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# Return of Private Foundation

## or Section 4947(a)(1) Nonexempt Charitable Trust

### Treated as a Private Foundation

2009

Department of the Treasury  
Internal Revenue Service

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

For calendar year 2009, or tax year beginning

, and ending

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeUse the IRS  
label.  
Otherwise,  
print  
or type.  
See Specific  
Instructions.

Name of foundation

SEEDGE PLITT CHARITABLE TRUST III

Number and street (or P O box number if mail is not delivered to street address)

Room/suite

C/O HOWARD STONE, ONE SOUTH WACKER DR.

800

City or town, state, and ZIP code

CHICAGO, IL 60606

A Employer identification number

35-6739620

B Telephone number

(312) 634-3400

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐H Check type of organization: ☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16)

\$ 6,893,042.

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).)

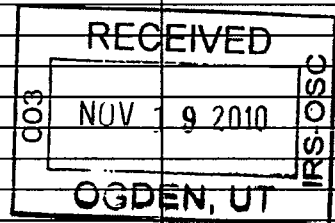
(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

Revenue	1 Contributions, gifts, grants, etc., received	326,031.		N/A	
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	181,476.	164,729.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	20,975.			
	b Gross sales price for all assets on line 6a	2,577,073.			
	7 Capital gain net income (from Part IV, line 2)		20,975.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income	-7,527.	-7,527.		STATEMENT 2
	12 Total. Add lines 1 through 11	520,955.	178,177.		
	13 Compensation of officers, directors, trustees, etc	48,600.	12,150.		36,450.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 3	27,989.	0.		27,989.
	c Other professional fees STMT 4	51,486.	51,486.		0.
	17 Interest				
	18 Taxes STMT 5	1,502.	1,454.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	186.	0.		186.
	22 Printing and publications				
	23 Other expenses STMT 6	21,734.	5,821.		15,878.
	24 Total operating and administrative expenses. Add lines 13 through 23	151,497.	70,911.		80,503.
	25 Contributions, gifts, grants paid	455,834.			455,834.
	26 Total expenses and disbursements. Add lines 24 and 25	607,331.	70,911.		536,337.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-86,376.			
	b Net investment income (if negative, enter -0-)		107,266.		
	c Adjusted net income (if negative, enter -0-)			N/A	



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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing		4,404.		
	2	Savings and temporary cash investments		843,870.	444,462.	444,462.
	3	Accounts receivable ▶		3,211.		
		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				
	7	Other notes and loans receivable ▶				
		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 STMT 8		795,810.	761,331.	795,824.
	b	Investments - corporate stock STMT 9		1,844,727.	2,318,568.	2,818,659.
	c	Investments - corporate bonds STMT 10		2,830,622.	2,745,855.	2,834,097.
11	Investments - land, buildings, and equipment basis ▶					
	Less: accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other					
14	Land, buildings, and equipment: basis ▶					
	Less: accumulated depreciation ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers)		6,322,644.	6,270,216.	6,893,042.	
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				
	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 <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds		5,038,411.	5,038,411.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
	29	Retained earnings, accumulated income, endowment, or other funds		1,284,233.	1,231,805.	
30	Total net assets or fund balances		6,322,644.	6,270,216.		
31	Total liabilities and net assets/fund balances		6,322,644.	6,270,216.		

## 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	6,322,644.
2	Enter amount from Part I, line 27a	2	-86,376.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 7	3	33,948.
4	Add lines 1, 2, and 3	4	6,270,216.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	6,270,216.

**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 ATTACHED SHORT TERM SCHEDULE	P	VARIOUS	VARIOUS
b SEE ATTACHED LONG TERM SCHEDULE	P	VARIOUS	VARIOUS
c SPDR GOLD TR SHS - CASH IN LIEU	P	VARIOUS	VARIOUS
d CAPITAL GAINS DIVIDENDS			
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 600,000.		599,325.	675.
b 1,975,000.		1,956,773.	18,227.
c 73.			73.
d 2,000.			2,000.
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			675.
b			18,227.
c			73.
d			2,000.
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	20,975.
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). If (loss), enter -0- in Part I, line 8	{ }	3	N/A

**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 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	406,800.	6,718,746.	.060547
2007	105,948.	5,998,874.	.017661
2006	329,343.	5,580,058.	.059021
2005	313,085.	5,553,043.	.056381
2004	89,660.	5,350,651.	.016757

2 Total of line 1, column (d)	2	.210367
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	.042073
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	6,400,116.
5 Multiply line 4 by line 3	5	269,272.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,073.
7 Add lines 5 and 6	7	270,345.
8 Enter qualifying distributions from Part XII, line 4	8	536,337.

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.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	1,073.
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	1,073.
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	1,073.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	1,640.	
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	1,640.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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	567.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input checked="" type="checkbox"/> 567. Refunded <input type="checkbox"/>	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
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
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. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 0.		
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
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 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 instructions) <input checked="" type="checkbox"/> NONE		
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)? 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	

N/A

STMT 12

**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 instructions)	11		X
12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14 The books are in care of ► HOWARD STONE Telephone no. ► (312) 634-3400			
Located at ► ONE SOUTH WACKER DRIVE, SUITE 800, CHICAGO, IL ZIP+4 ► 60606			
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <input type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here N/A <input type="checkbox"/>	1b	
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 instructions.) N/A	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	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)? ☐ 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 ☒ Nob 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 instructions)? ☐ Yes ☒ NoOrganizations 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 ☒ Nob Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ Nob If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(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
HOWARD STONE ONE SOUTH WACKER DRIVE, SUITE 800 CHICAGO, IL 60606	TRUSTEE 9.00	48,600.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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

0

Form 990-PF (2009)





**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see 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	5,997,556.
b	Average of monthly cash balances	1b	500,024.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	6,497,580.
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	6,497,580.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	97,464.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	6,400,116.
6	Minimum investment return. Enter 5% of line 5	6	320,006.

**Part XI Distributable Amount** (see 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	320,006.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	1,073.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,073.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	318,933.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	318,933.
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	318,933.

**Part XII Qualifying Distributions** (see 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	536,337.
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	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	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	536,337.
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	1,073.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	535,264.

**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 instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				318,933.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			203,611.	
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: ► \$ 536,337.				
a Applied to 2008, but not more than line 2a			203,611.	
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				318,933.
e Remaining amount distributed out of corpus	13,793.			
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:	13,793.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
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				0.
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. Subtract lines 7 and 8 from line 6a	13,793.			
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	13,793.			



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

Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)					
a Paid during the year					
SEE STATEMENT 13					
Total				▶ 3a	455,834.
b Approved for future payment					
NONE					
Total				▶ 3b	0.





**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**

Name of the organization

SEGE PLITT CHARITABLE TRUST III

Employer identification number

35-6739620

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 foundationCheck 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 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).

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

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

Name of organization	Employer identification number
SEEDGE PLITT CHARITABLE TRUST III	35-6739620

**Part I Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	HENRY PLITT CHARITABLE TRUST II FBO RAYMOND C. & LUCILLE M. FOX  ONE SOUTH WACKER DRIVE, SUITE 800  CHICAGO, IL 60606	\$ 19,286.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
4	HENRY PLITT CHARITABLE TRUST II FBO RAYMOND C. & LUCILLE M. FOX  ONE SOUTH WACKER DRIVE, SUITE 800  CHICAGO, IL 60606	\$ 243,583.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution)
2	SEEDGE PLITT CHARITABLE TRUST II FBO RAYMOND C. & LUCILLE M. FOX  ONE SOUTH WACKER DRIVE, SUITE 800  CHICAGO, IL 60606	\$ 3,093.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
3	SEEDGE PLITT CHARITABLE TRUST II FBO RAYMOND C. & LUCILLE M. FOX  ONE SOUTH WACKER DRIVE, SUITE 800  CHICAGO, IL 60606	\$ 60,069.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)



Name of organization	Employer identification number
SEEDGE PLITT CHARITABLE TRUST III	35-6739620

**Part II Noncash Property** (see instructions)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
4	SEE ATTACHED SCHEDULE	\$ 243,583.	12/31/09
3	SEE ATTACHED SCHEDULE	\$ 60,069.	12/31/09
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

**Sedge Plitt Charitable Trust III**

EIN: 35-6739620

**Attachment to 990PF, Schedule B****Contributions\* from Henry Plitt Charitable Trust II FBO Raymond C. & Lucille M. Fox****Date of Transfer: 12/31/09**

<b>Description</b>	<b>Shares/Face</b>	<b>FMV</b>
Amcap Fund Inc	3,161.164	52,475
American Mutual Fund Inc, Class A	2,168.167	50,215
Euro Pacific Growth Fund, Class A	814.342	31,222
California St Rev Antic Nts	25,000.000	25,192
Port Oakland CA FGIC Ser-M	25,000.000	26,708
Sonoma Cnty CA Wtr Agcy MBIA	25,000.000	26,531
University CA Revs Multi FGIC	30,000.000	31,240
		<b>243,583</b>

**Contributions\* from Sedge Plitt Charitable Trust II FBO Raymond C. & Lucille M. Fox****Date of Transfer: 12/31/09**

<b>Description</b>	<b>Shares/Face</b>	<b>FMV</b>
Amcap Fund Inc, Class A	541.175	8,984
American Mutual Fund Inc, Class A	398.542	9,230
Euro Pacific Growth Fund, Class A	157.092	6,023
California St Rev Antic Nts	5,000.000	5,038
Long Beach Calif GO Uni Sch	30,000.000	30,794
		<b>60,069</b>

\* The above "contributions" represent distributions of remainder interests from the captioned trusts which were qualified charitable remainder trusts.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
LESS: BOND PREMIUM AMORTIZATION	-4,996.	0.	-4,996.
LESS: BOND PREMIUM AMORTIZATION	-1,343.	0.	-1,343.
LESS: ACCRUED PURCHASE INTEREST	-15,402.	0.	-15,402.
ONEOK PARTNERS - INTEREST	442.	0.	442.
RBC DAIN RAUSCHER - CORP BOND INT	68,431.	0.	68,431.
RBC DAIN RAUSCHER - DIVIDENDS	55,093.	2,000.	53,093.
RBC DAIN RAUSCHER - TAX EXEMPT INT	18,076.	0.	18,076.
RBC DAIN RAUSCHER - TAX EXEMPT INT OID	14.	0.	14.
RBC DAIN RAUSCHER - US TREAS INT	63,145.	0.	63,145.
TC PIPELINES - INTEREST	16.	0.	16.
TOTAL TO FM 990-PF, PART I, LN 4	183,476.	2,000.	181,476.

FORM 990-PF OTHER INCOME STATEMENT 2

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
ROYALTIES - MARINE PETE TRUST UBI	6,392.	6,392.	
TC PIPELINES - BUSINESS INCOME	-3,767.	-3,767.	
TC PIPELINES - SECTION 1231	-52.	-52.	
ONEOK PARTNERS - BUSINESS INCOME	-10,280.	-10,280.	
ONEOK PARTNERS - SECTION 1231	-70.	-70.	
RBC DAIN RAUSCHER - OTHER INCOME	250.	250.	
TOTAL TO FORM 990-PF, PART I, LINE 11	-7,527.	-7,527.	

FORM 990-PF	ACCOUNTING FEES			STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTING FEES	27,989.	0.		27,989.	
TO FORM 990-PF, PG 1, LN 16B	27,989.	0.		27,989.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INVESTMENT MANAGEMENT FEES	51,486.	51,486.		0.	
TO FORM 990-PF, PG 1, LN 16C	51,486.	51,486.		0.	

FORM 990-PF	TAXES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES	1,454.	1,454.		0.	
FEDERAL TAXES	48.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	1,502.	1,454.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INSURANCE	21,142.	5,289.		15,853.	
TC PIPELINES - NONDEDUCTIBLE					
EXPENSES	5.	0.		0.	
ONEOK PARTNERS -					
NONDEDUCTIBLE EXPENSES	30.	0.		0.	
RBC DAIN RAUSCHER - ADR FEES	380.	380.		0.	

SEDGE PLITT CHARITABLE TRUST III

35-6739620

MISCELLANEOUS FEES	152.	152.	0.
FRANCHISE TAX BOARD	25.	0.	25.
TO FORM 990-PF, PG 1, LN 23	21,734.	5,821.	15,878.

FORM 990-PF OTHER INCREASES IN NET ASSETS OR FUND BALANCES STATEMENT 7

DESCRIPTION	AMOUNT
ADJUSTMENT FOR CONTRIBUTION COST VALUE PER BOOKS	3,062.
ONEOK PARTNERS - TAX/BOOK RECONCILIATION	20,763.
TC PIPELINES - TAX/BOOK RECONCILIATION	10,123.
TOTAL TO FORM 990-PF, PART III, LINE 3	33,948.

FORM 990-PF U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS STATEMENT 8

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
US TREASURY INFLATION-INDEXED NOTES, 200,000 FACE, 1.875%	X		226,183.	248,214.
US TREASURY INFLATION-INDEXED NOTES, 75,000 FACE, 2.000%	X		87,773.	92,899.
RBC DAIN RAUSCHER - MUNICIPAL BONDS (SEE ATTACHED SCHEDULE)		X	447,375.	454,711.
TOTAL U.S. GOVERNMENT OBLIGATIONS			313,956.	341,113.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			447,375.	454,711.
TOTAL TO FORM 990-PF, PART II, LINE 10A			761,331.	795,824.

FORM 990-PF CORPORATE STOCK STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
RBC DAIN RAUSCHER - CORPORATE EQUITIES (SEE ATTACHED SCHEDULE)	2,318,568.	2,818,659.
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,318,568.	2,818,659.

STATEMENT(S) 6, 7, 8, 9

FORM 990-PF CORPORATE BONDS STATEMENT 10

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
RBC DAIN RAUSCHER - CORPORATE BONDS (SEE ATTACHED SCHEDULE)	2,745,855.	2,834,097.
TOTAL TO FORM 990-PF, PART II, LINE 10C	2,745,855.	2,834,097.

FORM 990-PF EXPLANATION CONCERNING PART VII-A, LINE 8B STATEMENT 11

EXPLANATION

THERE ARE NO STATE FILING REQUIREMENTS.

FORM 990-PF LIST OF SUBSTANTIAL CONTRIBUTORS STATEMENT 12  
PART VII-A, LINE 10

NAME OF CONTRIBUTOR	ADDRESS
HENRY PLITT CHARITABLE TRUST II FBO RAYMOND C. & LUCILLE M. FOX	ONE SOUTH WACKER DRIVE, SUITE 800 CHICAGO, IL 60606
SEDGE PLITT CHARITABLE TRUST II FBO RAYMOND C. & LUCILLE M. FOX	ONE SOUTH WACKER DRIVE, SUITE 800 CHICAGO, IL 60606

## Sedge Plitt Charitable Trust III

EIN: 35-6739620

### Domestic Equities

Description	Shares	2008 Cost Basis	2009 Cost Basis	2009 Market Value
Abbott Laboratories	1,000 00	37,368 12	37,368 12	53,990 00
Amcap Fund Inc, CI A	3,702 34	0 00	65,788 84	61,458 83
American Mutual Fund Inc, CI A	2,566 71	0 00	68,130 32	59,444 98
Baxter International	1,800 00	44,225 00	44,225 00	105,624 00
Berkshire Hathaway, CI B	36 00	105,354 00	105,354 00	118,296 00
Charles Schwab Corp	1,500 00	33,555 00	33,555 00	28,230 00
Chevron Corp	1,300 00	47,087 00	47,087 00	100,087 00
Coca Cola Co	600 00	0 00	25,921 92	34,200 00
Costco Wholesale Corp	2,000 00	67,730 00	67,730 00	118,340 00
Ebay	1,500 00	23,125 80	23,125 80	35,295 00
General Electric	4,000 00	137,378 80	137,378 80	60,520 00
Google Inc, CI A	60 00	0 00	19,603 58	37,198 80
HJ Heinz	1,500 00	51,127 50	51,127 50	64,140 00
Ishares Trust	1,000 00	54,500 00	54,500 00	74,790 00
Johnson and Johnson	1,000 00	64,740 00	64,740 00	64,410 00
Kellogg	2,000 00	70,208 00	70,208 00	106,400 00
Marine Petroleum Trust	5,000 00	121,875 00	121,875.00	72,250 00
McDonalds Corp	2,000 00	40,004 00	40,004.00	124,880 00
Medtronic Inc	1,000 00	47,820 00	47,820 00	43,980 00
Microsoft Corp	2,600 00	72,744 40	72,744 40	79,248 00
Oneok Partners	2,500 00	97,652 00	97,652 00	155,750 00
TC Pipelines	2,200 00	73,191 00	73,191 00	81,048 00
United Parcel Service	1,900 00	109,880 60	131,440 40	109,003 00
Wellpoint	1,725 00	92,744 44	116,911 69	100,550 25
Yum Brands	1,000 00	40,604 00	40,604 00	34,970 00
Zimmer Holdings Inc	1,000 00	0 00	53,577 50	59,110 00

### International Equities

Cemig - Sponsored ADR	3,000 00	0 00	41,573 50	54,180 00
Euro Pacific Growth Fund, CI A	971 43	0 00	31,960 96	37,244 78
Hongkong Electric Holdings	10,100 00	44,200 00	44,200 00	54,964 20
Nestle SA-Sponsored ADR	5,000 00	137,640 00	137,640 00	242,805 00
Philippine Long Distance Telephone Co	1,000.00	0 00	51,243 60	56,670 00
Surgutneftegaz Sponsored ADR	7,500 00	0 00	25,950 00	32,625 00
Unilever	2,250 00	42,088 50	42,088 50	72,742 50
Vodafone Group	2,625 00	71,180 00	71,180 00	60,611 25
Wal-Mart De Mexico	1,800 00	25,410 00	25,410 00	80,380 80

### Other Stock Holdings

Apartment Invt & Mgmt Co Preferred Stk	1,200 00	30,300 00	30,300 00	26,760 00
Templeton Global Income Fund	10,000 00	44,680 00	89,044 00	95,000 00
SPDR Gold Trust Gold Shares	200 00	16,313 86	16,313 86	21,462 00

<b>Totals:</b>		<b>1,844,727.02</b>	<b>2,318,568.29</b>	<b>2,818,659.39</b>
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## Sedge Plitt Charitable Trust III

EIN: 35-6739620

### Corporate Bonds

Description	Face	2008 Cost Basis	2009 Cost Basis	2009 Market Value
Ford Motor Bond, 5 8%	100,000 00	82,597 61	0 00	0 00
GTE California, 5 5%	50,000 00	50,000 00	0 00	0 00
JP Morgan and Chase, 6%	100,000 00	100,001 02	0 00	0 00
Intl Business Machines Corp, 5 375%	400,000 00	400,000 00	0 00	0 00
Federal Home Loan Bank, 4%	300,000 00	299,625 00	0 00	0 00
Federal Home Loan Bank, 5 21%	200,000 00	199,700 00	0 00	0 00
Federal Home Loan Bank, 1 000%	750,000 00	0 00	749,812 50	750,472 50
Home Depot, 5 2%	100,000 00	100,182 26	100,094 98	103,797 70
Federal Home Loan Bank, 4 2%	250,000 00	249,875 00	0 00	0 00
Federal Home Loan Bank, 4%	300,000 00	299,700 00	0 00	0 00
Time Warner, 5 5%	100,000 00	99,654 00	99,654 00	106,214 90
General Electric Cap Corp, 5 875%	150,000 00	0 00	152,125 21	160,786 50
Constellation Energy Bonds, 7 000%	150,000 00	0 00	151,384 49	162,839 70
Federal Home Loan Bank, 4 35%	250,000 00	249,687 50	249,687 50	254,532 50
Midamerican Energy Holdings, 5 875%	250,000 00	0 00	257,427 79	272,446 25
General Mills Inc, 5 250%	250,000 00	0 00	258,044 37	269,932 50
Wellpoint Inc, 6 000%	100,000 00	0 00	100,273 77	108,548 20
Federal Home Loan Mtg Corp, 3 350%	300,000 00	0 00	299,850 00	302,211 00
Federal Home Loan Bank, 3 000%	200,000 00	0 00	199,900 00	196,812 00
Zurich Reins Centre Hldgs, 7 125%	40,000 00	0 00	29,600 00	38,002 84
Wells Fargo Capital, 9 750%	100,000 00	0 00	98,000 00	107,500 00
Federal Home Loan Bank, 3 375%	400,000 00	399,600 00	0 00	0 00
Federal Home Loan Bank, 4 3%	300,000 00	300,000 00	0 00	0 00
<b>Totals:</b>		<b>2,830,622.39</b>	<b>2,745,854.61</b>	<b>2,834,096.59</b>

### Municipal Bonds

Description	Face	2008 Cost Basis	2009 Cost Basis	2009 Market Value
Bay Area Govt Assn Calif Lease Rev Bonds	75,000 00	75,079 50	0 00	0 00
Pinco Co AZ Lease Rev Bonds	30,000 00	29,980 96	0 00	0 00
Anzona Water Infrastructure Fin Auth	20,000 00	20,237 13	0 00	0 00
Palm Beach Cnty FL School Bonds	50,000 00	50,350 22	50,130 48	50,895 50
Chula Vista Calif Pub Bonds	20,000 00	19,815 21	19,930 22	20,127 40
Los Angeles Calif GO Bonds	25,000 00	25,306 69	25,125 43	25,600 25
Rocklin Calif Pub Fin Auth Bonds	5,000 00	4,899 45	4,964 05	5,054 65
Pasadena Calif CTFS Bonds	40,000 00	40,202 83	40,000 00	40,305 60
Los Angeles Cnty Calif School Bonds	25,000 00	25,391 09	25,249 11	26,132.75
California State Public Works Board Bonds	25,000 00	25,262 71	25,177 03	25,691 75
Allegheny Cnty PA GO Bonds	15,000 00	15,120 21	0 00	0 00
Allegheny Cnty PA GO Bonds	35,000 00	35,280.50	0.00	0.00
Henderson Nev Loc Impt Dists Bonds	85,000 00	85,003 32	85,003 32	85,792 20
Modesto Calif Rev Bonds	30,000 00	29,923 93	29,931 54	29,608 50
California State Rev Antic Notes	30,000 00	0 00	30,325 50	30,230 40
Port Oakland Calif Rev Ser M	25,000 00	0 00	25,269 01	26,707 75
Sonoma Cnty Calif Wtr Agy Water	25,000.00	0 00	25,226 62	26,530 50
University Calif Revs Multiple Purpose	30,000 00	0 00	30,572 13	31,239 90
Long Beach California GO Uni School	30,000 00	0 00	30,470 23	30,793.80
<b>Totals:</b>		<b>481,853.75</b>	<b>447,374.67</b>	<b>454,710.95</b>



FORM 990-PF GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR STATEMENT 13

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
EVANSTON NORTHWESTERN HEALTHCARE 2650 RIDGE AVE EVANSTON, IL 60201	NONE GENERAL FUNDS	PUBLIC	10,000.
FRIENDS OF THE ISREAL DEFENSE FORCES 350 - 5TH AVE NEW YORK, NY 10118	NONE GENERAL FUNDS	PUBLIC	25,000.
JEWISH UNITED FUND OF METRO. CHICAGO 30 SOUTH WELLS ST CHICAGO, IL 60606	NONE GENERAL FUNDS	PUBLIC	33,334.
PLITT SOUTHERN THEATERS EMPLOYEE FUND 7502 GREENVILLE AVE DALLAS, TX 75231	NONE GENERAL FUNDS	PRIVATE	250,000.
ST. JUDE CHILDREN'S RESEARCH HOSPITAL 501 ST. JUDE PLACE MEMPHIS, TN 38105	NONE GENERAL FUNDS	PUBLIC	50,000.
UNITED CEREBRAL PALSY 1660 L STREET NW, STE 700 WASHINGTON, DC 200365602	NONE GENERAL FUNDS	PUBLIC	25,000.
HOLOCAUST EDUCATIONAL FOUNDATION 64 OLD ORCHARD RD, STE 520 SKOKIE, IL 60077	NONE GENERAL FUNDS	PUBLIC	62,500.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

455,834.

HOWARD STONE TTEE  
 SEDGE PLITT CHARITABLE TRUST  
 III U/A DTD 12/04/1991  
 C/O RSM MCGLADREY INC  
 1 S WACKER DR STE 800  
 CHICAGO IL 60606-4650

PAGE
15 of 17
RECIPIENT'S ACCOUNT NUMBER
308-72037

CORRECTED COPY: March 13, 2010

### Schedule of Realized Gains and Losses

This section includes a summary of the short- or long-term gain or loss from the sale of selected securities in non-retirement accounts. "Short-term" refers to securities held for one year or less; "long-term" refers to securities held more than one year. RBC provides cost basis information as a service to its clients; the information may not be accurate for tax reporting or other purposes and may rely on information, such as the original cost basis for a security, that you or another source at your direction provided to RBC. Cost basis information may reflect a change in the value of certain fixed income and other securities that return or amortize principal over time. In the case of bonds purchased at a premium, cost basis information may be amortized. In addition, cost basis information may reflect accretion for zero coupon and OID bonds. Please refer to IRS Publications 1212 and 550 or contact your Tax Advisor for additional information.

#### Short-Term

QUANTITY	DESCRIPTION	OPEN DATE	NET COST	CLOSE DATE	NET PROCEEDS	REALIZED GAIN/LOSS
300,000.000	FEDERAL HOME LOAN BANK 4.000% DUE 10/15/2010 CUSIP: 3133XSDB1	09/24/08	299,625.00	01/15/09	300,000.00	375.00
300,000.000	FEDERAL HOME LOAN BANK 4.000% DUE 07/15/2011 CUSIP: 3133XSDD7	09/24/08	299,700.00	07/15/09	300,000.00	300.00
<b>Short-Term Subtotal</b>					<b>600,000.00</b>	<b>675.00</b>

#### Long-Term

QUANTITY	DESCRIPTION	OPEN DATE	NET COST	CLOSE DATE	NET PROCEEDS	REALIZED GAIN/LOSS
20,000.000	ARIZONA WTR INFRASTRUCTURE FIN WATER REV 2001 A 4.000% DUE 10/01/2009 ORIGINAL COST: 21,863.00, PREMIUM AMORTIZED: 1,863.00, ORIGINAL PRICE: 109.315 CUSIP: 040688CY7	06/04/03	20,000.00	10/01/09	20,000.00	0.00
75,000.000	BAY AREA GOVT ASSN CALIF LEASE CNTY OF ALAMEDA REV 2004-B 3.250% DUE 06/01/2009 ORIGINAL COST: 75,638.25, PREMIUM AMORTIZED: 638.25, ORIGINAL PRICE: 100.851 CUSIP: 07201XAX7	10/11/05	75,000.00	06/01/09	75,000.00	0.00
100,000.000	FORD MOTOR CREDIT CO NOTES 5.800% DUE 01/12/2009 CUSIP: 345397SG9	10/10/02	82,597.61	01/12/09	100,000.00	17,402.39
50,000.000	GTE CALIFORNIA ACQ BY VERIZON 5.500% DUE 01/15/2009 ORIGINAL COST: 50,532.95, PREMIUM AMORTIZED: 532.95, ORIGINAL PRICE: 101.060 CUSIP: 362311AJ1	10/10/02	50,000.00	01/15/09	50,000.00	0.00
400,000.000	INTL BUSINESS MACHINES CORP	10/10/02	400,000.00	02/02/09	400,000.00	0.00

HOWARD STONE TTEE  
 SEDGE PLITT CHARITABLE TRUST  
 III U/A DTD 12/04/1991  
 C/O RSM MCGLADREY INC  
 1 S WACKER DR STE 800  
 CHICAGO IL 60606-4650

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RECIPIENT'S ACCOUNT NUMBER
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CORRECTED COPY: March 13, 2010

### Schedule of Realized Gains and Losses (cont)

#### Long-Term (cont)

QUANTITY	DESCRIPTION	OPEN DATE	NET COST	CLOSE DATE	NET PROCEEDS	REALIZED GAIN/LOSS
	NOTES M-W T+10 5.375% DUE 02/01/2009 ORIGINAL COST: 423,198.18, PREMIUM AMORTIZED: 23,198.18, ORIGINAL PRICE: 105.790 CUSIP: 459200AT8					
100,000.000	MORGAN J P & CO INC MEDIUM TERM SUB NTS 6.000% DUE 01/15/2009 ORIGINAL COST: 103,424.55, PREMIUM AMORTIZED: 3,424.55, ORIGINAL PRICE: 103.425 CUSIP: 61688AAX6	10/10/02	100,000.00	01/15/09	100,000.00	0.00
30,000.000	PINAL CO AZ COP LEASE REV GENERAL PURPOSE REV 1998 4.500% DUE 06/01/2009 ORIGINAL COST: 29,530.00, DISCOUNT ACCRETED: 470.00, ORIGINAL PRICE: 98.422 CUSIP: 722007DG3	06/15/99	30,000.00	06/01/09	30,000.00	0.00
200,000.000	FEDERAL HOME LOAN BANK 5.210% DUE 02/24/2011 CUSIP: 3133XESM2	02/14/06	199,700.00	02/24/09	200,000.00	300.00
300,000.000	FEDERAL HOME LOAN BANK 4.300% DUE 04/29/2013 CUSIP: 3133XQYE6	04/23/08	300,000.00	04/29/09	300,000.00	0.00
250,000.000	FEDERAL HOME LOAN BANK 4.200% DUE 06/30/2011 CUSIP: 3133XRKS8	06/11/08	249,875.00	06/30/09	250,000.00	125.00
15,000.000	ALLEGHENY CNTY PA G/O PREREFUNDED-SER C-47 5.250% DUE 10/01/2012 ORIGINAL COST: 16,375.95, PREMIUM AMORTIZED: 1,375.95, ORIGINAL PRICE: 109.170 CUSIP: 01728VFF2	08/24/99	15,000.00	10/01/09	15,000.00	0.00
35,000.000	ALLEGHENY CNTY PA G/O UNREFUNDED BALANCE-SER C-47 5.250% DUE 10/01/2012 ORIGINAL COST: 38,210.55, PREMIUM AMORTIZED: 3,210.55, ORIGINAL PRICE: 109.170 CUSIP: 01728VFP0	08/24/99	35,000.00	10/01/09	35,000.00	0.00

HOWARD STONE TTEE  
 SEDGE PLITT CHARITABLE TRUST  
 III U/A DTD 12/04/1991  
 C/O RSM MCGLADREY INC  
 1 S WACKER DR STE 800  
 CHICAGO IL 60606-4650

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308-72037

**CORRECTED COPY:** March 13, 2010

# **Schedule of Realized Gains and Losses (cont)**

## **Long-Term (cont)**

QUANTITY	DESCRIPTION	OPEN DATE	NET COST	CLOSE DATE	NET PROCEEDS	REALIZED GAIN/LOSS
400,000.000	FEDERAL HOME LOAN BANK 3.375% DUE 12/24/2012 CUSIP: 3133XSQQ4	12/12/08	399,600.00	12/24/09	400,000.00	400.00
<b>Long-Term Subtotal</b>					<b>1,975,000.00</b>	<b>18,227.39</b>
<b>Total Gains and Losses</b>					<b>2,575,000.00</b>	<b>18,902.39</b>
<b>Short-Term</b>						<b>675.00</b>
<b>Long-Term</b>						<b>18,227.39</b>
<b>Term Unknown</b>						<b>0.00</b>

# Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► File a separate application for each return

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

**Do not complete Part II unless you have already been granted an automatic 3 month extension on a previously filed Form 8868.**

## **Part I** Automatic 3-Month Extension of Time. Only submit original (no copies needed)

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

**Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*.

<b>Type or print</b>  File by the due date for filing your return. See instructions.	Name of Exempt Organization	Employer identification number
	SEDGE PLITT CHARITABLE TRUST III	35-6739620
	Number, street, and room or suite no. If a P.O. box, see instructions C/O HOWARD STONE, ONE SOUTH WACKER DR., NO. 800	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions CHICAGO, IL 60606	

Check type of return to be filed (file a separate application for each return)

- |   |   |                                    |
|---|---|------------------------------------|
| <input type="checkbox"/> Form 990               | <input type="checkbox"/> Form 990-T (corporation)                 | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL            | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ            | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A                              | <input type="checkbox"/> Form 8870 |

### HOWARD STONE

- The books are in the care of ► **ONE SOUTH WACKER DRIVE, SUITE 800 - CHICAGO, IL 60606**  
Telephone No ► **(312) 634-3400** FAX No ► \_\_\_\_\_

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover.

- 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2010**, to file the exempt organization return for the organization named above. The extension is for the organization's return for  
► ☒ calendar year **2009** or  
► ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

- 2 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

<b>3a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$	1,592.
<b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$	1,592.
<b>c</b> <b>Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$	0.

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. 4-2009)

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**

**Note** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1)

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Type or print  File by the extended due date for filing the return. See instructions.	Name of Exempt Organization	Employer identification number
	SEDGE PLITT CHARITABLE TRUST III	35-6739620
	Number, street, and room or suite no. If a P O box, see instructions. C/O HOWARD STONE, ONE SOUTH WACKER DR., NO. 8	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions CHICAGO, IL 60606	

Check type of return to be filed (File a separate application for each return).

- ☐ Form 990    ☐ Form 990-EZ    ☐ Form 990-T (sec 401(a) or 408(a) trust)    ☐ Form 1041-A    ☐ Form 5227    ☐ Form 8870  
☐ Form 990-BL    ☒ Form 990-PF    ☐ Form 990-T (trust other than above)    ☐ Form 4720    ☐ Form 6069

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

**HOWARD STONE**

- The books are in the care of **ONE SOUTH WACKER DRIVE, SUITE 800 - CHICAGO, IL 60606**  
 Telephone No **(312) 634-3400** FAX No. \_\_\_\_\_
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 4 I request an additional 3-month extension of time until **NOVEMBER 15, 2010**
- 5 For calendar year **2009**, or other tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_
- 6 If this tax year is for less than 12 months, check reason. ☐ Initial return ☐ Final return ☐ Change in accounting period
- 7 State in detail why you need the extension  
**INFORMATION NECESSARY TO COMPLETE AND ACCURATELY FILE THIS RETURN IS NOT YET FULLY AVAILABLE**

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	1,592.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	1,592.
c <b>Balance Due.</b> Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

**Signature and Verification**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature *Howard Stone* Title *Managing Director* Date *8/12/10*  
 Form 8868 (Rev 4-2009)