they have contributed n			ributions received by the	foundation before the clos	se of any tax
DON L. JACOBS, SR					
b List any managers of the foundation who other entity) of which the foundation ha			or an equally large porti	on of the ownership of a pa	artnership or
NONE					
2 Information Regarding Contribute Check here ► X if the foundation of				not accept unsolicited requ	ests for funds. If
the foundation makes gifts, grants, etc.	(see instructions) to indiv	riduals or organizations u	nder other conditions, co	omplete items 2a, b, c, and	d.
a The name, address, and telephone num	ber of the person to whor	n applications should be	addressed:		
b The form in which applications should b	e submitted and informat	tion and materials they sh	ould include:		
c Any submission deadlines:					
d Any restrictions or limitations on awards	s, such as by geographica	al areas, charitable fields,	kinds of institutions, or o	other factors:	

3 Grants and Contributions Paid During the Ye	ar or Approved for Future I	Payment		
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient	Contribution	
Name and address (home or business) a Paid during the year NONE	or substantial contributor	recipient		
Total			<u>▶ 3a</u>	0.
NONE Total			▶ 3b	0.

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

nter gross amounts unless otherwise indicated.	Unrelated	business income		ded by section 512, 513, or 514	(e)
	(a) Business	(b) Amount	(C) Exclu- sion	(d) Amount	Related or exempt function income
1 Program service revenue:	code	Amount	code	Amount	Tunction income
a	- -		-		
b	I		 		
	1 3				
d			+		
e	-	_ 			
g Fees and contracts from government agencies	_				
Membership dues and assessments					
Interest on savings and temporary cash					· · · · · · · · · · · · · · · · · · ·
investments					
Dividends and interest from securities			 		
Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property		-,			-
Net rental income or (loss) from personal					
property					
Other investment income			1		
Gain or (loss) from sales of assets other					
than inventory			1		
Net income or (loss) from special events		- <u>-</u> -			
Gross profit or (loss) from sales of inventory		_ .			
Other revenue					
a					
b					
C					
d			1		
e	_		<u> </u>		
Subtotal. Add columns (b), (d), and (e)		0.		0.	
Total Add line 12, columns (b), (d), and (e)				13	0
ee worksheet in line 13 instructions to verify calculations.)	-			
Part XVI-B Relationship of Activities	s to the Accor	nplishment of Ex	kemp	t Purposes	
• • • • • • • • • • • • • • • • • • • •		ashima (a) of Dark VVII A			and a home and a f
ine No. Explain below how each activity for which in the foundation's exempt purposes (other the			A COULUE	outed importantly to the accord	ipiisnment oi
the foundation's exempt purposes (other th	an by providing fund	3 101 30011 purposes j.			
	~-				
				·	
					<u> </u>
		· · · · · ·			- · · · · · · · · · · · · · · · · · · ·
		•			**************************************
	······································			<u> </u>	
		· · · · · · · · · · · · · · · · · ·			
	 ; .				

	rm 990-PF (2009) Part XVII I				E FOUNDATION and Transactions a		35-237. Onships With Noncha			ge 13
		<u>-</u>	ganizations					т	V	NI.
1	-	_		-	ng with any other organization 27, relating to political organ		section 501(c) of		Yes	NO
,				ncharitable exempt or		iizaliulis*				
•	(1) Cash	i the reporting i	ioundation to a nor	icharitable exempt of	gainzation of.			1a(1)		Х
	(2) Other asse	ets	-		•			1a(2)	\neg	X
1	b Other transacti	=			•					
	(1) Sales of a	ssets to a nonc	haritable exempt o	rganization				15(1)		Х
(2) Purchases of assets from a noncharitable exempt organization							1b(2)		X	
	(3) Rental of f	facilities, equipi	ment, or other asse	ets				1b(3)		_X
	(4) Reimburse	ement arranger	ments	•				1b(4)	ļ	X
	(5) Loans or I	-						1b(5)	ļ	X
			-	fundraising solicitation				1b(6)		X
	ŭ			ner assets, or paid em	• •		four market value of the goods .	1c		_X
1		-		-	• •		fair market value of the goods, on ction or sharing arrangement, s		seis,	
	•		-	or services received.		ie ili aliy ilalisa	ction of Sharing arrangement, s	HUW III		
(a		Amount involve			e exempt organization	(d) Descr	iption of transfers, transactions, and	sharing ar	тапдете	ents
.	,			N/A			<u></u>			
		•								
			~							
		·					· · · · · · · · · · · · · · · · · · ·			
2		•	-		or more tax-exempt organi	zations describ	ed			_
				1 501(c)(3)) or in sec	tion 527?		L_	Yes	[X	No
_	b If Yes, comple		g schedule. of organization		(b) Type of organization	1	(c) Description of relations			
			/A		(b) Type of organization		(c) Description of relations	пр		
		14 /	/ A							
	· · · · · · · · · · · · · · · · · · ·		-							
		$\overline{\gamma}$	7							
	Under penalties of	perjury, I declare	that I have examined t	this return, including acco	ompanying schedules and statem all information of which preparer	nents, and to the b	est of my knowledge and belief, it is	true, corre	ect,	
	and complete Dec	claration of propar	er totner than taxpayer	of oduciary) is grased on	all information of which preparer	nas any knowled	ge \			
a,	I M	911/	KUO (<u> 7/\o/\o</u>		resident			
Sign Here	Signature o	of officer or true	stee		Date	Title	Charlet D	ula jaloni	hung nor	nhar.
g	Prepare		la les	Dean		3/6/10	self-	r's identif	iyiriy nun	iner
ภ	l ≥ ₹O		EAN CODE	N FORD DO	ı'C	/ =// =	employed >			
	G G Firm s name	Firm s name (or yours DEAN DORTON FORD PSC I self-employed) 106 W. VINE STREET, SUITE 600					EIN ►			
	addiess an		EXINGTON,				Phone no. (859) 255	5-23	41
					<u> </u>		,			

(859)255-2341 Form **990-PF** (2009)

Schedule B (Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Schedule of Contributors

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

OMB No. 1545-0047

2009

Employer identification number Name of the organization DON JACOBS CHARITABLE FOUNDATION, 35-2373932 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 X 501(c)(3) exempt private foundation 4947(a)(1) nonexempt chantable 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** X 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 J For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 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),

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

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

Name of organization

Employer identification number

DON JACOBS CHARITABLE FOUNDATION, INC.

35-2373932

Part I	Contributors (see instructions)		
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	DON L. JACOBS SR 2396 GULFSHORE BLVD N #1 NAPLES, FL 34103	\$ 3,500,000.	Person X Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroli Noncash (Complete Part II if there is a noncash contribution)

FORM 990-PF	LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10	STATEMENT	1
NAME OF CONTRIBUTOR	ADDRESS		
DON L. JACOBS, SR.	2396 GULFSHORE BLVD N #1 NAPLES, FL 34103		