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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 , 2009, and ending , 20

**G** Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return  
☐ Amended return ☐ Address change ☐ Name change

<b>Use the IRS label. Otherwise, print or type. See Specific Instructions.</b>	Name of foundation <b>SIMON CHARITABLE FOUNDATION</b>		A Employer identification number <b>36 3585646</b>	
	Number and street (or P O box number if mail is not delivered to street address) Room/suite <b>1308 JACKSON ST 614</b>		B Telephone number (see page 10 of the instructions) <b>402 597 8101</b>	
	City or town, state, and ZIP code <b>OMAHA, NE 68102</b>		C If exemption application is pending, check here <input type="checkbox"/>	
	<b>H</b> Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>D</b> 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <b>87675</b>		<b>J</b> Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____		
<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>				

Part I		Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions) )			
		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)	103475		
	2	Check <input type="checkbox"/> if the foundation is not required to attach Sch. B			
	3	Interest on savings and temporary cash investments	180	180	
	4	Dividends and interest from securities	101	101	
	5a	Gross rents			
	b	Net rental income or (loss)			
	6a	Net gain or (loss) from sale of assets not on line 10	-1329		
	b	Gross sales price for all assets on line 6a	102146		
	7	Capital gain or (loss) (from Part IV, line 2)		31688	
	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) (attach schedule)			
	11	Other income (attach schedule)			
	12	Total. Add lines 1 through 11	102427	31969	N/A
	13	Compensation of officers, directors, trustees, etc.			
	14	Other employee salaries and wages			
	15	Pension plans, employee benefits			
	16a	Legal fees (attach schedule)	110		110
	b	Accounting fees (attach schedule)			
	c	Other professional fees (attach schedule)			
	17	Interest			
	18	Taxes (attach schedule) (see page 14 of the instructions)	14		
	19	Depreciation (attach schedule) and depletion			
	20	Occupancy			
	21	Travel, conferences, and meetings			
	22	Printing and publications			
	23	Other expenses (attach schedule)	20		20
	24	Total operating and administrative expenses. Add lines 13 through 23	144		130
25	Contributions, gifts, grants paid	225533		225533	
26	Total expenses and disbursements. Add lines 24 and 25	225677	31969	225663	
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	-123250			
b	Net investment income (if negative, enter -0-)		31969		
c	Adjusted net income (if negative, enter -0-)			N/A	

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<b>Part II Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .					
	<b>2</b> Savings and temporary cash investments . . . . .	210925	87675	87675		
	<b>3</b> Accounts receivable ▶ . . . . .					
	Less: allowance for doubtful accounts ▶ . . . . .					
	<b>4</b> Pledges receivable ▶ . . . . .					
	Less: allowance for doubtful accounts ▶ . . . . .					
	<b>5</b> Grants receivable . . . . .					
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions) . . . . .					
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ . . . . .					
	Less: allowance for doubtful accounts ▶ . . . . .					
	<b>8</b> Inventories for sale or use . . . . .					
	<b>9</b> Prepaid expenses and deferred charges . . . . .					
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule)					
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .					
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .					
	<b>11</b> Investments—land, buildings, and equipment: basis ▶ . . . . .					
Less: accumulated depreciation (attach schedule) ▶ . . . . .						
<b>12</b> Investments—mortgage loans . . . . .						
<b>13</b> Investments—other (attach schedule) . . . . .						
<b>14</b> Land, buildings, and equipment: basis ▶ . . . . .						
Less: accumulated depreciation (attach schedule) ▶ . . . . .						
<b>15</b> Other assets (describe ▶ . . . . .)						
<b>16 Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I) . . . . .	210925	87675	87675			
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .					
	<b>18</b> Grants payable . . . . .					
	<b>19</b> Deferred revenue . . . . .					
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons					
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .					
	<b>22</b> Other liabilities (describe ▶ . . . . .)					
<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .						
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/>					
	and complete lines 24 through 26 and lines 30 and 31.					
	<b>24</b> Unrestricted . . . . .					
	<b>25</b> Temporarily restricted . . . . .					
	<b>26</b> Permanently restricted . . . . .					
	<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/>					
	and complete lines 27 through 31.					
	<b>27</b> Capital stock, trust principal, or current funds . . . . .	1000	1000			
<b>28</b> Paid-in or capital surplus, or land, bldg., and equipment fund						
<b>29</b> Retained earnings, accumulated income, endowment, or other funds	209925	86675				
<b>30 Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .	210925	87675				
<b>31 Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .	210925	87675				

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b> 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) . . . . .	<b>1</b>	210925
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	-123250
<b>3</b> Other increases not included in line 2 (itemize) ▶ . . . . .	<b>3</b>	
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	87675
<b>5</b> Decreases not included in line 2 (itemize) ▶ . . . . .	<b>5</b>	
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	<b>6</b>	87675

**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.)
<b>1a</b>	publicly traded securities			
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				

  

(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)
<b>a</b> 102146		70458	31688
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

  

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

  

<b>2</b> 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 }	<b>2</b>	31688
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8	<b>3</b>	

**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.

(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	16893	45583	.370599
2007	13199	10935	1.207042
2006	12183	20312	.599793
2005	397635	49117	8.095670
2004	87339	44160	1.977785

  

<b>2</b> Total of line 1, column (d)	<b>2</b>	12.250889
<b>3</b> 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	<b>3</b>	2.450178
<b>4</b> Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	<b>4</b>	134932
<b>5</b> Multiply line 4 by line 3	<b>5</b>	330607
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	320
<b>7</b> Add lines 5 and 6	<b>7</b>	330927
<b>8</b> Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.	<b>8</b>	225663

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

<b>1a</b>	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>b</b>	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	<b>1</b>		639
<b>c</b>	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>		-0-
<b>3</b>	Add lines 1 and 2	<b>3</b>		639
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>		-0-
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	<b>5</b>		639
<b>6</b>	Credits/Payments:			
<b>a</b>	2009 estimated tax payments and 2008 overpayment credited to 2009	<b>6a</b>		
<b>b</b>	Exempt foreign organizations—tax withheld at source	<b>6b</b>		
<b>c</b>	Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>		
<b>d</b>	Backup withholding erroneously withheld	<b>6d</b>		
<b>7</b>	Total credits and payments. Add lines 6a through 6d	<b>7</b>		
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	<b>8</b>		
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	<b>9</b>		639
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	<b>10</b>		
<b>11</b>	Enter the amount of line 10 to be: <b>Credited to 2010 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/>	<b>11</b>		

**Part VII-A Statements Regarding Activities**

<b>1a</b>	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?	<b>Yes</b>	<b>No</b>
<b>1a</b>			✓
<b>b</b>	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?		✓
<b>1b</b>			
	<i>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.</i>		
<b>c</b>	Did the foundation file <b>Form 1120-POL</b> for this year?		✓
<b>1c</b>			
<b>d</b>	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ -0- (2) On foundation managers. ▶ \$ -0-		
<b>e</b>	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ -0-		
<b>2</b>	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	<b>2</b>	✓
<b>3</b>	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? <i>If "Yes," attach a conformed copy of the changes.</i>	<b>3</b>	✓
<b>4a</b>	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	<b>4a</b>	✓
<b>b</b>	If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?	<b>4b</b>	
<b>5</b>	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	<b>5</b>	✓
<b>6</b>	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?	<b>6</b>	✓
<b>7</b>	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	<b>7</b>	✓
<b>8a</b>	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ <b>NEBRASKA</b>		
<b>b</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? <i>If "No," attach explanation</i>	<b>8b</b>	✓
<b>9</b>	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? <i>If "Yes," complete Part XIV</i>	<b>9</b>	✓
<b>10</b>	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	<b>10</b>	✓

**Part VII-A Statements Regarding Activities (continued)**

<b>11</b>	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	<b>11</b>		✓
<b>12</b>	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	<b>12</b>		✓
<b>13</b>	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ►	<b>13</b>	✓	
<b>14</b>	The books are in care of ► <b>FREDERICK J SIMON</b> Telephone no. ► <b>402 597 8101</b> Located at ► <b>11030 O STREET, OMAHA, NE</b> ZIP+4 ► <b>68137 2346</b>			
<b>15</b>	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here. <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year . . . . . ► <b>15</b>			

**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
<b>1a</b> 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? ( <b>Exception.</b> 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>b</b> If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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)? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Organizations relying on a current notice regarding disaster assistance check here . . . . . ► <input type="checkbox"/>	<b>1b</b>	
<b>c</b> 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? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<b>1c</b>	✓
<b>2</b> 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)):		
<b>a</b> 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 ► 20____, 20____, 20____, 20____		
<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions.) . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<b>2b</b>	
<b>c</b> If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. ► 20____, 20____, 20____, 20____		
<b>3a</b> 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>b</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? ( <i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.</i> ) . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<b>3b</b>	
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>	✓
<b>b</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?	<b>4b</b>	✓

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)****5a** During the year did the foundation pay or incur any amount to:(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? **5b**Organizations relying on a current notice regarding disaster assistance check here ☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No **6b****b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No **7b**

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

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
FREDERICK J SIMON 1308 JACKSON, #614, OMAHA, NE 68102	PRES & TREAS <5	-0-	-0-	-0-
EVE B SIMON 1308 JACKSON, #614, OMAHA, NE 68102	VP & SEC < 5	-0-	-0-	-0-

**2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."**

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** *(continued)***3 Five highest-paid independent contractors for professional services** (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

Expenses

<b>1</b> N/A	
<b>2</b>	
<b>3</b>	
<b>4</b>	

**Part IX-B Summary of Program-Related Investments** (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

Amount

<b>1</b> N/A	
<b>2</b>	
All other program-related investments. See page 24 of the instructions.	
<b>3</b>	
<b>Total.</b> Add lines 1 through 3 . . . . . ▶	



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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities . . . . .	<b>1a</b>	23077
<b>b</b>	Average of monthly cash balances . . . . .	<b>1b</b>	113910
<b>c</b>	Fair market value of all other assets (see page 24 of the instructions) . . . . .	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c) . . . . .	<b>1d</b>	136987
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) . . . . .	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets . . . . .	<b>2</b>	
<b>3</b>	Subtract line 2 from line 1d . . . . .	<b>3</b>	136987
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions) . . . . .	<b>4</b>	2055
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	134932
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5 . . . . .	<b>6</b>	6747

**Part XI Distributable Amount** (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

<b>1</b>	Minimum investment return from Part X, line 6 . . . . .	<b>1</b>	6747
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5 . . . . .	<b>2a</b>	639
<b>b</b>	Income tax for 2009. (This does not include the tax from Part VI.) . . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b . . . . .	<b>2c</b>	639
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1 . . . . .	<b>3</b>	6108
<b>4</b>	Recoveries of amounts treated as qualifying distributions . . . . .	<b>4</b>	
<b>5</b>	Add lines 3 and 4 . . . . .	<b>5</b>	6108
<b>6</b>	Deduction from distributable amount (see page 25 of the instructions) . . . . .	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 . . . . .	<b>7</b>	6108

**Part XII Qualifying Distributions** (see page 25 of the instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26 . . . . .	<b>1a</b>	225663
<b>b</b>	Program-related investments—total from Part IX-B . . . . .	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes . . . . .	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required) . . . . .	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule) . . . . .	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	225663
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions) . . . . .	<b>5</b>	
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4 . . . . .	<b>6</b>	225663

**Note.** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

**Part XIII Undistributed Income** (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
<b>1</b> Distributable amount for 2009 from Part XI, line 7 . . . . .				<b>6108</b>
<b>2</b> Undistributed income, if any, as of the end of 2009:				
<b>a</b> Enter amount for 2008 only . . . . .			<b>0</b>	
<b>b</b> Total for prior years: 20____, 20____, 20____		<b>0</b>		
<b>3</b> Excess distributions carryover, if any, to 2009:				
<b>a</b> From 2004 . . . . . <b>85927</b>				
<b>b</b> From 2005 . . . . . <b>400490</b>				
<b>c</b> From 2006 . . . . . <b>8845</b>				
<b>d</b> From 2007 . . . . . <b>12662</b>				
<b>e</b> From 2008 . . . . . <b>14628</b>				
<b>f</b> <b>Total</b> of lines 3a through e . . . . .	<b>522552</b>			
<b>4</b> Qualifying distributions for 2009 from Part XII, line 4: ► \$ <b>225663</b>				
<b>a</b> Applied to 2008, but not more than line 2a . . . . .			<b>0</b>	
<b>b</b> Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		<b>0</b>		
<b>c</b> Treated as distributions out of corpus (Election required—see page 26 of the instructions) . . . . .	<b>0</b>			
<b>d</b> Applied to 2009 distributable amount . . . . .				<b>6108</b>
<b>e</b> Remaining amount distributed out of corpus . . . . .	<b>219555</b>			
<b>5</b> Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	<b>0</b>			<b>0</b>
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5 . . . . .	<b>742107</b>			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .		<b>0</b>		
<b>c</b> 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 . . . . .		<b>0</b>		
<b>d</b> Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions . . . . .		<b>0</b>		
<b>e</b> Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions . . . . .			<b>0</b>	
<b>f</b> Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010 . . . . .				<b>0</b>
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions) . . . . .	<b>0</b>			
<b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions) . . . . .	<b>85927</b>			
<b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a . . . . .	<b>656180</b>			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2005 . . . . . <b>400490</b>				
<b>b</b> Excess from 2006 . . . . . <b>8845</b>				
<b>c</b> Excess from 2007 . . . . . <b>12662</b>				
<b>d</b> Excess from 2008 . . . . . <b>14628</b>				
<b>e</b> Excess from 2009 . . . . . <b>219555</b>				

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

<b>1a</b> If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling . . . . .	N/A				
<b>b</b> Check box to indicate whether the foundation is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)					
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .	<b>Tax year</b>	<b>Prior 3 years</b>			<b>(e) Total</b>
	<b>(a) 2009</b>	<b>(b) 2008</b>	<b>(c) 2007</b>	<b>(d) 2006</b>	
<b>b</b> 85% of line 2a . . . . .					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:					
<b>a</b> "Assets" alternative test—enter:					
<b>(1)</b> Value of all assets . . . . .					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .					
<b>b</b> "Endowment" alternative test—enter <sup>2</sup> / <sub>3</sub> of minimum investment return shown in Part X, line 6 for each year listed . . . . .					
<b>c</b> "Support" alternative test—enter:					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) . . . . .					
<b>(3)</b> Largest amount of support from an exempt organization . . . . .					
<b>(4)</b> Gross investment income . . . . .					

**Part XV Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see page 28 of the instructions.)

**1 Information Regarding Foundation Managers:**

**a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

FREDERICK J SIMON

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

NONE

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

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

**a** The name, address, and telephone number of the person to whom applications should be addressed:

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

**c** Any submission deadlines:

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

**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)				
<b>a</b> <i>Paid during the year</i>  <b>SEE ATTACHED SCHEDULE</b>				
<b>Total</b>				<b>3a</b> 225533
<b>b</b> <i>Approved for future payment</i>  <b>NONE</b>				
<b>Total</b>				<b>3b</b> -0-

## Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions.)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue:					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments . . . . .					
3	Interest on savings and temporary cash investments			14	180	
4	Dividends and interest from securities . . . . .			14	101	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property . . . . .					
b	Not debt-financed property . . . . .					
6	Net rental income or (loss) from personal property					
7	Other investment income . . . . .					
8	Gain or (loss) from sales of assets other than inventory					
9	Net income or (loss) from special events . . . .					
10	Gross profit or (loss) from sales of inventory . .					
11	Other revenue: a _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal. Add columns (b), (d), and (e) . . . . .				281	
13	Total. Add line 12, columns (b), (d), and (e) . . . . .				13	281

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

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

[illegible]



**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

**SIMON CHARITABLE FOUNDATION**

Employer identification number

**36 : 3585646**

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

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

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

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

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

☐ 501(c)(3) taxable private foundation

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

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

**General Rule**

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

**Special Rules**

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33⅓% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year . . . . . ▶ \$ .....

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

Name of organization  
SIMON CHARITABLE FOUNDATION

Employer identification number  
36 : 3585646

**Part I** Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	FREDERICK J SIMON 1308 JACKSON ST., #614 OMAHA, NE 68102	\$ 103475	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.)
			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.)
			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.)



**Employer identification number**  
36 : 3585646

[illegible]

**SIMON CHARITABLE FOUNDATION E.I.N. 36-3585646**  
**FOR THE YEAR ENDED 12/31/09**  
**SCHEDULE OF INFORMATION FOR FORM 990-PF**

**PART I, LINE 16, LEGAL FEES:**

Abrahams, Kaslow & Cassman	Legal Consultation	<u>\$110</u>
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**PART I, LINE 18, TAX EXPENSE:**

2008 Form 990-PF	Tax on net investment income	<u>\$14</u>
		<u>\$14</u>

**PART I, LINE 23, OTHER EXPENSES:**

Nebraska Secretary of State	Filing fee	<u>\$20</u>
	Total	<u>\$20</u>

**SIMON CHARITABLE FOUNDATION E.I.N. 36-3585646  
FOR THE YEAR ENDED 12/31/09  
SCHEDULE OF INFORMATION FOR FORM 990-PF**

**PART XV SUPPLEMENTARY INFORMATION  
3 GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR**

RECIPIENT NAME AND ADDRESS	IF INDIVIDUAL, RELATIONSHIP TO MANAGER	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
<b>Action on Smoking and Health</b> 2013 H Street NW Washington DC 20077-2410	N/A	PUBLIC	SUPPORT PROTECTION OF NONSMOKERS' RIGHTS	\$50.00
<b>ALZHEIMER'S ASSOCIATION</b> CHICAGO, IL 60601	N/A	PUBLIC	PROMOTE ALZHEIMER'S DISEASE RESEARCH	\$150 00
<b>AMERICAN CIVIL LIBERTIES UNION</b> NEW YORK, NY 10275	N/A	PUBLIC	PROMOTE SECURITY OF LIBERTIES ENJOYED BY AMERICANS	\$250.00
<b>AMERICAN INDIAN EDUCATION FOUNDATION</b> P.O. BOX 27491 ALBUQUERQUE, NM 87125-9847	N/A	PUBLIC	HELP LESS FORTUNATE NATIVE AMERICANS IN THE GREAT PLAINS	\$90 00
<b>AMERICAN INDIAN RELIEF COUNCIL</b> PO BOX 6200 RAPID CITY, SD 57709-6200	N/A	PUBLIC	HELP LESS FORTUNATE NATIVE AMERICANS IN THE GREAT PLAINS	\$150.00
<b>AMERICAN LUNG ASSOCIATION</b> ALBERT LEA, MN 56007	N/A	PUBLIC	SUPPORT LUNG DISEASE RESEARCH	\$150.00
<b>AMERICAN POLICE &amp; SHERIFFS' ASSN</b> PO BOX 17547 INDIANAPOLIS, IN 46217	N/A	PUBLIC	ASSIST COUNTY LAW ENFORCEMENT PERSONNEL	\$15 00
<b>AMNESTY INTERNATIONAL</b> NEW YORK, NY 10001	N/A	PUBLIC	SUPPORT EFFORTS TO SAVE LIVES VICTIMS OF TORTURE AND OTHER HUMAN RIGHTS VIOLATIONS	\$100.00
<b>ASPEN SANTA FE BALLET</b> SANTA FE, NM	N/A	PUBLIC	HELP FUND SCHOLARSHIP FOR ADVANCED DANCE STUDENT	\$800 00
<b>BEMIS CENTER FOR CONTEMPORARY ARTS</b> 724 South 12th Street Omaha, NE 68102	N/A	PUBLIC	SPONSOR PERFORMING ARTISTS	\$5,170.00
<b>BETH EL SYNAGOGUE</b> 14506 California St Omaha, NE 68154	N/A	PUBLIC	SUPPORT RELIGIOUS INSTRUCTION	\$200 00
<b>BIG BROTHERS BIG SISTERS OF THE MIDLANDS</b> 4902 HAMILTON STREET OMAHA, NE 68132	N/A	PUBLIC	SUPPORT MENTORING RELATIONSHIPS WITH ADULT ROLE MODELS	\$6,000.00
<b>BLUE BARN THEATRE</b> OMAHA, NE 68102	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	\$1,000 00
<b>BOYS &amp; GIRLS CLUBS OF THE MIDLANDS</b> OMAHA, NE	N/A	PUBLIC	YOUTH SERVICES	\$7,000.00
<b>BRIGIT SAINT BRIGIT THEATRE CO.</b> OMAHA, NE 68102	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	\$20,000.00
<b>BROWNVILLE CONCERT SERIES</b> BROWNVILLE, NE	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	\$2,500 00
<b>COMMITTEE FOR ACCURACY IN MIDDLE EAST REPORTING IN AMERICA (CAMERA)</b> BOSTON, MA 02135	N/A	PUBLIC	SUPPORT ACCURATE NEWS REPORTING	\$100.00

RECIPIENT NAME AND ADDRESS	IF INDIVIDUAL, RELATIONSHIP TO MANAGER	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
<b>CENTER FOR CONTEMPORARY ARTS</b> SANTA FE, NM	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	\$500.00
<b>CENTRAL HIGH SCHOOL FOUNDATION</b> OMAHA, NE 68102	N/A	PUBLIC	SUPPORT YOUTH EDUCATION PROGRAMS	\$750.00
<b>CHICAGO HUMANITIES FESTIVAL</b> 500 NORTH DEARBORN ST, STE 825 CHICAGO, IL 60610-4900	N/A	PUBLIC	SUPPORT FOSTERING A COMMON CIVIC CULTURE	\$100.00
<b>CHICAGOLAND JEWISH HIGH SCHOOL MUSIC PROGRAM</b> CHICAGO, IL	N/A	PUBLIC	SUPPORT YOUTH EDUCATION PROGRAMS	\$100.00
<b>CHILD SAVING INSTITUTE</b> OMAHA, NE 68132	N/A	PUBLIC	SUPPORT DISADVANTAGED YOUTHS	\$200.00
<b>COLLEGE OF SAINT MARY</b> OMAHA, NE 68106	N/A	PUBLIC	SUPPORT YOUTH EDUCATION PROGRAMS	\$200 00
<b>CYSTIC FIBROSIS FOUNDATION</b> 2679 Farnam, Suite 205 Omaha, NE 68131	N/A	PUBLIC	SUPPORT CYSTIC FIBROSIS RESEARCH	\$100.00
<b>DOMESTIC VIOLENCE COORDINATING COUNCIL</b> OMAHA, NE 68114	N/A	PUBLIC	PROVIDE SUPPORT FOR VICTIMS OF DOMESTIC VIOLENCE	\$100.00
<b>DURHAM MUSEUM</b> OMAHA, NE	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	\$500 00
<b>EASTERN NEBRASKA OFFICE ON AGING</b> OMAHA, NE 68105	N/A	PUBLIC	PROVIDE ASSISTANCE FOR ELDERLY NEBRASKANS	\$100.00
<b>EPPLEY INST. FOR RESEARCH IN CANCER</b> DEWEY & 42ND STREETS OMAHA, NE 68111	N/A	PUBLIC	SUPPORT CANCER RESEARCH	\$100.00
<b>FILM STREAMS</b> OMAHA, NE 68102	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	\$4,750.00
<b>FINE LINES</b> OMAHA, NE 68124	N/A	PUBLIC	SUPPORT DEVELOPMENT OF YOUNG AUTHORS	\$100 00
<b>FIREFIGHTERS AND POLICE APPRECIATION FOUNDATION</b> OMAHA, NE 68154	N/A	PUBLIC	PROMOTE SAFETY FOR FIREFIGHTERS AND POLICE	\$2,150.00
<b>FIRST SERVE - NEW MEXICO</b> SANTA FE, NM 87594	N/A	PUBLIC	SUPPORT YOUTH EDUCATION PROGRAMS	\$100.00
<b>FONTENELLE NATURE ASSOCIATION</b> BELLEVUE, NE 68005	N/A	PUBLIC	SUPPORT PRESERVATION OF NATURAL HABITATS	\$250 00
<b>FRIENDS OF LIED CENTER FOR PERFORMING ARTS</b> LINCOLN, NE	N/A	PUBLIC	SPONSOR PERFORMING ARTISTS	\$100 00
<b>HADASSAH MEDICAL ORGANIZATION</b> 50 WEST 58TH STREET NEW YORK, NY 10019	N/A	PUBLIC	SUPPORT EFFORTS FOR ACHIEVING PEACE	\$100.00
<b>INSTITUTE FOR HOLOCAUST EDUCATION</b> OMAHA, NE 68154	N/A	PUBLIC	SUPPORT PUBLIC EDUCATION REGARDING THE HOLOCAUST	\$10,100 00
<b>JEWISH FEDERATION OF OMAHA FOUNDATION</b> 333 South 132nd St. Omaha, NE 68154	N/A	PUBLIC	PROVIDE FUNDS FOR COMMUNITY BENEFIT ACTIVITIES	\$3,100.00

RECIPIENT NAME AND ADDRESS	IF INDIVIDUAL, RELATIONSHIP TO MANAGER	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
<b>JOSIE HARPER RESIDENCE / OMAHA HOSPICE HOUSE</b> OMAHA, NE 68124	N/A	PUBLIC	SUPPORT PROGRAMS FOR THOSE WITH TERMINAL ILLNESSES	\$100.00
<b>JOSLYN ART MUSEUM</b> 2200 Dodge Street Omaha, NE 68102	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	\$3,550 00
<b>JOSLYN CASTLE TRUST</b> 9729 NOTTINGHAM DRIVE OMAHA, NE 68114	N/A	PUBLIC	SUPPORT PRESERVATION OF THE JOSLYN CASTLE	\$250.00
<b>KANEKO</b> OMAHA, NE 68102	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	\$3,000.00
<b>KAVOD</b> OMAHA, NE 68114	N/A	PUBLIC	PROVIDE FUNDS FOR COMMUNITY BENEFIT ACTIVITIES	\$250.00
<b>KRIPKE JEWISH FEDERATION LIBRARY</b> OMAHA, NE 68154	N/A	PUBLIC	SUPPORT LIBRARY PROGRAMS	\$100.00
<b>LAURITZEN GARDENS</b> 100 BANCROFT STREET OMAHA, NE 68108	N/A	PUBLIC	SUPPORT CHILDREN'S EDUCATIONAL PROGRAMMING	\$350 00
<b>LA FAMILIA MEDICAL CENTER</b> SANTA FE, NM 87502	N/A	PUBLIC	PROVIDE MEDICAL & DENTAL CARE TO UNINSURED INDIVIDUALS	\$500.00
<b>METROPOLITAN COMM. COLLEGE FOUNDATION</b> OMAHA, NE 68103	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	\$18,000 00
<b>MUSUEM OF MODERN ART</b> NEW YORK, NY 10008	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	\$120.00
<b>MUSUEM OF NEBRASKA ART</b> KEARNEY, NE 68847	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	\$500 00
<b>MUSEUM OF NEW MEXICO FOUNDATION</b> SANTA FE, NM 87504	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	\$150.00
<b>NATIONAL DANCE INSTITUTE OF NEW MEXICO</b> SANTA FE, NM 87501	N/A	PUBLIC	SUPPORT PROGRAMS TO DEVELOP YOUNG DANCERS	\$250.00
<b>NEBRASKA APPLESEED CENTER FOR LAW IN THE PUBLIC INTEREST</b> LINCOLN, NE 68508	N/A	PUBLIC	PROVIDE ACCESS TO LEGAL SERVICES TO NE FAMILIES	\$100.00
<b>NEBRASKA CHILDREN &amp; FAMILIES FOUNDATION</b> LINCOLN, NE 68508	N/A	PUBLIC	SUPPORT YOUTH PROGRAMS	\$100.00
<b>NEBRASKA CULTURAL ENDOWMENT</b> OMAHA, NE 68102	N/A	PUBLIC	SUPPORT PUBLIC ART EXHIBITIONS	\$1,040 00
<b>NEBRASKA DISTRICT METROPOLITAN AUDITIONS</b> LINCOLN, NE 68502	N/A	PUBLIC	SUPPORT AUDITIONS OF YOUNG SINGERS	\$100 00
<b>NEBRASKA HUMANE SOCIETY</b> 8929 FORT STREET OMAHA, NE 68134	N/A	PUBLIC	SUPPORT PREVENTION OF CRUELTY TO ANIMALS	\$100.00
<b>NEBRASKA SHAKESPEARE FESTIVAL</b> OMAHA, NE	N/A	PUBLIC	SUPPORT PUBLIC PERFORMANCES	\$780.00

RECIPIENT NAME AND ADDRESS	IF INDIVIDUAL, RELATIONSHIP TO MANAGER	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
<b>NEBRASKANS FOR THE ARTS</b> OMAHA, NE	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	\$100 00
<b>NEW YORK UNIVERSITY CANCER CENTER</b> NEW YORK, NY 10016	N/A	PUBLIC	SUPPORT MEDICAL RESEARCH	\$100.00
<b>OMAHA CONSERVATORY OF MUSIC</b> OMAHA, NE 68114	N/A	PUBLIC	SUPPORT EDUCATION PROGRAMS AND PERFORMANCES	\$1,000.00
<b>OMAHA CREATIVE INSTITUTE</b> OMAHA, NE 68102	N/A	PUBLIC	SUPPORT ART WORKSHOPS	\$100.00
<b>OMAHA POLICE FOUNDATION</b> 740 S. 75th Street Omaha, NE 68114	N/A	PUBLIC	OMAHA POLICE OFFICE RECOGNITION	\$100.00
<b>OMAHA ZOO FOUNDATION</b> OMAHA, NE 68107	N/A	PUBLIC	SUPPORT ZOO OPERATIONS & EDUCATION PROGRAMS	\$700 00
<b>OPERA OMAHA</b> 1625 Farnam, Ste 100 Omaha, NE 68102	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	\$62,699.19
<b>OPERA OMAHA GUILD</b> 1625 Farnam, Ste 100 Omaha, NE 68102	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	\$100 00
<b>OPERA THEATRE OF SAINT LOUIS</b> 210 HAZEL AVENUE ST. LOUIS, MO 63119	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	\$3,300.00
<b>OSCA</b> OMAHA, NE 68132	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	\$100 00
<b>PHOENIX ART MUSEUM</b> 1625 NORTH CENTRAL AVENUE PHOENIX, AZ 85004	N/A	PUBLIC	SUPPORT PUBLIC ART EXHIBITIONS	\$740.00
<b>PLANNED PARENTHOOD OF NEBRASKA AND COUNCIL BLUFFS</b> LINCOLN, NE 68510	N/A	PUBLIC	PROVIDE FAMILY PLANNING EDUCATION PROGRAMS	\$500 00
<b>PROJECT INTERFAITH</b> OMAHA, NE 68106	N/A	PUBLIC	SUPPORT RELIGIOUS INSTRUCTION	\$150 00
<b>ROSE BLUMKIN HOME</b> 333 South 132nd St Omaha, NE 68154	N/A	PUBLIC	SUPPORT HOUSING PROGRAMS FOR INDIGENT ADULTS	\$100.00
<b>SALVATION ARMY</b> OMAHA, NE 68131	N/A	PUBLIC	TOYLAND AND FODD VOUCHER PROGRAMS	\$1,000.00
<b>SAN FRANCISCO OPERA ASSOCIATION</b> SAN FRANCISCO, CA 94102	N/A	PUBLIC	FISCAL YEAR 2009 GENERAL OPERATIONS	\$100.00
<b>SANTA FE CHAMBER MUSIC FESTIVAL</b> PO BOX 2227 SANTA FE, NM 87504-2227	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	\$3,250.00
<b>SANTA FE COMMUNITY FOUNDATION</b> SANTA FE, NM 87504	N/A	PUBLIC	SUPPORT ENDOWMENT FUND	\$100.00
<b>SANTA FE CONCERT ASSOCIATION</b> SANTA FE, NM	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	\$100.00
<b>SANTA FE NEW MUSIC</b> SANTA FE, NM 87502	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	\$100.00

RECIPIENT NAME AND ADDRESS	IF INDIVIDUAL, RELATIONSHIP TO MANAGER	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
<b>SANTA FE OPERA</b> P O Box 2408 Santa Fe, NM 87504-2408	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	\$7,588.00
<b>SANTA FE RESTAURANT ASSOCIATION</b> Santa Fe, NM 87505	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	\$100.00
<b>SIENA FRANCIS HOUSE</b> OMAHA, NE 68101	N/A	PUBLIC	ASSISTANCE TO INDIGENT FAMILIES	\$100 00
<b>SOUTHPARK ELEM SCHOOL MUSIC DEPARTMENT</b> DEERFIELD, IL 60015	N/A	PUBLIC	SUPPORT SCHOOL MUSIC PROGRAMS	\$100.00
<b>Southwestern Ass'n for Indian Arts, Inc.</b> P O. BOX 969 Santa Fe, NM 87504	N/A	PUBLIC	Award sponsorship	\$2,500 00
<b>ST AUGUSTINE INDIAN MISSION</b> WINNEBAGO, NE 68701	N/A	PUBLIC	HELP LESS FORTUNATE NATIVE AMERICANS IN THE GREAT PLAINS	\$500.00
<b>ST VINCENT DEPAUL SOCIETY</b> OMAHA, NE 68102	N/A	PUBLIC	SUPPORT DISADVANTAGED FAMILIES	\$100 00
<b>TELLURIDE FILM FESTIVAL</b> 800 JONES STREET BERKELEY, CA 94710	N/A	PUBLIC	PERPETUATE AND ENHANCE THE SERVICE AND QUALITY OF THE FESTIVAL	\$12,500.00
<b>TEMPLE ISRAEL</b> 7023 Cass Street Omaha, NE 68132	N/A	PUBLIC	SUPPORT RELIGIOUS INSTRUCTION AND PROVIDE FUNDS FOR ENDOWMENTS	\$19,341.00
<b>TUESDAY MUSICAL CONCERT SERIES</b> OMAHA, NE 68106	N/A	PUBLIC	SUPPORT PUBLIC MUSICAL PERFORMANCES	\$500 00
<b>UNITED WAY OF THE MIDLANDS</b> OMAHA, NE 68102	N/A	PUBLIC	PROVIDE FUNDS FOR PROGRAMS	\$11,000.00
<b>USTA SERVES</b> 70 WEST RED OAK LANCE WHITE PLAINS, NY 10604	N/A	PUBLIC	FACILITATE PURCHASE OF TENNIS EQUIPMENT FOR CHILDREN IN AFTER-SCHOOL PROGRAM	\$100.00
<b>WILLA CATHER FOUNDATION</b> RED CLOUD, NE 68970	N/A	PUBLIC	ENDOWMENT FUND MEMORIALS	\$100 00
<b>TOTAL CONTRIBUTIONS</b>				<u><u>\$225,533.19</u></u>