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Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation**
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

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

OMB No 1545-0052

2009

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 D.J. ANGUS-SCIENTECH EDUCATIONAL FOUNDATION, INC.		A Employer identification number 35-606511
	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)
	8036 HEYWARD DRIVE		317-577-5988
City or town, state, and ZIP code INDIANAPOLIS, IN 46250-4225		C If exemption application is pending, 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		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,663,581		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	

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)	19,950			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	18	18	18	
	4 Dividends and interest from securities	52,920	52,920	52,920	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		21,556		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	72,888	74,494	52,938		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	2,400			2,400
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	3,897			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	716			716
	24 Total operating and administrative expenses. Add lines 13 through 23	7,013	-0-	-0-	3,116
	25 Contributions, gifts, grants paid	83,679			83,679
26 Total expenses and disbursements. Add lines 24 and 25	90,692	-0-	-0-	86,795	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	<17,804>				
b Net investment income (if negative, enter -0-)		74,494			
c Adjusted net income (if negative, enter -0-)			52,938		

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Cat No 11289X

Form 990-PF (2009)

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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	2,214	4,780	4,780
	2	Savings and temporary cash investments	73,684	52,547	52,547
	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			
	10a	Investments—U.S. and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	12,140	12,140	67,849
	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) MUTUAL FUNDS	1,450,900	1,473,222	1,478,405
	14	Land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	1,538,938	1,542,689	1,603,581
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)	-0-	-0-	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ 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	1,538,938	1,542,689	
	30	Total net assets or fund balances (see page 17 of the instructions)	1,538,938	1,542,689	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	1,538,938	1,542,689	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,538,938
2	Enter amount from Part I, line 27a	2	<17,804>
3	Other increases not included in line 2 (itemize) ▶ CAPITAL GAIN FROM PART IV	3	21,556
4	Add lines 1, 2, and 3	4	1,542,690
5	Decreases not included in line 2 (itemize) ▶ ROUNDING	5	1
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,542,689

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				
b	SEE ATTACHED			
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	N/A		
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b	N/A	N/A	
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	21,556
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	151,001	1,736,095	.087
2007	150,105	2,177,591	.069
2006	141,410	2,037,713	.069
2005	147,488	1,951,585	.076
2004	138,408	1,921,011	.072

2 Total of line 1, column (d)	2	.373
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	.075
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,376,921
5 Multiply line 4 by line 3	5	103,269
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	745
7 Add lines 5 and 6	7	104,014
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	86,795

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	1,490	
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	-0-	
3	Add lines 1 and 2	3	1,490	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	-0-	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	1,490	
6	Credits/Payments:			
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	2,000	
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d	7	2,000	
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	510	
11	Enter the amount of line 10 to be: Credited to 2010 estimated tax Refunded	11	-0-	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?		X
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ -0- (2) On foundation managers. ▶ \$ -0-		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ -0-		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?		X
If "Yes," attach a detailed description of the activities		
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		X
If "Yes," attach the statement required by General Instruction T.		
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ INDIANA		
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

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)	N/A	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 ▶ C. D. YATES	Telephone no. ▶ 317-577-5988			
	Located at ▶ 8036 HENWARD DRIVE, INDIANAPOLIS, IN	ZIP+4 ▶ 46250-4225			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here.	N/A	▶ ☐		
	and enter the amount of tax-exempt interest received or accrued during the year	15	N/A		

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b	N/A
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	
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 ▶ 20____, 20____, 20____, 20____ N/A		
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	N/A
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____ N/A		
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	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

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

- 5a** During the year did the foundation pay or incur any amount to:
- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (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** N/A
- Organizations relying on a current notice regarding disaster assistance check here N/A ☐
- c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No
- If "Yes," attach the statement required by Regulations section 53.4945–5(d).
- 6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No
- b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** X
- If "Yes" to 6b, file Form 8870.
- 7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No
- b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **7b** N/A

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
<u>LIST ATTACHED</u>	<u>ALL</u>	<u>-0-</u>	<u>-0-</u>	<u>-0-</u>
<u>ALL VOLUNTEERS</u>	<u>AS NEEDED</u>			

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
<u>NONE</u>				

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

N/A

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

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

N/A

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 REGIONAL SCIENCE FAIR - INDIANAPOLIS, INDIANA - SPONSOR SCIENCE FAIR HELD AT THE UNIVERSITY OF INDIANAPOLIS TO RECOGNIZE ACHIEVEMENTS BY ELEMENTARY AND HIGH SCHOOL STUDENTS	\$22,579
2 GRAND VALLEY STATE UNIVERSITY - ALLEMDALE, MICHIGAN - SPONSOR RESEARCH VESSEL TO TEACH STUDENTS ABOUT SCIENTIFIC MATTERS RELATED TO WATER. FUND INTERNS IN WATER RESEARCH INSTITUTE	18,000
3 INDIANA UNIVERSITY FOUNDATION - BLOOMINGTON, INDIANA - FUND COMPUTER SCIENCE WORKSHOP AND SUMMER PHYSICS RESEARCH PROGRAMS AND AWARDS.	14,400
4 MOST IMPROVED STUDENT AWARDS - VARIOUS INDIANA COLLEGES - CASH AWARDS TO STUDENTS WHO HAVE IMPROVED ACADEMIC STANDING TO RECOGNIZE AND ENCOURAGE ACHIEVEMENT	10,400

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	N/A

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

3	N/A
---	-----

Total. Add lines 1 through 3

N/A

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	1,335,703
b	Average of monthly cash balances	1b	62,186
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	1,397,889
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	1,397,889
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	20,968
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,376,921
6	Minimum investment return. Enter 5% of line 5	6	68,846

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	68,846
2a	Tax on investment income for 2009 from Part VI, line 5	2a	1,490
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	-0-
c	Add lines 2a and 2b	2c	1,490
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	67,356
4	Recoveries of amounts treated as qualifying distributions	4	-0-
5	Add lines 3 and 4	5	67,356
6	Deduction from distributable amount (see page 25 of the instructions)	6	-0-
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	67,356

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	86,795
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	86,795
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	-0-
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	86,795

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				67,356
2 Undistributed income, if any, as of the end of 2009:				
a Enter amount for 2008 only			-0-	
b Total for prior years: 20____, 20____, 20____		-0-		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				42,436
d From 2007				44,292
e From 2008				66,414
f Total of lines 3a through e	153,142			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$ <u>86,795</u>				
a Applied to 2008, but not more than line 2a			-0-	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		-0-		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)	-0-			
d Applied to 2009 distributable amount				67,356
e Remaining amount distributed out of corpus	19,439			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	-0-			-0-
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	172,581			
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 page 27 of the instructions		-0-		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions			-0-	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed 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)	-0-			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	-0-			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	172,581			
10 Analysis of line 9:				
a Excess from 2005				-0-
b Excess from 2006				42,436
c Excess from 2007				44,292
d Excess from 2008				66,414
e Excess from 2009				19,439

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

N/A

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	
85% of line 2a				
Qualifying distributions from Part XII, line 4 for each year listed				
Amounts included in line 2c not used directly for active conduct of exempt activities				
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).)

NONE

- b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see 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:

N/A

- c** Any submission deadlines:

N/A

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

N/A

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					
LIST ATTACHED					
Total					3a 83,679
b Approved for future payment					
NONE					
Total					3b N/A

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

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions.)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue:					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities					
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory					
9	Net income or (loss) from special events . . .					
10	Gross profit or (loss) from sales of inventory . .					
11	Other revenue: a					
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)					
13	Total. Add line 12, columns (b), (d), and (e)					

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

13 N/A

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

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

(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.	
Signature of officer or trustee  C.D. YATES	Date 11-13-10
Title EXECUTIVE SECRETARY	Title DIRECTOR

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Page 1, Part I, Line 23, Other Expenses:

Bank Fees	\$ 89.84
Insurance	564.04
Safety Deposit Box	<u>62.00</u>
	<u>715.88</u>

Page 1, Part I, Line 18, Taxes:

Excise Tax	<u>\$3,897.37</u>
	<u>\$3,897.33</u>

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8036 Heyward Drive, Indianapolis, Indiana 46250-4225
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Page 1, Part I, Line 1, Contributions and Gifts Received:

Contributor	Date	Amount
Anonymous Raymond James Global Account	12/18/09	200.00
Bakken, J. Darrell	12/23/09	50.00
Bilgram, Wilhelm	12/09/09	50.00
Bobbitt, Jesse and Carolynne	12/21/09	500.00
Brown, H.X.	12/07/09	50.00
Brueckmann, F. Robert	12/30/09	200.00
Chiplis, Robert H. and Geneva	12/28/09	50.00
Cockerill, Edward M.	12/08/09	50.00
Colyer, Robert A.	12/29/09	50.00
Craddock, James B.	12/07/09	50.00
Crooks, H. Nelson	02/28/09	100.00
Crooks, H. Nelson	12/12/09	50.00
Cunningham, George and Donna	12/27/09	3,000.00
Cuppy, Lynn and B. Milton	12/08/09	100.00
Davis, John and Marian	12/17/09	100.00
Dick, William H.	10/11/09	\$100.00
Doyle, Gertrude	12/09/09	100.00
Doyle, Gertrude, Phillip W. Doyle or L. Edward Doyle	04/07/09	50.00
Elliott, William	12/19/09	100.00
Flower, H. Lee and Jane	12/12/09	50.00
Forrester, Ernest	12/10/09	25.00
Galerman, Raphael	12/09/09	10.00
Galerman, Raphael and McGinnis, Sarah	12/12/09	50.00
Gish, Gordon	12/30/09	500.00
Grayson, Ted and Rosanna	12/23/09	100.00
Hartsock, James L.	12/11/09	10.00
Hume, Charles and Rosemary	12/09/09	25.00
Israelov, Rhoda	12/09/09	20.00
Jennings, Ronald R.	12/09/09	30.00
Johnson, Earl	12/19/09	25.00
Jones, John P.	12/15/09	20.00
Jones, Joseph A.	12/18/09	250.00
Kahn, David and Joan	12/09/09	50.00
Kempinger, Kathleen	12/9/09	100.00
Kurlander, Gerald	12/07/09	300.00
Lawrence, James M.	12/7/09	50.00

Lewellen, Perry and Anita	12/14/09	100.00
Lewis, Robert W.	12/9/09	15.00
Long, Malcolm and Wilma	12/12/09	250.00
Lowes, James M.	12/8/09	50.00
Lubbers, Arend and Nancy	12/31/09	50.00
Lunsford, Thomas E.	12/07/09	50.00
Mallette, Joyce	12/22/09	100.00
Mannfeld, Robert Rev. Trust	12/15/09	100.00
McCauley, Charles F.	12/8/09	100.00
McDaniel, Gaye	12/15/09	25.00
McDougal, Robert A.	12/08/09	100.00
McLear, Paul and Barbara	12/14/09	100.00
Morrical, John K.	12/13/09	100.00
Nation, Robert D.	12/18/09	35.00
Nezovich, Stephen	12/07/09	200.00
Nitka, Edward and Linda	12/23/09	120.00
Olsen, Robert	12/16/09	50.00
Pantzer, Jr., John and Anne	12/09/09	50.00
Paul, C. Steve	12/15/09	25.00
Peer, John C.	12/08/09	10.00
Pfeiffer, William	12/18/09	100.00
Pickett, Robert	12/09/09	50.00
Pittman, Euna and John	12/17/09	25.00
Prentice, John	12/16/09	100.00
Pugh, Newell	12/18/09	50.00
R.B. Annis Educational Foundation	12/10/09	2,500.00
Rathman, John	12/20/09	25.00
Ridley, Elton	12/30/09	300.00
Robinson, Robert D.	12/14/09	100.00
Rogers, M.D., Robert E.	12/08/09	25.00
Ruddell Trust Fund	12/07/09	1,000.00
Schmidt, Alan D.	12/13/09	40.00
Sherlow, Douglas K.	12/22/09	10.00
Shoup, Jr., Charles D.	12/14/09	100.00
Siderys, Dr. Harry	12/08/09	100.00
Sorensen, Robert S.	12/15/09	100.00
Springer, Steven and Judith	12/26/09	200.00
Stanley, William E.	12/13/09	40.00
Steinman, Alan	12/18/09	50.00
Stimmetz, Robert	12/30/09	50.00
Stogsdill, Willis	12/13/09	25.00
Storer, Barbara	12/12/09	500.00
Stump, Thomas A.	12/08/09	100.00
The Sciencetech Club-Dee Slater Memorial	04/07/09	500.00

The Sciencetech Club-donation	04/07/09	5,000.00
Tyler, R. Donald	12/29/09	75.00
Upton, Dr. Richard T. & Marjorie T.	02/09/09	100.00
Vos, Paul M.	12/10/09	200.00
Wagner, Douglas and Janice	12/07/09	100.00
Ward, Ronald W.	12/30/09	20.00
Wenning, Virginia	12/09/09	20.00
Wolfla, Lyman and Patricia	12/16/09	50.00
Yates, Daniel and Diana	12/29/09	100.00
Total		\$19,950.00

2/16/10

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Page 2, Part II, Investments:

	<u>Quantity</u>	<u>Cost</u>	<u>Market Value</u>
Eli Lilly	1,900	12,140.25	67,849.00
Total Stocks		12,140.25	67,849.00
Federated Strategic Inc. Fd F	3,566.346	34,323.40	30,991.54
Franklin Income Fund Class A	247,388.297	523,643.81	512,093.77
Franklin Growth Fund Class A	4,690.949	121,429.05	183,040.82
Franklin Rising Dividends Fund	4,365.069	112,225.16	121,829.07
Franklin Value	1,819.434	103,754.99	77,708.02
Mutual Series Shares Class A	4,240.695	76,891.66	80,827.64
Templeton Foreign Fund Class A	8,585.792	77,463.14	56,236.93
Templeton Growth Fund Class A	11,378.503	199,426.77	191,272.63
Franklin U.S. Government Class A	16,053.512	144,000.00	144,160.53
Mutual Service Global Discovery	3,003.162	80,064.30	80,244.48
Total Mutual Funds		1,473,222.28	1,478,405.43
Checking/Savings Accounts/Cash		52,546.76	52,546.76
Total Cash Accounts		52,546.76	52,546.76
Total Investments		1,537,909.29	1,598,801.14

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PART IV CAPITAL GAINS AND LOSSES, PAGE 3:

(a) Description	(b) How Acquired	(c) Date Acquired	(d) Date Sold	(e) Gross Sales Price	(g) Costs/ Expenses	(h) and (l) Gain/ <Loss>
1,217.575 Shares Franklin Growth Fund	P	Various	10-15-09	\$ 46,000	\$ 28,451	\$17,549
3,185.841 Shares Templeton Growth Fund	P	All	10-16-09	54,000	55,838	<1,838>
1,607.600 Shares Franklin Managed Trust Rising	P	Over	10-16-09	44,000	41,331	2,669
4,240.694 Mutual Series Class A Distribution	P	Year	10-15-09	<u>80,064</u>	<u>76,888</u>	<u>3,176</u>
				<u>\$224,064</u>	<u>\$202,508</u>	<u>\$21,556</u>

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Page 6, Part VIII, Officers and Directors:

Mrs. Elmira F. Annis	3265 East Tulip Drive, Indianapolis, Indiana 46227-7723
Dr. F. Robert Brueckmann	3202 S. 975E, Zionsville, Indiana 46077-8915
Dr. H. Nelson Crooks	5449 Potters Pike, Indianapolis, Indiana 46234-2940
Mr. George J. Cunningham	7940 East 126 th Street, Fishers, Indiana 46038
Mr. Charles E. Kleis	6516 Finchley Road, Indianapolis, Indiana 46250-2868
Mr. Richard Judkins	1504 Oakwood Trail, Indianapolis, Indiana 46260-4075
Dr. Malcolm D. Long	4431 Lakeridge Drive, Indianapolis, Indiana 46234-9542
Dr. Robert S. Sorenson	1500 Northwestern Avenue, West Lafayette, Indiana 47906
Mr. Steven E. Springer	8252 North Bowline Court, Indianapolis, Indiana 46236
Mr. R. Donald Tyler	5354 West 62 nd Street, Apt. 241, Indianapolis, Indiana 46268
Mr. Paul M. Vos	1054 Hampton Court, Indianapolis, Indiana 46260
Mr. Douglas A. Wagner	5245 Kathcart Way, Indianapolis, Indiana 46254
Mr. James R. Wark	5814 Kilmer Lane, Indianapolis, Indiana 46250
Mr. Victor H. Wenning	10701 East 121 st Street, Fishers, Indiana 46037-9697
Mr. Harold J. Wesselman	6925 Dover Road, Indianapolis, Indiana 46220-3821
Mr. Lyman Wolfla	1308 South Peace Street, Greenfield, Indiana 46140
Mr. C. Daniel Yates	8036 Heyward Drive, Indianapolis, Indiana 46250

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D. J. ANGUS-SCIENTECH EDUCATIONAL FOUNDATION, INC.
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Page 11, Part XV, Line 3(a):

Grants and Contributions Paid Out

Year Ended December 31, 2009

Grand Valley State University
Allendale, Michigan 46417

\$18,000.00⁽¹⁾

Regional Science Fair:

Site, Student Awards/Supplies	\$11,987.64
University of Indianapolis	
1400 East Hanna Avenue	
Indianapolis, Indiana 46227	
Winners Trip	7,391.01
For students residing in the	
Indianapolis, Indiana area who	
participated in the Regional	
Science Fair	
Teacher Awards	<u>3,200.00</u>
For the teachers of the Science Fair	
winners	

Total Regional Science Fair Support:	22,578.65 ⁽²⁾
--------------------------------------	--------------------------

Most Improved Student Awards:

Butler University	\$ 750.00
4600 Sunset Avenue	
Indianapolis, Indiana 46208	
Earlham College	500.00
Richmond, Indiana 47374	
University of Indianapolis	1,000.00
1400 East Hanna Avenue	
Indianapolis, Indiana 46227	
IUPUI-Engineering	500.00
799 West Michigan Street	
Indianapolis, Indiana 46202	
IUPUI-Physics	150.00
799 West Michigan Street	
Indianapolis, Indiana 46202	
Tri-State College	500.00
Angola, Indiana 46703	
Marian College	500.00
3200 Cold Springs Road	
Indianapolis, Indiana 46222	
Franklin College	500.00
Franklin, Indiana 46131	

Rose Hulman College Terre Haute, Indiana 47803	1,000.00	
Huntington College Huntington, Indiana	500.00	
Taylor University Upland, Indiana	750.00	
Valparaiso University Valparaiso, Indiana	500.00	
University of Southern Indiana Evansville, Indiana	1,000.00	
Wabash College Crawfordsville, Indiana 47933	1,000.00	
DePauw University Greencastle, Indiana 46135	750.00	
Anderson University Anderson, Indiana 46011	<u>500.00</u>	
Total Most Improved Student Awards		10,400.00 ⁽³⁾
School Science Programs Indianapolis, Indiana		1,500.00 ⁽⁴⁾
Indiana University Foundation Bloomington, Indiana		14,400.00 ⁽⁵⁾
Rose Hulman College Terre Haute, Indiana		4,000.00 ⁽⁶⁾
Purdue University Foundation West Lafayette, Indiana		7,200.00 ⁽⁷⁾
Wabash College Crawfordsville, Indiana		3,200.00 ⁽⁸⁾
Boy Scouts of America and Girl Scouts of America Indianapolis, Indiana		1,600.00 ⁽⁹⁾
Eagle Creek Park Foundation Indianapolis, Indiana		<u>800.00</u> ⁽¹⁰⁾
Total Grants and Contributions Paid Out:		<u>\$83,678.65</u>

(1) \$18,000.00 – Research Vessel D.J. Angus – Provide support for research vessel owned by Grand Valley State University, Allendale, Michigan, to teach students about scientific matters related to water; Intern Program in the R. B. Annis Water Resources Institute at Grand Valley State University, Dr. Ronald Ward Scholarship Award.

(2) \$22,578.65 – Regional Science Fair support, Indianapolis, Indiana – Recipients are science fair students and their teachers per IRS approved procedure. Purposes are to recognize scientific achievement by elementary, middle and high school students by awarding certificates, books, computers, calculators, luncheons and science trips

- (3) \$10,400.00 – Most Improved Student Awards Program – Recipients are students of the twenty-three Indiana colleges and universities set forth per IRS approved procedure. Purpose is to provide books, supplies or awards to incent students who have improved their academic performance to continue to improve their academic standing.
- (4) \$1,500.00 – School Science Programs – Recipients are science teachers of Indianapolis, Indiana area elementary, middle and high schools who implement a new science program at their respective schools.
- (5) \$14,400.00 – To fund the computer science workshop, summer physics research and scholarship awards, all funded through the Indiana University Foundation, Bloomington, Indiana.
- (6) \$4,000.00 – Creation of a scholarship fund in honor of Robert E. Bettcher for students attending Rose Hulman College, Terre Haute, Indiana.
- (7) \$7,200.00 – To fund programs and scholarships for the top prospective engineering student at Purdue University, West Lafayette, Indiana, through the Purdue University Foundation.
- (8) 3,200.00 – To fund Opportunities to Learn About Business (“OLAB”) Program held at Wabash College, Crawfordsville, Indiana, to teach high school students about business enterprises.
- (9) \$1,600.00 – To fund projects sponsored by the Boy Scouts of America and the Girl Scouts of America in the Indianapolis, Indiana area.
- (10) \$800.00 – To fund projects at Eagle Creek Park, Indianapolis, Indiana.

All grants and contributions are in the educational category, and no recipients is related to any disqualified person