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44

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

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.

0912

2009

For calendar year 2009, or tax year beginning 2009, and ending 20

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

Use the IRS label. Name of foundation: D. G. Brungard Foundation. Employer identification number: 36-4263563. Telephone number: 704 847-4449. Check type of organization: Section 501(c)(3) exempt private foundation.

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12), Operating and Administrative Expenses (13-26), and Summary (27-28).

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)			
		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1	Cash—non-interest-bearing	4,585	1,049	1,049
	2	Savings and temporary cash investments	0	0	0
	3	Accounts receivable ▶ Less: allowance for doubtful accounts ▶	0	0	0
	4	Pledges receivable ▶ Less: allowance for doubtful accounts ▶	0	0	0
	5	Grants receivable	0		
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)	0	0	0
	7	Other notes and loans receivable (attach schedule) ▶ Less: allowance for doubtful accounts ▶	0	0	0
	8	Inventories for sale or use	0	0	0
	9	Prepaid expenses and deferred charges	0	0	0
	10a	Investments—U.S. and state government obligations (attach schedule)	0	0	0
	b	Investments—corporate stock (attach schedule)	14,464	22,945	434
	c	Investments—corporate bonds (attach schedule)	0	0	0
	11	Investments—land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶	0	0	0
	12	Investments—mortgage loans	0	0	0
	13	Investments—other (attach schedule)	0	0	0
	14	Land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶	0	0	0
15	Other assets (describe ▶)	0	0	0	
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	19,049	23,994	1,483	
Liabilities	17	Accounts payable and accrued expenses	0	0	
	18	Grants payable	0	0	
	19	Deferred revenue	0	0	
	20	Loans from officers, directors, trustees, and other disqualified persons	0	0	
	21	Mortgages and other notes payable (attach schedule)	0	0	
	22	Other liabilities (describe ▶)	0	0	
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input type="checkbox"/>				
	24	Unrestricted	0	0	
	25	Temporarily restricted	0	0	
	26	Permanently restricted	0	0	
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>				
	27	Capital stock, trust principal, or current funds	4,585	1,049	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	14,464	22,945	
30	Total net assets or fund balances (see page 17 of the instructions)	19,049	23,994		
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	19,049	23,994		

Part III Analysis of Changes in Net Assets or Fund Balances			
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	19,049
2	Enter amount from Part I, line 27a	2	4,585
3	Other increases not included in line 2 (itemize) ▶ '08 clk# 1002 clrd '09 + Funds to initiate new chkg acct	3	360
4	Add lines 1, 2, and 3	4	23,994
5	Decreases not included in line 2 (itemize) ▶	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	23,994

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(j) F.M.V. as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col. (j) over col. (k), if any		
a				
b				
c				
d				
e				
2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8	{ If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8 }		3

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see page 18 of the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008			
2007			
2006			
2005			
2004			
2	Total of line 1, column (d)		2
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years		3
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5		4
5	Multiply line 4 by line 3		5
6	Enter 1% of net investment income (1% of Part I, line 27b)		6
7	Add lines 5 and 6		7
8	Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.		8

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

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

Part VII-A Statements Regarding Activities

	Yes	No
1a		✓
1b		✓
1c		✓
2		✓
3		✓
4a		✓
4b		✓
5		✓
6	✓	
7	✓	
8b	✓	
9		✓
10		✓

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		✓
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶	13	✓	
14	The books are in care of ▶ Donald G. Brungard Telephone no. ▶ 704-847-4449 Located at ▶ 4255 Piper Glen Dr., Charlotte, NC ZIP+4 ▶ 28277-1330			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here. and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			<input type="checkbox"/>

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	✓
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions.)	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	✓
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	

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)? Organizations relying on a current notice regarding disaster assistance check here **5b**
- 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
- b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? Yes No
If "Yes" to 6b, file Form 8870. **6b**
- 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? Yes No **7b**

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
Donald G. Brungard 4255 Piper Glen Dr., Charlotte, NC 28277	Pres. 2 hrs/wk	0	0	0
Kathleen L. Brungard 4255 Piper Glen Dr., Charlotte, NC 28277	Secy. 1 hr/wk	0	0	0
Heda Palmer 1462 Angle Trn, W. Dundee, IL 60118	Tres. 1 hr/wk	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
1 NONE	
2 -----	
3 -----	
4 -----	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 -----	
2 -----	
3 All other program-related investments. See page 24 of the instructions. -----	
Total. 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.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	14,738
b	Average of monthly cash balances	1b	3,311
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	18,049
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	18,049
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	271
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	17,778
6	Minimum investment return. Enter 5% of line 5	6	889

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

1	Minimum investment return from Part X, line 6	1	889
2a	Tax on investment income for 2009 from Part VI, line 5	2a	0
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	0
c	Add lines 2a and 2b	2c	0
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	889
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	889
6	Deduction from distributable amount (see page 25 of the instructions)	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	889

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	4,625
b	Program-related investments—total from Part IX-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	4,625
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	4,625

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

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

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				889
2 Undistributed income, if any, as of the end of 2009:				
a Enter amount for 2008 only			761	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 4,625				
a Applied to 2008, but not more than line 2a			761	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)	0			
d Applied to 2009 distributable amount				3,864
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	(2,975)			(2,975)
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	(2,975)			
b Prior years' undistributed income. Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
d Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions		0		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions			0	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)	0			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	0			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	(2,975)			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009	2,975			

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

- 1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling ▶
- b** Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

	Tax year				(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

- 1 Information Regarding Foundation Managers:**
- a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)
-
- 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.
-
- 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:
 Ms. Heda Palmer 910Locust Dr., Sleepy Hollow, IL 60118 847-428-0575
-
- b** The form in which applications should be submitted and information and materials they should include:
 Written requests only stating objectives, budget and justification of need
-
- c** Any submission deadlines:
 None - Requests may take 90-120 days to process
-
- d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:
 Grants may be limited to the stated objectives of the D. G. Brungard Foundation

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
The Avon Foundation 1345 Avenue of the Americas	+	501(c)(3)	Walk for breast cancer	\$200
Charlotte Concerts P.O. Box 11456	+	501(c)(3)	Student Musical instrument grant	\$2,000
Painesville United Methodist Church 71 N. Park Place	+	501(c)(3)	Lunch program for the needy	\$2,400
Total				3a \$4,600
b Approved for future payment				
Total				3b

Schedule for Form 990-PF - 2009

Primary Contributor - Donald G. Brungard 38W443 Woodhill Ln. St. Charles, IL, 60175

Part VIIA In10

Final

D. G. Brungard Foundation - Contributions

Year	Type	Donor	Date	Cost	Shares	Sh Price	Value@Rcpt	MktVal@EOY
1998	Stock	D. G. Brungard	12/14/98	\$100,002.16	Hyseq	13.8750	\$158,715	\$1,876.29
1999	Cash	R&R Enterprises	05/1/99	\$3,964.15			\$3,964	\$3,964.15
	Stock	D. G. Brungard	12/14/99	\$51,250.84	Hyseq	44.0625	\$220,313	\$815.00
	Cash	Coventry Wood	12/27/99	\$3,000.00			\$3,000	\$3,000.00
	Cash	Springhill Apts	12/27/99	\$1,000.00			\$1,000	\$1,000.00
	Stock	D. G. Brungard	12/28/99	\$10,250.17	Hyseq	52.5000	\$52,500	\$163.00
1999	Total				1000.00000		\$280,777	\$8,842.15
2000	Stock	D. G. Brungard	02/17/00	\$8,498.22	Hyseq	360.7500	\$286,657	\$134.04
	Cash	D. G. Brungard	02/24/00	\$500.00			\$500	\$500.00
	Stock	D. G. Brungard	03/15/00	\$17,083.33	Hyseq	135.0000	\$225,000	\$271.67
	Cash	D. G. Brungard	12/20/00	\$3,000.00			\$3,000	\$3,000.00
2000	Total				1666.66667		\$525,157	\$3,905.71
2001	Total						\$0.00	\$0.00
2002	Total						\$0.00	\$0.00
2003	Total						\$0.00	\$0.00
2004	Total						\$0.00	\$0.00
2005	Total						\$0.00	\$0.00
2006	Total						\$0.00	\$0.00
2007	Cash	K. L. Brungard	11/15/07	\$2,000.00			\$2,000.00	\$2,000.00
2007	Cash	D. G. Brungard	12/23/07	\$2,500.00			\$2,500.00	\$2,500.00
2007	Total						\$4,500.00	\$4,500.00
2008	Cash	D. G. Brungard	03/26/08	\$600.00			\$600.00	\$600.00
2008	Cash	D. G. Brungard	10/10/08	\$200.00 to fund new checking			\$200.00	\$200.00
2008	Total						\$800.00	\$800.00
2009	Total	K. L. Brungard	10/13/09	\$1,000.00 Cash for Crwn Society	20000.00000	Part I in 1(e)	\$1,000.00	\$1,000.00
	Grand Total			\$205,648.87			\$71,948.53	\$21,024.15

D. G. Brungard Foundation - Investment Assets

Year	Type	Donor	Date	Cost	Shares	Sh Price	BookValue@Rcpt	MktVal@EOY	Comments
1998	Stock	D. G. Brungard	12/16/98	\$100,002.16	Hyseq	\$13.8750	\$159,715.13		
2008	Stock	Found. Sale	12/23/08	-\$100,002.16	Nuvelo	\$13.8750	-\$159,715.13		11511 Share Sale 12/23/08
1999	Reimain			\$0.00	0.00000		0.00000	\$0.00	
1999	Stock	D. G. Brungard	12/14/99	\$51,250.84	Hyseq	\$44.0625	\$220,312.50		
2003	Stock	Found. Sale	11/10/03	-\$1,821.11	Nuvelo	\$44.0625	-\$7,828.44		178 Share Sale 11/10/03
2004	Stock	Found. Sale	09/28/04	-\$6,828.61	Nuvelo	\$44.0625	-\$29,345.63		666 Share Sale 09/28/04
2005	Stock	Found. Sale	07/25/05	-\$10,250.17	Nuvelo	\$44.0625	-\$44,062.50		1000 Share Sale 07/25/05
2006	Stock	Found. Sale	01/06/06	-\$3,413.31	Nuvelo	\$44.0625	-\$14,672.81		333 Share Sale 01/06/06
2006	Stock	Found. Sale	01/27/06	-\$5,125.08	Nuvelo	\$44.0625	-\$22,031.25		500 Share Sale 01/27/06
2008	Stock	Found. Sale	12/23/08	-\$23,814.56	Nuvelo	\$44.0625	-\$102,371.87		2323.3 Share Sale 12/23/08
1999	Reimain			\$0.00	0.00000		\$0.00	\$0.00	
1999	Stock	D. G. Brungard	12/17/99	\$10,250.17	Hyseq	\$52.5000	\$52,500.00		

D. G. Brungard Foundation - Donations

Date	Amount	Organization	For	Book \$/Share	fm.date
05/18/99	\$2,450.00	Northwestern University	Summer Music Internship		
12/27/99	\$3,500.00	Dance Alloy	Pattabhi Jais Documentary	52.5000	12/28/99
12/27/99	\$1,725.00	McHenry County Music Center	European Performance	135.0000	03/15/00
Tot 1999 Donations	\$7,675.00			360.7500	02/17/00
12/27/00	\$2,700.00	McHenry County Music Center	Operating Funds		
Tot 2000 Donations	\$2,700.00				
6/7/2001	\$139,600.00	Center for the Performing Arts	Building Fund 2667	shares Hyseq @	52.35
Tot 2001 Donations	\$139,600.00				
12/12/03	\$7,200.00	St. James Episcopal Church	Lunch Program		
Tot 2003 Donations	\$7,200.00				
12/17/04	\$4,000.00	Roosevelt University	Music Education Grant		
12/20/04	2,600.00	The Florence Symphony Orchestra	Music Education Grant		
Tot 2004 Donations	\$6,600.00				
08/15/05	\$4,000.00	Roosevelt University	Music Education Grant		
12/20/05	\$1,000.00	The Florence Symphony Orchestra	Music Education Grant		
12/27/05	\$3,000.00	Carolina Concert Association	Musical Instrument Grant		
Tot 2005 Donations	\$8,000.00				
11/28/06	\$1,500.00	The Florence Symphony Orchestra	Music Education Grant		
11/28/06	\$4,800.00	United Methodist Church	Lunch Program		
Tot 2006 Donations	\$6,300.00				
04/27/07	\$4,075.00	FSU Foundation	Music Education Grant		
11/14/07	\$4,000.00	Carolina Concert Association	Music Education Grant		
12/23/07	\$2,400.00	United Methodist Church	Lunch Program		
12/23/07	\$1,700.00	The Florence Symphony Orchestra	Music Education Grant		
Tot 2007 Donations	\$12,175.00				
03/23/08	\$1,700.00	The Florence Symphony Orchestra	Music Education Grant		
03/25/08	\$600.00	Carolina Concert Association	Musical Instrument Grant		
10/10/08	\$100.00	Gordon Cromwell Theological Seminary	RCC Education Fund		
Tot 2008 Donations	\$2,400.00				
03/23/09	\$200.00	Avon Foundation-Walk for Breast Cancer	Health Grant		
10/12/09	\$2,000.00	Charlotte Concerts	Musical Instrument Grant		
10/10/08	\$2,400.00	United Methodist Church	Lunch Program		
Tot 2009 Donations	\$4,600.00				

Reduction in Book Value
 (26,827.50)
 (225,000.00)
 (176,406.75)
 (\$428,234.25)

D. G. Brungard Foundation - Administrative Expenses

Date	Other Organization	For
'00 Operating Expenses:	08/18/00 Pers CAP Ck # 1065	Annual Report Filing Fee
	11/27/00 DGB Found Ck #1006	Annual Report Filing Fee
	Total Oper Expenses	
'01 Operating Expenses:	05/15/01 DGB Found Ck #1007	Annual Report Filing Fee
	11/29/01 DGB Found Ck #1008	Annual Report Filing Fee
	Total Oper Expenses	
'02 Operating Expenses:	05/25/02 DGB Found Ck #1009	Annual Report Filing Fee
	11/18/02 DGB Found Ck #1010	Annual Report Filing Fee
	Total Oper Expenses	
'03 Operating Expenses:	05/27/03 DGB Found Ck #1011	Annual Report Filing Fee
	11/20/03 DGB Found Ck #1013	Annual Report Filing Fee
	Total Oper Expenses	
'04 Operating Expenses:	06/10/04 DGB Found Ck #1014	Annual Report Filing Fee
	11/18/04 DGB Found Ck #1015	Annual Report Filing Fee
	Total Oper Expenses	
'05 Operating Expenses:	06/10/05 DGB Found Ck #1004	Annual Report Filing Fee
	11/18/05 DGB Found Ck #1006	Annual Report Filing Fee
	Total Oper Expenses	
'06 Operating Expenses:	06/10/06 DGB Found Ck #1007	Annual Report Filing Fee
	12/12/06 DGB Found Ck #1010	Annual Report Filing Fee
	Total Oper Expenses	
'07 Operating Expenses:	06/01/07 DGB Found Ck #1015	Annual Report Filing Fee
	10/29/07 DGB Found Ck #1016	Annual Report Filing Fee
	Total Oper Expenses	
'08 Operating Expenses:	05/28/08 DGB Found Ck #1021	Annual Report Filing Fee
	11/21/08 DGB Found Ck #1002 (new ckg acct)	Annual Report Filing Fee
	Total Oper Expenses	
'09 Operating Expenses:	05/15/09 DGB Found Ck #1004 (new ckg acct)	Annual Report Filing Fee
	11/22/09 DGB Found Ck #1006 (new ckg acct)	Annual Report Filing Fee
	Total Oper Expenses	

0.03125	12	1	0.29000	1	2	6.60000	2	2	5.30000	4	1	5.04000	5	1	9.85000	6	1	5.13000	7
0.06250	12	2	0.30000	1	5	6.40000	2	3	5.28000	4	2	5.42000	5	4	9.78000	6	2	4.82000	7
0.09375	12	3	0.30000	1	6	6.40000	2	4	5.10000	4	3	5.66000	5	5	10.00000	6	3	4.38000	7
0.12500	12	4	0.29000	1	7	6.40000	2	5	4.92000	4	6	5.87000	5	6	10.09000	6	4	4.44000	7
0.15625	12	5	0.30000	1	8	6.40000	2	6	4.50000	4	7	5.64000	5	7	10.35000	6	5	4.57000	7
0.18750	12	6	0.29000	1	9	6.40000	2	9	4.14000	4	8	5.84000	5	8	9.98000	6	8	4.07000	7
0.21875	12	8	0.30000	1	12	6.40000	2	10	5.71000	4	9	5.84000	5	11	11.61000	6	9	3.96000	7
0.25000	12	10	0.36000	1	13	6.40000	2	11	5.70000	4	13	5.65000	5	12	11.87000	6	10	3.90000	7
0.28125	12	11	0.32000	1	14	6.20000	2	12	3.97000	4	14	5.75000	5	13	12.66000	6	11	3.84000	7
0.31250	12	12	0.30000	1	15	6.20000	2	13	3.99000	4	15	5.69000	5	14	12.75000	6	12	3.90000	7
0.34375	12	15	0.30000	1	16	6.40000	2	17	3.90000	4	16	5.41000	5	15	13.45000	6	15	3.85000	7
0.37500	12	16	0.30000	1	20	5.80000	2	18	4.00000	4	17	5.58000	5	18	12.73000	6	16	3.59000	7
0.40625	12	17	0.31000	1	21	5.60000	2	19	4.00000	4	20	5.50000	5	19	12.59000	6	17	3.27000	7
0.43750	12	18	0.32000	1	22	5.60000	2	20	4.07000	4	21	6.00000	5	20	11.49000	6	18	3.06000	7
0.46875	12	19	0.31000	1	23	5.60000	2	23	4.07000	4	22	6.29000	5	21	9.00000	6	19	2.94000	7
0.50000	12	22	0.32000	1	26	5.00000	2	24	4.05000	4	23	7.34000	5	22	8.63000	6	22	2.65000	7
0.53125	12	23	0.33000	1	27	4.40000	2	25	4.05000	4	24	9.24000	5	26	8.91000	6	23	2.58000	7
0.56250	12	24	0.33000	1	28	4.45000	2	26	4.11000	4	27	10.00000	5	27	9.35000	6	24	2.87000	7
0.59375	12	26	0.31000	1	29	4.60000	2	28	4.10000	4	28	9.54000	5	28	9.32000	6	25	2.90000	7
0.62500	12	29	0.32000	1	30	5.05000	2	27	4.24000	4	29	9.65000	5	29	9.29000	6	26	2.92000	7
0.65625	12	30	0.31000					3	4.81000	4	30	9.60000				6	29	3.03000	7
0.68750	12	31	0.31000	1/1/09=				3	5.02000	4						6	30	3.20000	7

= Rev Split 1:20

0.71875	11	10	03	18,000	18,667	17,000 (a)	5%	15,509	\$775	15,255	\$763	13,938	\$697	14,600	\$730	17,325	\$866	15,969	\$798
0.75000	9	28	04	17,333	18,000	20,000		15,509	\$775	15,255	\$763	13,938	\$697	14,600	\$730	17,325	\$866	15,969	\$798
0.81250	2	17	00	18,333	18,000	20,000		15,509	\$775	15,255	\$763	13,938	\$697	14,600	\$730	17,325	\$866	15,969	\$798
0.84375	3	15	00	17,511	18,333	20,000		15,509	\$775	15,255	\$763	13,938	\$697	14,600	\$730	17,325	\$866	15,969	\$798
0.87500	5	16	02	17,511	18,333	20,000		15,509	\$775	15,255	\$763	13,938	\$697	14,600	\$730	17,325	\$866	15,969	\$798
0.90625	11	10	03	17,511	18,333	20,000		15,509	\$775	15,255	\$763	13,938	\$697	14,600	\$730	17,325	\$866	15,969	\$798
0.93750	7	25	05	16,333	18,333	20,000		15,509	\$775	15,255	\$763	13,938	\$697	14,600	\$730	17,325	\$866	15,969	\$798
0.96875	1	6	06	16,333	18,333	20,000		15,509	\$775	15,255	\$763	13,938	\$697	14,600	\$730	17,325	\$866	15,969	\$798
	1	27	08	16,000	18,333	20,000		15,509	\$775	15,255	\$763	13,938	\$697	14,600	\$730	17,325	\$866	15,969	\$798
	12	23	08	15,500	18,333	20,000		15,509	\$775	15,255	\$763	13,938	\$697	14,600	\$730	17,325	\$866	15,969	\$798
				2,667	18,667	17,000 (a)	5%	15,509	\$775	15,255	\$763	13,938	\$697	14,600	\$730	17,325	\$866	15,969	\$798
				This vs Ln 36															
				Mo End Ave															
				5%															
				This vs Ln 31															
				202.63	102.63	4,673.98		4,673.98		4,673.98		4,673.98		4,673.98		4,673.98		4,673.98	
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167	16.647		16.642	\$832	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913	18,269	\$913
				3.20000	6.24167														

