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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

rori	calendar year 2009, or lax year beginning		, and ending		
G C	Check all that apply: Initial return	Initial return of a fo	ormer public charity	Final return	1
	Amended return Name of foundation	Audress chang	ge	A Employer identification	numher
	e the IRS Name of fourtoation			Limployer identification	i nombei
	erwise SEDGE PLITT CHARITABL	E TRUST III		35-6739620	•
	print Number and street (or P O box number if mail is not de		Room/suite	B Telephone number	
	rtype C/O HOWARD STONE, ONE	SOUTH WACKE	R DR. 800	(312) 634-	3400
	Specific City or town, state, and ZIP code	-	•	C If exemption application is p	ending, check here
Inst	ructions. CHICAGO, IL 60606			D 1. Foreign organizations	s, check here
H C	Check type of organization: X Section 501(c)(3) ex	empt private foundation		Foreign organizations me check here and attach co	eeting the 85% test, pomputation
	Section 4947(a)(1) nonexempt charitable trust	Other taxable private founda	ition	E If private foundation sta	tus was terminated
I Fa	ur market value of all assets at end of year 🏻 J 🛮 Accountu		Accrual	under section 507(b)(1	
,		her (specify)		F If the foundation is in a	60-month termination,
		mn (d) must be on cash b	pasis.)	under section 507(b)(1	
Pa	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)
	1 Contributions, gifts, grants, etc., received	326,031.	•	N/A	
	2 Check If the foundation is not required to attach Sch 8				
	3 Interest on savings and temporary cash investments		····		
	4 Dividends and interest from securities	181,476.	164,729.		STATEMENT 1
	5a Gross rents				
	Net rental income or (loss)	20 075			
e	6a Net gain or (loss) from sale of assets not on line 10 Gross sales price for all 2,577,073.	20,975.		REC	EIVED
Revenue	b assets on line 6a 2,577,073. Capital gain net income (from Part IV, line 2)	-	20,975.		
Re	8 Net short-term capital gain		20,575.	S NOV	9 2010
	9 Income modifications			0 100	9 7010 0
	10a and allowances		FIFT F - 1, 1, 1 1, 1	 	
	b Less Cost of goods sold			OGD	EN, UT
	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				
v	15 Pension plans, employee benefits				
nse	16a Legal fees	27 000	^		27 000
Expenses	b Accounting fees STMT 3	27,989.	0. E1 496		27,989.
	c Other professional fees STMT 4	51,486.	51,486.		0.
ativ	17 Interest 18 Taxes STMT 5	1,502.	1,454.		0.
Operating and Administrative	19 Depreciation and depletion	1,302.	T,474.		"
nini	20 Occupancy				
Adn	21 Travel, conferences, and meetings	186.	0.		186.
nd,	22 Printing and publications				1
g	23 Other expenses STMT 6	21,734.	5,821.		15,878.
atın	24 Total operating and administrative			_	1
per	expenses. Add lines 13 through 23	151,497.	70,911.		80,503.
0	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:				
	Excess of revenue over expenses and disbursements	-86,376.	400 522		
	b Net investment income (if negative, enter -0-)		107,266.	37/3	
	c_Adjusted net income (if negative, enter -0-)	<u> </u>		N/A	

Part II Balance Sheets Attached schedules and amounts in the description Beginning of year			nd of year		
-	column sho	ould be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1 Cash - non-interest-bearing		4,404.		
	2 Savings and temporary cash investme	ents	843,870.	444,462.	444,462.
	3 Accounts receivable ►	ì			
	Less: allowance for doubtful accounts	>	3,211.		
	4 Pledges receivable ►				
	Less: allowance for doubtful accounts	: •			
	5 Grants receivable	, -			
	6 Receivables due from officers, director	ore truetees and other			
	disqualified persons	ns, trustees, and other			
	1 _ ' '	_ -			
	7 Other notes and loans receivable				
	Less: allowance for doubtful accounts	, –			
Assets	8 Inventories for sale or use				
Ass	9 Prepaid expenses and deferred charg	. H	705 010	7.61 221	705 004
•	10a myesimenis - 0.5 and state governin		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	<u> </u>			
	Less accumulated depreciation	-			
	12 Investments - mortgage loans	ļ			
	13 Investments - other				
	14 Land, buildings, and equipment: basis	; -			
	Less accumulated depreciation	—			
	15 Other assets (describe ►)			
			c 200 c 4 4	6 0 T 0 0 4 6	
_	16 Total assets (to be completed by all f		6,322,644.	6,270,216.	6,893,042.
	17 Accounts payable and accrued expen-	ses			
	18 Grants payable				
es	19 Deferred revenue				
Liabilities	20 Loans from officers, directors, trustees, and	other disqualified persons			
de.	21 Mortgages and other notes payable	Ļ			
_	22 Other liabilities (describe >)			
_	23 Total liabilities (add lines 17 through		0.	0.	
	Foundations that follow SFAS 117, o	1			
Ø	and complete lines 24 through 26 as	nd lines 30 and 31.			
ЭC	24 Unrestricted	1			
alaı	25 Temporarily restricted	1			
Ä	26 Permanently restricted				
or Fund Balances	Foundations that do not follow SFAS	S 117, check here ► 🗶 📗	j		
F	and complete lines 27 through 31.				
ts	27 Capital stock, trust principal, or curre	–	5,038,411.	5,038,411.	
SSe	28 Paid-in or capital surplus, or land, bld		0.	0.	
Net Assets	29 Retained earnings, accumulated incor	ne, endowment, or other funds	1,284,233.	1,231,805.	
ž	30 Total net assets or fund balances	Ļ	6,322,644.	6,270,216.	
_	31 Total liabilities and net assets/fund	balances	6,322,644.	6,270,216.	
ΓP	Part III Analysis of Changes	in Net Assets or Fund Ba	alances		
		5.11	20		
1	Total net assets or fund balances at beginn		3 U	1.	6 222 644
	(must agree with end-of-year figure reporte	o on prior year's return)	•	1	6,322,644.
	Enter amount from Part I, line 27a	lar.	app am	AMEMENTO 7	-80,3/6.
	•	/ze) ▶	SEE STA	ATEMENT 7 3	33,948.
	Add lines 1, 2, and 3	_	•	4	6,270,216.
	Decreases not included in line 2 (itemize)		h /h.\ h / 00	5	0.
6_	Total net assets or fund balances at end of	year (line 4 minus line 5) - Part II, co	lumn (b), line 30	6	6,270,216.
					Form 990-PF (2009)

Ľ	Part IV Capital Gains	and Losses for Tax on in	nvestmen	income					
▔		ribe the kind(s) of property sold (e.g rehouse; or common stock, 200 sh		<u> </u>	(b) Hov P - P D - C	w acquired Purchase Donation	(c) Date a (mo., da		(d) Date sold (mo., day, yr.)
18	SEE ATTACHED S	HORT TERM SCHEDU	JLE			P	VARIO	OUS	VARIOUS
7	SEE ATTACHED L	ONG TERM SCHEDUL	Œ			P	VARIO		VARIOUS
		HS - CASH IN LIE	Ü			P	VARIO	OUS	VARIOUS
_	CAPITAL GAINS	DIVIDENDS							
_ (- -							
	(e) Gross sales price	(f) Depreciation allowed (or allowable)		it or other basis xpense of sale				ın or (loss (f) mınus	
	600,000.			599,32					675.
l	1,975,000.			1,956,77	3.				18,227.
_	73.								73.
_	2,000.								2,000.
_(<u> </u>								
_	Complete only for assets showing	ig gain in column (h) and owned by	the foundation	on 12/31/69		(l) Gains (Co	ol. (h) gain	minus
	(i) F M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col (ı) col. (ı), ıf any		C0	l. (k), but no Losses (from col.	(h))
	a								675.
Ī)								18,227.
_	C								73.
_	d								2,000.
_	e								
2	Capital gain net income or (net ca	If gain, also ente If (loss), enter -0	r ın Part I, line)- ın Part I, line	7 7	}	2			20,975.
3	Net short-term capital gain or (los	ss) as defined in sections 1222(5) ar	nd (6):			1			
	If gain, also enter in Part I, line 8,	column (c).	` ,		}				
_	If (loss), enter -0- in Part I, line 8					3		N/A	·
_		nder Section 4940(e) for				stment in	come		
(F	or optional use by domestic private	e foundations subject to the section	4940(a) tax on	net investment in	come.)				
lf -	section 4940(d)(2) applies, leave th	his nart hlank							
	3000001 13 10(0)(E) uppn03, 10210 11	no part dame.							
W	as the foundation liable for the sec	tion 4942 tax on the distributable an	nount of any ye	ear in the base per	lods				Yes X No
		lify under section 4940(e) Do not co							
<u> </u>	- ''	each column for each year, see instr	ructions before	making any entrie					(4)
	(a) Base period years	ng ug) Adjusted qualifying dis	etributione	Net value of no	(C) Incharita	hla-uca accate	. ,	Distri	(d) bution ratio
_	Calendar year (or tax year beginni	ing in)		iver value of flo			, v	col (b) ai	vided by col. (c))
_	2008		6,800.			718,746			.060547
_	2007		5,948.	 		998,874			.017661
_	2006		29,343.			580,058			.059021
_	2005		3,085.			553,043			.056381
_	2004		39,660.		5,	350,653	- •		.016757
_									210267
	Total of line 1, column (d)						2		.210367
3		5-year base period - divide the total	on line 2 by 5,	or by the number	of years	3			0.40053
	the foundation has been in existe	nce if less than 5 years					3		.042073
4	Enter the net value of noncharitat	ole-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 incom	ne (1% of Part I, line 27b)					6		1,073.
7	Add lines 5 and 6						7		270,345.
8	Enter qualifying distributions from	m Part XII, line 4					8		536,337.
	If line 8 is equal to or greater than See the Part VI instructions.	n line 7, check the box in Part VI, line	e 1b, and comp	olete that part usin	g a 1%	tax rate.			

SEDGE PLITT CHARITABLE TRUST III	35-6/39			Page 4
Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4	1948 - see II	nstru	ictio	<u>ns)</u>
* 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 X and enter 1%	1		1,0	<u>73.</u>
of Part I, line 27b				
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col. (b)	ŀ			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2			<u>0.</u>
3 Add lines 1 and 2	3		1,0	<u>73.</u>
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		1,0	<u>73.</u>
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)]			
d Backup withholding erroneously withheld 6d	1			
7 Total credits and payments. Add lines 6a through 6d	7		1,6	40.
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		5	67.
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax > 567. Refunded	11			0.
Part VII-A Statements Regarding Activities				
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene	ın		Yes	No
any political campaign?		1a		Х
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?		1b		X
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published	ed or			
distributed by the foundation in connection with the activities			:	
c Did the foundation file Form 1120-POL for this year?		1c		х
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:				
(1) On the foundation. \blacktriangleright \$ 0. (2) On foundation managers \blacktriangleright \$ 0.				
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?		2		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		3		Х
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		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	e law			
remain in the governing instrument?		6	Х	1
7 Did the foundation have at least \$5,000 in assets at any time during the year?		7	X	
If "Yes," complete Part II, col. (c), and Part XV				
8a Enter the states to which the foundation reports or with which it is registered (see instructions) 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 SEE STATEM	ENT 11	8b		х
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for cale	endar			
year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		9		Х
	TMT 12	10	Х	

STMT 12 10 X Form 990-PF (2009)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of sisten \$120\(1)30\(1)30\(1)47\(1)4	Pa	irt VII-A Statements Regarding Activities (continued)			
12 Dd the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2089. " 13 Dd the foundation comply with the public inspection requirements for its annual returns and exemption application?" Webside address ▶ N/A 17 The blooks are in care of ▶ HOWARD STONE Located at ▶ ONE SOUTH WACKER DRIVE, SUITE 800, CHICAGO, ILL ZIP+4 ▶ 606605 Section 4947(1) in onexempt charable thrists fining from 990-PF in lev of Form 1941- Check here and either the amount of Isk-exempt interest received or accrued during the year 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. 10 During the year did the foundation (either directly or indirectly)? 11 During the year did the foundation (either directly or indirectly)? 12 Degrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualided person? 13 Furnish goods, services, or facilities to (or accept them from) a disqualified person? 14 Pay compensation to, or pay or reimburse the expenses of, a disqualified person? 15 Pay compensation to, or pay or reimburse the expenses of, a disqualified person? 16 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 termisation of government sence, of, 4 terminal grant to or to employ the official for a period after termisation of government sence, determinang within 90 days; 15 Transfer any years in static throat or sent of the foundation engage in a prior year in any of the acts fact to quality under the exceptions described in Regulations section 3 494 (16)-3 or in a current indice regarding disaster assistance (see page 20 of the enstructions)? 16 Transfer and years are sensitively of the experiment of the complexity the official for a period after termisation of payment on accepting disaster assistance (see page 20	•11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
August 17, 2008? 12		section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
13 Dd the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 X	12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before			
Webste address ▶ N/A 14 The books are in care of ▶ HOWARD STONE 15 Section 4947(a)(1) anonexempt charitable trusts frian form 390-PF in lieu of Form 1041 - Check here and either the amount of lax-exempt interest received or accrued during the year 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. 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. 16 Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a dequalified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a dequalified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a dequalified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or properly to a povernment official? (Exception, Check 'No' of the floundation agreed to make a grant to or to employ the official for a period after termination of povernment service, if terminating within 90 days, and the distribution of povernment service, if terminating within 90 days and section 53 494 1(6)-3 or in a current notice regarding dissater assistance (see page 20 of the instructions)? 10 If any answer is "is to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53 494 1(6)-3 or in a current notice regarding dissater assistance (see page 20 of the instructions)? 11 A The mode of tax, year 2009, and the loundation have any undistributed moome (fines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? 11 Yes, its the years is less than a proveyer with the foundation have any undistributed		August 17, 2008?	12		X
14. The books are in care of ► HOWARD STONE	13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
Located at MONE SOUTH WACKER DRIVE, SUITE 800, CHICAGO, IL ZIP+4 \$60606 Section 4947(a)(1) nonexempt chantable trusts filing form 990-PF in liu of form 1041-Check here and other the amount of tax-exempt interest received or accrued during the year NA		Website address ► N/A			
Located at MONE SOUTH WACKER DRIVE, SUITE 800, CHICAGO, IL ZIP+4 \$60606 Section 4947(a)(1) nonexempt chantable trusts filing form 990-PF in liu of form 1041-Check here and other the amount of tax-exempt interest received or accrued during the year NA	14	The books are in care of ► HOWARD STONE Telephone no. ► (312)	634	-34	00
Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required No 15 N/A		Located at ►ONE SOUTH WACKER DRIVE, SUITE 800, CHICAGO, IL ZIP+4 ►60	606	_	
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 a 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for a service or view of the activation of a period of the exceptions disserted in Regulations section 53 4941(d)-3 or in a current notice regarding dissater assistance (see page 20 of the instructions)? 1 Taxes on failure to distribute income (section 4942(a)(2) or 494	15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here			
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept a from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance 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 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? If "Yes," list the years b b Are there any years listed in 2a for which the loundation have any undistributed income (times 6d and 6e, Part XIII) for tax year(s) beginning before 2009? If "Yes," list the years undistributed income? (If applying section 4942(a)(2) (relating to incorrect valuation of assets) to the years undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions.) b If yes, did it have excess business holdings in 2009 as a result o		and enter the amount of tax-exempt interest received or accrued during the year	N	/A	
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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available or disputations section 53 494 1(g)-3 or in a current notice reparding disaster assistance check here Did the foundation engage in a prior year in any of the acts bear bed in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009? If Yes \(\) No If Yes \(\) N	Pa	rt VII-B Statements Regarding Activities for Which Form 4720 May Be Required			
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Ja Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes X No		·			ļ
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? 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 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009? 4b X					
during the year? 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) 10 A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 20 A 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? 21 A Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that A Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose that A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose that A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose that A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose that A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose that A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose that A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose X Did the foundation invest during the year any amount in a manner that would jeopardize its charitable p	32				
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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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		· · · · · · · · · · · · · · · · · · ·			
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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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	t				
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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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	•				
Form 4720, to determine if the foundation had excess business holdings in 2009) AB Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? AB 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? AB Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that AB Did the first day of the tax year beginning in 2009? AB Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose that AB DID THE PROPERTY OF TH					
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			_{3h}		
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	4:		-		X
had not been removed from jeopardy before the first day of the tax year beginning in 2009? 4b X			- `		<u> </u>
	Ì		4 _h		х
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orm 990-PF (2009) SEDGE PLITT CHARITABLE T			35-67396	520	Page 6
Part VII-B Statements Regarding Activities for Which	Form 4720 May Be F	Required (contin	ued)		
5a During the year did the foundation pay or incur any amount to:					
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	า 4945(e))?	Ye	es X No		
(2) Influence the outcome of any specific public election (see section 4955); of	or to carry on, directly or indire	ectly,			1
any voter registration drive?		Ye	es X No		
(3) Provide a grant to an individual for travel, study, or other similar purposes	?	Ye	es X No		į
(4) Provide a grant to an organization other than a charitable, etc., organizatio	n described in section				
509(a)(1), (2), or (3), or section 4940(d)(2)?		Ye	es X No	- 1	i i
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f	for			
the prevention of cruelty to children or animals?		Ye	es X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify uni	der the exceptions described i	in Regulations			
section 53.4945 or in a current notice regarding disaster assistance (see instru	•	•	N/A	5b	
Organizations relying on a current notice regarding disaster assistance check h	ere		▶□	\neg	
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fi		ined	_		
expenditure responsibility for the grant?			es 🔲 No		
If "Yes," attach the statement required by Regulations section 53 494		,			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	, ,				
a personal benefit contract?	,	Y	es X No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal 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 s	helter transaction?	☐ Y€	s X No		
b If yes, did the foundation receive any proceeds or have any net income attribut			N/A	7b	_
Information About Officers Discotors Truck		nagers, Highly			
Part VIII Paid Employees, and Contractors	,				
List all officers, directors, trustees, foundation managers and their	compensation.				
	(b) Title, and average hours per week devoted	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e)	Expense unt, other
(a) Name and address	to position	(If not paid, enter -0-)	and deterred compensation	acco	unt, other owances
IOWARD STONE	TRUSTEE		- Component		
ONE SOUTH WACKER DRIVE, SUITE 800					
CHICAGO, IL 60606	9.00	48,600.	0.		0.
					-
		}			
				†	
					
· · · · · · · · · · · · · · · · · · ·					
Compensation of five highest-paid employees (other than those inc	luded on line 1). If none,	enter "NONE."	-		
() Norman and address of each annulation of the CO 000	(b) Title, and average		(d) Contributions to employee benefit plans and deferred	(e)	Expense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	and deferred compensation		unt, other owances
NONE			сотрепаван	 	
				 	
· · · · · · · · · · · · · · · · · · ·					
		 		†	
		<u> </u>		\vdash	
				1	
		 		+	
Tabel number of other employees paid over \$50,000	l	<u> </u>			

Form 990-PF (2009) SEDGE PLITT CHARITABLE TRUST III	35-	6739620 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundate Paid Employees, and Contractors (continued)	tion Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter	"NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	-	
Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities		<u>▶ </u> 0
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistic number of organizations and other beneficiaries served, conferences convened, research papers produced to the conference of the confer	cal information such as the uced, etc.	Expenses
1N/A		
2		
3		
4		
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on li	nes 1 and 2.	Amount
1 N/A		
2		
All other program-related investments. See instructions.		
3		

Total. Add lines 1 through 3

P	art X Minimum Investment Return (All domestic foundations	must e	complete this	part Foreign foui	ndations,	see instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charital	ble, etc	purposes:			
а	Average monthly fair market value of securities	,	,,,,		1a	5,997,556.
	Average of monthly cash balances			,	1b	500,024.
	Fair market value of all other assets				1c	·
d	Total (add lines 1a, b, and c)				1d	6,497,580.
е	Reduction claimed for blockage or other factors reported on lines 1a and					
	1c (attach detailed explanation)	1e	1	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	nt, see i	nstructions)		4	97,464.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and of	on Part	V, line 4		5	6,400,116.
6	Minimum investment return. Enter 5% of line 5				6	320,006.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) art XI foreign organizations check here		5) private opera	iting foundations ar	d certain	
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	1,073. 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 Par	rt XIII, I	ine 1		7	318,933.
P	art XII Qualifying Distributions (see instructions)					
1_	Amounts paid (including administrative expenses) to accomplish charitable, etc., pu	irposes				536,337.
	Expenses, contributions, gifts, etc total from Part I, column (d), line 26				1a	330,337.
þ		abla at			1b 2	<u>U•</u>
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charita	avie, ei	, purposes		2	
3	Amounts set aside for specific charitable projects that satisfy the:				20	
a	, , ,				3a 3b	
b 4	···,	and Da	et VIII. bene 4		4	536,337.
4 5	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, a Foundations that qualify under section 4940(e) for the reduced rate of tax on net inv		•		"	330,337•
J	income. Enter 1% of Part I, line 27b	/65HHE	II.		5	1 073
6	Adjusted qualifying distributions. Subtract line 5 from line 4				6	1,073. 535,264.
Ū	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years	when r	alculation wheth	her the foundation (
	4940(e) reduction of tax in those years.	***********	alouidiniy wiici	ner ine realitation (_f uannes IUI	and Section

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
Distributable amount for 2009 from Part XI, line 7				318,933.
2 Undistributed income, if any, as of the end of 2009				310,333.
a Enter amount for 2008 only			203,611.	
b Total for prior years:			203,011.	<u> </u>
b roun for prior yours.		0.		
3 Excess distributions carryover, if any, to 2009		<u> </u>		
a From 2004				
b From 2005				
c From 2006				
dFrom 2007				
e From 2008				
1 Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from			<u></u>	
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	0.			0.
must be shown in column (a)) 6 Enter the net total of each column as				
indicated below:	1 2 '7 0 2"			
& Corpus Add lines 3f, 4c, and 4e Subtract line 5	13,793.			
b Prior years' undistributed income. Subtract		0.		
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.			
IO 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.				5 000 DE (0000)

Form 990-PF		LITT CHARIT			35-67	39620 Page 10
	Private Operating F			I-A, question 9)	N/A	
'1 a If the fo	undation has received a ruling o	r determination letter that	it is a private operating			
foundat	ion, and the ruling is effective fo	r 2009, enter the date of t	he ruling	•		
b Check b	oox to indicate whether the found	dation is a private operatir	ng foundation described i	n section	4942(j)(3) or 49	42(1)(5)
2 a Enter th	e lesser of the adjusted net	Tax year		Prior 3 years		
ıncome	from Part I or the minimum	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
ınvestm	ent return from Part X for					
each ye	ar listed					
b 85% of	line 2a					
c Qualifyii	ng distributions from Part XII,					
line 4 fo	r each year listed					
d Amount	ts included in line 2c not					
used dii	rectly for active conduct of				1	
exempt	activities			}		
e Qualifyii	ng distributions made directly					
for activ	e conduct of exempt activities					
Subtrac	t line 2d from line 2c					
	te 3a, b, or c for the				1	
	ve test relied upon: 'alternative test - enter.					
	ue of all assets					
	ue of assets qualifying					
	der section 4942(j)(3)(B)(i) ment" alternative test - enter			-		
2/3 of m shown i	ninimum investment return n Part X, line 6 for each year					
listed						
c "Suppor	t" alternative test - enter		•			
invi divi sec	al support other than gross estment income (interest, idends, rents, payments on jurities loans (section					
	2(a)(5)), or royalties)					
` and org	oport from general public i 5 or more exempt anizations as provided in tion 4942(j)(3)(B)(iii)					
	gest amount of support from					
	exempt organization					
	ess investment income					==
Part XV	Supplementary Info	rmation (Comple	te this part only	if the foundation	had \$5,000 or mo	re in assets
	at any time during t	he year-see the i	nstructions.)		, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
1 Inform	ation Regarding Foundatio		-		- · ·	
a List any	managers of the foundation who it only if they have contributed m	o have contributed more t	than 2% of the total conti ection 507(d)(2).)	ributions received by the	foundation before the clos	e of any tax
NONE	, ,	. , , \	· N=1-1			
b List any	managers of the foundation who			or an equally large porti	on of the ownership of a pa	rtnership or
NONE	my, or which the localidation has	sa 1070 or greater interes)			
	ation Regarding Contributi	on Grant Gift Loan	Scholarship etc. Pr	ograme:		
Check h	ere X if the foundation o	nly makes contributions t	o preselected charitable	organizations and does	not accept unsolicited reque	sts for funds. If
	ne, address, and telephone numl					
	,	, , , , , , , , , , , , , , , , , , ,				
b The form	n in which applications should b	e submitted and informat	ion and materials they sh	nould include.		
c Any sub	mission deadlines:	· ·-				
d Anv rest	trictions or limitations on awards	s such as by geographica	l areas, charitable fields	kinds of institutions or	other factors:	
3 mg 100	and the second of analysis	., Jaon 20 of goograpiiloa	000, 0110110016 116105,	ando or mondituno, ur	omer menera,	

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Grants and Contributions Paid During the Y	Year or Approved for Future If recipient is an individual.		· · · · · · · · · · · · · · · · · · ·	
Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year	or substantial contributor	700,010,11		
		ŀ		
SEE STATEMENT 13				455 004
Total b Approved for future payment		T	▶ 3a	455,834.
NONE				
		}		
	•			
Total		L	<u> </u>	0.
923611 02-02-10				orm 990-PF (2009)

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

nter gross amounts unless otherwise indicated	Unrelated	ousiness income		y section 512, 513, or 514	(e)
1 Program service revenue:	(a) Business code	(b) Amount	(C) Exclu- sion code	(d) Amount	Related or exempt function income
a					
b			 	· · · · · · · · · · · · · · · · · · ·	
	_			-	
<u></u>	_		+		
e	-		+ +		
·			- 		
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			14	164,729.	16,747
	 		+++	104,725	
5 Net rental income or (loss) from real estate:					<u> </u>
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal					
property			111	7 5 2 7	
7 Other investment income			14	-7,527.	
8 Gain or (loss) from sales of assets other			18	20 075	
than inventory			- -	20,975.	
9 Net income or (loss) from special events					
O Gross profit or (loss) from sales of inventory					
1 Other revenue:					
a	_				
b	_				
c					
d	-				
e	_			100 100	16 848
2 Subtotal. Add columns (b), (d), and (e)		0	•	178,177.	16,747
3 Total. Add line 12, columns (b), (d), and (e)				13	194,924
See worksheet in line 13 instructions to verify calculations.)				
Part XVI-B Relationship of Activities	to the Accon	nplishment of I	Exempt P	urposes	
Line No. Explain below how each activity for which in			-A contributed	importantly to the accomp	dishment of
the foundation's exempt purposes (other the	an by providing fund	s for such purposes)			
NOT APPLICABLE					
				. =	
					

9) SEDGE PLITT CHARITABLE TRUST III 35-6739620
Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations Form 990-PF (2009)
Part XVII Ir 35-6739620

1	Did th	e organization directly or indi	rectly engage in any of the followin	g with any other organization	described in section 501(c) of	Yes	No
	the Co	ode (other than section 501(c))(3) organizations) or in section 52	7, relating to political organiz	rations?		
a	Trans	fers from the reporting founda	ation to a noncharitable exempt or	ganization of	-		
	(1) C	ash				1a(1)	X
	(2) 0	ther assets				1a(2)	X
b	Other	transactions:					
	(1) S	ales of assets to a noncharital	ble exempt organization			1b(1)	Х
			ncharitable exempt organization			1b(2)	X
		ental of facilities, equipment,				1b(3)	X
		eimbursement arrangements				1b(4)	X
	٠,	oans or loan guarantees				1b(5)	X
			embership or fundraising solicitatio	ne		1b(6)	X
,	٠,,		uling lists, other assets, or paid em			1c	X
			• •	· -	ays show the fair market value of the goods		
٠					in any transaction or sharing arrangement,		
			other assets, or services received.	od 1000 tildir tall market valde	The dry transaction of charmy arrangement		
a١	Line no	(b) Amount involved	(c) Name of noncharitable	exempt organization	(d) Description of transfers, transactions, an	d sharing arrangeme	ents
٠,	LIIIO IIO	(b)/illiount involved	N/A		(C) Eccampus of transfers, transfers, and		
_			N/A				
			· · · · · · · · · · · · · · · · · · ·				
							
_						_	
							
_							
							
			_				
22	ı Is the	foundation directly or indirec	tly affiliated with, or related to, one	or more tax-exempt organiza	ations described		
	ın sec	tion 501(c) of the Code (othe	r than section 501(c)(3)) or in sect	tion 527?		Yes X	.] No
t	if "Ye	s," complete the following sch	edule.				
		(a) Name of org	ganization	(b) Type of organization	(c) Description of relation	iship	
		N/A					
_							
٦					ents, and to the best of my knowledge and belief, it	is true, correct,	
	and con	nplete Declaration of preparer (oth	e han axp yer of fiduciary) is based on	all information of which preparer h			
ł		1 www	(NID) (-	11/14/10	nustel		
e	Si	gnature of officer or trustee	(Fine	Date	Title	_	
ב	<u> </u>	Preparer's			ate / Check if Prep	arer's identifying nun	nber
ıgı	.° ≥	signature	21.12:	. / "		P002857	46 "
0	Paid Preparer's Use Only	DCM	MCGLADREY INC		EIN >	10 47	• • •
	Se P.	A CATE	SOUTH WACKER DR	RIVE, SUITE 80	L		
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	L	auuress, anu zir cuue r CHIC	CAGO, IL 60606-3	1334		Form 990-PF (
						::::::::::::::::::::::::::::::::::::::	(2009)

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

Department of the Treasury Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2009

Employer identification number Name of the organization 35-6739620 SEDGE PLITT CHARITABLE TRUST III Organization type (check one): Filers of: Section: 501(c)(Form 990 or 990-EZ) (enter number) organization 4947(a)(1) nonexempt chantable trust not treated as a private foundation 527 political organization Form 990-PF 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule. Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions **General Rule** For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. **Special Rules** For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(v), 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, chantable, 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

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

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

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

Name of organization

Employer identification number

SEDGE PLITT CHARITABLE TRUST III

35-6739620

Part I	Contributors (see instructions)		
(a)	(b)	(c)	(d)
No.	Name, address, and ZIP + 4	Aggregate contributions	Type of contribution
	HENRY PLITT CHARITABLE TRUST II FBO		
1	RAYMOND C. & LUCILLE M. FOX	_	Person X
			Payroll
	ONE SOUTH WACKER DRIVE, SUITE 800	_ \$19,286.	Noncash
			(Complete Part II if there
	CHICAGO, IL 60606	_	is a noncash contribution)
(a)	(b)	(c)	(d)
No.	Name, address, and ZIP + 4	Aggregate contributions	Type of contribution
4	HENRY PLITT CHARITABLE TRUST II FBO		
4	RAYMOND C. & LUCILLE M. FOX	-	Person
	ONE COUNT WACKED DRIVE CHIME COA	242 502	Payroll V
	ONE SOUTH WACKER DRIVE, SUITE 800	_ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	Noncash X
	CUTCACO TI 60606		(Complete Part II if there
	CHICAGO, IL 60606	-	is a noncash contribution)
(a)	(b)	(c)	(d)
No.	Name, address, and ZIP + 4	Aggregate contributions	Type of contribution
	SEDGE PLITT CHARITABLE TRUST II FBO		
2	RAYMOND C. & LUCILLE M. FOX		Person X
		_	Payroll
	ONE SOUTH WACKER DRIVE, SUITE 800	_ \$3,093.	Noncash
			(Complete Part II if there
	CHICAGO, IL 60606	_	is a noncash contribution.)
(a) No.	(b) Name, address, and ZiP + 4	(c) Aggregate contributions	(d) Type of contribution
140.	SEDGE PLITT CHARITABLE TRUST II FBO	Aggregate contributions	Type of contribution
3	RAYMOND C. & LUCILLE M. FOX		Person
		-	Payroll
	ONE SOUTH WACKER DRIVE, SUITE 800	\$ 60,069.	Noncash X
		- -	(Complete Part II if there
	CHICAGO, IL 60606	İ	is a noncash contribution)
		_	
(a)	(b)	(c)	(d)
No.	Name, address, and ZIP + 4	Aggregate contributions	Type of contribution
		_	Person
i			Payroll
		_ \$	Noncash
'		-	(Complete Part II if there is a noncash contribution)
		-	is a noncash continuution)
(a)	(b)	(c)	(d)
No.	Name, address, and ZIP + 4	Aggregate contributions	Type of contribution
		_	Person
		<u> </u>	Payroll
		_ \$	Noncash
			(Complete Part II if there
			is a noncash contribution)
923452 02-0	01-10	Schedule B (Form	990, 990-EZ, or 990-PF) (2009)

Page 1 of 1 of Part II
Employer identification number

SEDGE PLITT CHARTTABLE TRUST III

35-6739620

PDGE	PLITT CHARITABLE TRUST III	35	-6739620
art 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
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
3	SEE ATTACHED SCHEDULE		
		ss60,069.	12/31/09
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		 s	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		*	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received

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

Description	Shares/Face	FMV
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 Agy MBIA	25,000.000	26,531
University CA Revs Multi FGIC	30,000.000	31,240
-	_	243.583

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

Description	Shares/Face	FMV
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
	_	60,069

^{*} 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

	_		
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 ONEOK PARTNERS - INTEREST	-15,402.	0.	-15,402.
RBC DAIN RAUSCHER - CORP BOND	442.	0.	442.
INT	68,431.	0.	68,431.
RBC DAIN RAUSCHER - DIVIDENDS	55,093.	2,000.	53,093.
RBC DAIN RAUSCHER - TAX EXEMPT	33,033.	2,000.	33,033.
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 O	THED INCOME		OTTA TOTAL CO.
FORM 930-FF	THER INCOME	. , , , , , , , , , , , , , , , , , , ,	STATEMENT 2
	(A)	(B)	(C)
	REVENUE	NET INVEST-	ADJUSTED
DESCRIPTION	PER BOOKS	MENT INCOME	NET INCOME
ROYALTIES - MARINE PETE TRUST UBI	6,39	2. 6,392.	
TC PIPELINES - BUSINESS INCOME	-3,76		
TC PIPELINES - SECTION 1231	-5		
ONEOK PARTNERS - BUSINESS INCOME	-10,28		,
ONEOK PARTNERS - SECTION 1231	-7		
RBC DAIN RAUSCHER - OTHER INCOME	25	0. 250.	•
TOTAL TO FORM 990-PF, PART I, LINE	11 -7,52	77,527.	

FORM 990-PF	ACCOUNTI	NG 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 C	THER PROFES	SIONAL FEES	S'	PATEMENT 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	TAX	ES	S'	TATEMENT 5	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES FEDERAL TAXES	1,454. 48.	1,454.		0.	
TO FORM 990-PF, PG 1, LN 18	1,502.	1,454.		0.	
FORM 990-PF	OTHER E	XPENSES	S'	TATEMENT 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 RBC DAIN RAUSCHER - ADR FEES	30. 380.	0. 380.		0.	

•				•	•
SEDGE PLITT CHARITABLE TRUST III				35-6739	620
MISCELLANEOUS FEES FRANCHISE TAX BOARD	152. 25.		152. 0.	:	0. 25.
TO FORM 990-PF, PG 1, LN 23	.,734.	5,	821.	15,8	78.
					
FORM 990-PF OTHER INCREASES IN NE	T ASSE	TS OR FU	ND BALANCES	STATEMENT	7
DESCRIPTION				AMOUNT	
ADJUSTMENT FOR CONTRIBUTION COST VA ONEOK PARTNERS - TAX/BOOK RECONCILI TC PIPELINES - TAX/BOOK RECONCILIAT	ATION	R BOOKS		3,00 20,70 10,12	63.
TOTAL TO FORM 990-PF, PART III, LIN	IE 3			33,94	18.
FORM 990-PF U.S. AND STATE/C	TTY GO	VERNMENT	OBLIGATIONS	STATEMENT	E
DESCRIPTION	U.S. GOV'T		BOOK VALUE	FAIR MARKE	Г
US TREASURY INFLATION-INDEXED NOTES, 200,000 FACE, 1.875% US TREASURY INFLATION-INDEXED	x		226,183.	248,22	14.
NOTES, 75,000 FACE, 2.000% RBC DAIN RAUSCHER - MUNICIPAL BONDS (SEE ATTACHED SCHEDULE)	;	х	87,773. 447,375.	92,89 454,71	
TOTAL U.S. GOVERNMENT OBLIGATIONS		-	313,956.	341,11	
TOTAL STATE AND MUNICIPAL GOVERNMEN	T OBLI	GATIONS	447,375.	454,71	L1.
TOTAL TO FORM 990-PF, PART II, LINE	10A	=	761,331.	795,82	24.
FORM 990-PF COR	PORATE	STOCK		STATEMENT	9
DESCRIPTION			BOOK VALUE	FAIR MARKET	r
RBC DAIN RAUSCHER - CORPORATE EQUIT ATTACHED SCHEDULE)	'IES (SI	EE -	2,318,568.	2,818,65	59.
TOTAL TO FORM 990-PF, PART II, LINE	10B	-	2,318,568.	2,818,65	59.
		_			

FORM 990-PF	CORE	PORATE BONDS		STATEMENT	10
DESCRIPTION			BOOK VALUE	FAIR MARKE VALUE	Т
RBC DAIN RAUSCHER - CO ATTACHED SCHEDULE)	RPORATE BONDS	(SEE	2,745,855.	2,834,0	97.
TOTAL TO FORM 990-PF,	PART II, LINE	10C	2,745,855.	2,834,0	97.
FORM 990-PF EXPLANA	TION CONCERNIN	NG PART VII-A,	LINE 8B	STATEMENT	11
EXPLANATION THERE ARE NO STATE FIL	ING REQUIREMEN	VTS.			
FORM 990-PF	LIST OF SUBSTA PART VII	ANTIAL CONTRIB	UTORS	STATEMENT	12
NAME OF CONTRIBUTOR		ADDRESS			
HENRY PLITT CHARITABLE RAYMOND C. & LUCILLE M		ONE SOUTH WAC	•	E 800	
SEDGE PLITT CHARITABLE RAYMOND C. & LUCILLE M		ONE SOUTH WAC	·	E 800	

CHICAGO, IL 60606

Sedge Plitt Charitable Trust III EIN: 35-6739620

Domestic Equities

— 		2008	2009	2009
Description	Shares	Cost Basis	Cost Basis	Market Value
Abbott Laboratories	1,000 00	37,368 12	37,368 12	53,990 00
Amcap Fund Inc, Cl 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
Zımmer Holdıngs 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
Totals:		1,844,727.02	2,318,568.29	2,818,659.39

Sedge Plitt Charitable Trust III EIN: 35-6739620

Corporate Bonds

		2008	2009	2009
Description_	Face	Cost Basis	Cost Basis	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

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Totals: 2,830,622.39 2,745,854.61 2,834,096.59

Municipal Bonds

iumcipai bonus				
		2008	2009	2009
Description	Face	Cost Basis	Cost Basis	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
Arizona 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 Calıf 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
Totals:		481,853.75	447,374.67	454,710.95

STATEMENT 13

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FORM 990-PF

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT		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 EDUCTIONAL FOUNDATION 64 OLD ORCHARD RD, STE 520 SKOKIE, IL 60077	NONE GENERAL FUNDS	PUBLIC	62,500.
TOTAL TO FORM 990-PF, PART XV, LI	TNE 3A		455,834.

GRANTS AND CONTRIBUTIONS

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

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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.

Tax Advisor fo	r additional information.					•	
	na la per estra (1938) en la propietación de la pro	Short-Term	1224 4424 7 1 222 24 42				
QUANTITY	DESCRIPTION	OPEN DATE	NET COST	CLOSE DATE	NET PROCEEDS	REALIZED GAIN/LOSS	
<u>~ 300,000.000</u>	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	
<u>300,000.000</u>	FEDERAL HOME LOAN BANK 4.000% DUE 07/15/2011 CUSIP: 3133XSDD7	09/24/08	299,700.00	07/15/09	<u>::300,000,00;</u>	300,00	
	Short-Term Subtotal				600,000.00	675.00	
		Long-Term			A A SA PER		
QUANTITY	DESCRIPTION	OPEN DATE	NET COST	CLOSE DATE	NET PROCEEDS	REALIZED	
20,000 000 ARIZONA WTR INFRASTRUCTURE FIN 06/04/03 20,000 00 10/01/09 20,000 00 00 00 00 00 00 00 00 00 00 00 0							
	FORD MOTOR GREDIT CONNOTES 5.800% DUE 01/12/2009 CUSIP: 345397SG9 GTE-CALIFORNIA ACQ BY VERIZON 5.500% DUE 01/15/2009 ORIGINAL COST: 50,532.95, PREMIU	10/10/02	50,000.00	01/15/09	50,000.00	0.90	
400,000,000	CUSIP: 362311AJ1					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

FAGE TO A STATE OF THE PAGE TO 16 of 17 RECIPIENTS ACCOUNT NUMBER 308-72037

CORRECTED COPY: March 13, 2010

			Realized				
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- 70.1	14-1111	HeCJ1-	REAUZEU		2411(1-1:		COULT .
			COUNTO	- Cuillo	. WIIW-L		COLLE

Eustraannig Thr Sibbasen Tuitus	Schedul	e of Realized Gains	and Los	ses (cont)		
		e angene es especial de la filia de la fil		u <del>sun 1902. Eus</del> usutuu eristanii	<u> Profesional de la Profesiona</u>	. * ##*********************************
		Long-Term (con	t):			
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, CUSIP: 459200AT8	PREMIUM AMORTIZED	): 23,198.18,	ORIGINAL F	PRICE: 105.790	)
100,000.000	MORGANJ P& CO INC MEDIUM TERM SUB NTS 6.000% DUE 01/15/2009 ORIGINAL COST: 103,424.55, CUSIP: 61688AAX6				,	<u> </u>
30,000:000	PINAL CO AZ COPTEASE REV GENERAL PURPOSE REV 1998 4.500% DUE 06/01/2009 ORIGINAL COST: 29,530.00, D CUSIP. 722007DG3		•			<u>ित्र स्थापिक</u>
200,000.000	FEDERAL HOME LOAN BANK 5.210% DUE 02/24/2011 CUSIP: 3133XESM2	02/14/06	199,700 00	02/24/09	<u>ૼ</u> 200,000,000	300.00
300,000.000	FEDERAL HOME LOAN BANK 4.300% DUE 04/29/2013 CUSIP: 3133XQYE6	<b>- 14 - 04/23/08</b> - 9	300,000,000	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	25.00
<b>35,000:000</b>	PREREFUNDED-SER C-47 5.250% DUE 10/01/2012 ORIGINAL COST: 16,375.95, P CUSIP: 01728VFF2		4. (-(12222		And the state of substates	0.00
35:000:000	ALLEGHENY ENTY PA G/O UNREFUNDED BALANCE-SEF 5.250% DUE 10/01/2012 ORIGINAL COST: 38,210.55, P CUSIP: 01728VFP0	R C-47				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 PAGE
17 of 17
RECIPIENT'S ACCOUNT NUMBER
308-72037

CORRECTED COPY: March 13, 2010

Schedule of Realized Gains and Losses (cont)						
		Long-Term (co	nt)			
		OPEN	NET	CLOSE	NET	REALIZED
QUANTITY	DESCRIPTION	DATE	COST	DATE	PROCEEDS	GAIN/LOSS
<u>#</u> 400,000.000	FEDERAL HOME LOAN BANK 3.375% DUE 12/24/2012 CUSIP: 3133XSQQ4	12/12/08	ૼઙૺૼ399 <u>;</u> 600.00 <u>\$</u>	==112/24/09	400,000.00	400.00
	Long-Term Subtotal	·····			1,975,000.00	18,227.39
Total Gains ar	nd Losses				2,575,000.00	18,902.39
	Short-Term					675.00
	Long-Term					18,227.39
	Term Unknown					0.00

### Form **8868**

(Rev April 2009) Department of the Treasury Internal Revenue Service

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

File a separate application for each return

OMB No. 1545-1709

<ul><li>If you</li></ul>	are filing for an Automatic 3-Month Extension, complete only Part I and check this box		ightharpoons
	are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this		
Do not	complete Part II unless you have already been granted an automatic 3 month extension on a previously fi	led Fo	rm 8868.
Part	Automatic 3-Month Extension of Time. Only submit original (no copies needed)		
A corpo	oration required to file Form 990-T and requesting an automatic 6-month extension - check this box and con	nplete	
Part I or	· · · ·		▶ □
	r corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request al come tax returns	exter	nsion of time
noted b (not aut you mu:	nic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electron comatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or construction or construction of the filly completed and signed page 2 (Part II) of Form 8868. For more details on the electronic file gov/efile and click on e-file for Chanties & Nonprofits.	ically i	f (1) you want the additional ated Form 990-T. Instead.
Type or	Name of Exempt Organization	Emp	loyer identification number
print			
File by the	SEDGE PLITT CHARITABLE TRUST III	3	5-6739620
due date fi filing your return See	or Number, street, and room or suite no. If a P.O. box, see instructions  C/O HOWARD STONE. ONE SOUTH WACKER DR., NO. 800		
instruction			
Check	type of return to be filed(file a separate application for each return)		
	orm 990		
	orm 990-BL Form 990-T (sec 401(a) or 408(a) trust) Form 52		
	orm 990-EZ Form 990-T (trust other than above) Form 60		
LX F	orm 990-PF	370	
Telep If the	HOWARD STONE books are in the care of ► ONE SOUTH WACKER DRIVE, SUITE 800 - CHI bohone No ► (312) 634-3400 FAX No ► c organization does not have an office or place of business in the United States, check this box s is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If the control of the group, check this box ► and attach a list with the names and EINs of all	ıs ıs fo	r the whole group, check this
	request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time uninated and the automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time uninated and the automatic 3-months for a corporation required to file Form 990-T) extension of time unitation.  **To file the exempt organization return for the organization named and the automatic and the autom		The extension
	tax year beginning , and ending		
•	, and one my		_
2 If	this tax year is for less than 12 months, check reason.		Change in accounting period
3a If	this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any		
	onrefundable credits. See instructions	3a	\$ 1,592.
b If	this application is for Form 990-PF or 990-T, enter any refundable credits and estimated		
ta	x payments made. Include any prior year overpayment allowed as a credit.	3b	\$ 1,592.
	alance Due. Subtract line 3b from line 3a Include your payment with this form, or, if required,		
	eposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System)		
S	ee instructions	3c	\$ 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)

Form 8	3868 (Rev 4-2009)				Page	2
● If v	ou are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II and check the	nis box			$\triangleright X$	
	Only complete Part II if you have already been granted an automatic 3-month extension on a previously			3.		
	ou are filing for an Automatic 3-Month Extension, complete only Part I (on page 1)					
Par		(no cop	oles need	ed).		_
.A <del>T.</del> K.	Name of Exempt Organization	7'3''			ation number	_
Туре	or Name of Exempt Organization	<u></u>				
print	SEDGE PLITT CHARITABLE TRUST III		35-	67396	20	
File by	the Number street and some provide no. If a P.O. have no locativisticals	27.52 I	For IRS u			_
extende due dat	🗝 C/O HOWARD STONE, ONE SOUTH WACKER DR., NO. 8	3000				_
filing th return			922 S			(00) (13)
instruct		<u> </u>	28 J. O. S.	3 / 1/2 ( ) / 1/2 		322
Chec	k 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 X Form 990-PF Form 990-T (trust other than above) Form 4720		🗌 Form (	6069		
STOR	P! Do not complete Part II if you were not already granted an automatic 3-month extension on a pro	eviousi	y filed Fo	orm 8868.		_
						_
	HOWARD STONE	CUTC	יאכט	TT 6	0606	
	e books are in the care of ONE SOUTH WACKER DRIVE, SUITE 800 - 0	СПІС	AGO,	ט עג	0000	_
	lephone No ► (312) 634-3400 FAX No. ►				<b>.</b> —	
	he organization does not have an office or place of business in the United States, check this box	15.41				
	his is for a Group Return, enter the organization's four digit Group Exemption Number (GEN)					3
box I	2011010000 15 2010	o <u>t all m</u>	nembers '	tne extens	SION IS TOP.	—
	I request an additional 3-month extension of time until NOVEMBER 15, 2010					
5	For calendar year 2009, or other tax year beginning, and end	ing				-
6	If this tax year is for less than 12 months, check reason.  Initial return Final return	1	L Cha	nge in acc	counting period	J
7	State in detail why you need the extension INFORMATION NECESSARY TO COMPLETE AND ACCURATELY FI	T EV O	DUTC	ם בייוום	N IS NO	<u></u>
		د غيد	LILIS	KEIOK	N 15 NO	<b>-</b>
	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				1,592	,
	nonrefundable credits. See instructions		8a \$		1,332	÷
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	1			1,592	,
	previously with Form 8868.		8b \$		1,392	÷
С	Balance Due. Subtract line 8b from line 8a Include your payment with this form, or, if required, deposit				0	١.
	with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instruction of the second state o	tions.	8c   \$			÷
	Signature and Verification			. 1	and balas	
Under	penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and ue, correct, and coppilete, and that I am authorized to prepare this form	i to the l	uest of my	knowleage	and belief,	
	and the second		Date >	2/2	/_	
ыдпаі	ure Villy of . They Ite MATERIA GARAGE		Date -	Form 8	B68 (Rev. 4-20)	191