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

OMB No 1545-0052

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 cal	endar year 2009, or tax year beginning	, 2009, and ending	g ,
G Che	eck all that apply Initial return Initia	al Return of a former public charity	Final return
	Amended return	Address change	Name change
Use th	ne		A Employer identification number
IRS lab		nc.	36-4540423
Otherw print	TI.O. DOM IL		B Telephone number (see the instructions)
or typ See Spe	e.		C If avantage analysis are analysis about here.
Instructi			C If exemption application is pending, check here D 1 Foreign organizations, check here
H C	heck type of organization   X   Section 501	(c)(3) exempt private foundation	2 Foreign organizations meeting the 85% test, check
ř	Section 4947(a)(1) nonexempt charitable to		dation here and attach computation
	ar market value of all assets at end of year J Acc		ccrual E If private foundation status was terminated under section 507(b)(1)(A), check here.
(f	from Part II, column (c), line 16)	Other (specify)	F If the foundation is in a 60-month termination
<u>► \$</u>		column (d) must be on cash basis	under section 507(b)(1)(B), check here
Part I	Analysis of Revenue and		nvestment (c) Adjusted net (d) Disbursements
	Expenses (The total of amounts in columns (b), (c), and (d) may not neces-	expenses per books inco	ome income for charitable purposes
	sarily equal the amounts in column (a)		(cash basis only)
	(see the instructions) )  1 Contributions, gifts, grants, etc. received (att sch)	2,214,000.	<del></del>
	2 Ck I if the foundn is <b>not</b> req to att Sch B	2/221/0001	
	3 Interest on savings and temporary	244	244. 244.
	cash investments 4 Dividends and interest from securities	244.	244.
	5a Gross rents		
	b Net rental income or (loss)		·
Ŗ	6 a Net gain/(loss) from sale of assets not on line 10		
E V	b Gross sales price for all assets on line 6a		
E N	7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain		
U	9 Income modifications		
E	10 a Gross sales less returns and		
	allowances b Less Cost of		
	goods sold.		
	c Gross profit/(loss) (att sch)  11 Other income (attach schedule)		<del></del>
	See Statement 1	8,680.	
	12 Total. Add lines 1 through 11	2,222,924.	244. 244.
	13 Compensation of officers, directors, trustees, etc	0.	
	14 Other employee salaries and wages		
	15 Pension plans, employee benefits		
A	b Accounting lees (attach schedule)	2,000.	2,000. 2,000.
M I	c Other prof fees (attach seh)		27000.
0 I	17 Interest -	0 0 0	
MAZZ BZZIMBAGO	18 Taxes (attach superily xsee MAY 18 2010	Q .	
	19 Depreciation (attach sch) and deptetion	R	
72	20 Occupancy OGDEN UT	=	
OS È	21 Travel, conferences, and meetings		
N X	22 Printing and publications		
<b>登</b> E	23 Other expenses (attach schedule)		
≥≥, N S	24 Total operating and administrative		
	expenses. Add lines 13 through 23	2,000.	2,000. 2,000.
SCANNED	25 Contributions, gifts, grants paid Part XV	380,000.	380,000
3	26 Total expenses and disbursements. Add lines 24 and 25	382,000.	2,000. 2,000. 380,000
6	27 Subtract line 26 from line 12:		2,000.
Ö	a Excess of revenue over expenses	1 940 934	
Ø	and disbursements	1,840,924.	0.
	D Net investment income (if negative, enter 0).  C Adjusted net income (if negative, enter -0-)		0.
BAA F	or Privacy Act and Paperwork Reduction Ac	t Notice, see the instructions.	TEEA0504L 02/02/10 Form 990-PF (2009

Dad	<del></del>	Palanca Chasta	Attached schedules and amounts in the description	Beginning of year	End	of year
Part	اللا,	Balance Sheets	column should be for end-of year amounts only (See instructions )	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest	-bearing			
	2	Savings and tempor	ary cash investments	7,958.	1,848,882.	1,848,882.
	3	Accounts receivable	<b>-</b>		•	
		Less allowance for	doubtful accounts ►			
	4	Pledges receivable	<b>&gt;</b>		•	
		Less allowance for	doubtful accounts ►			
	5	Grants receivable				
	6	Receivables due from offi disqualified persons (atta	cers, directors, trustees, and other ch schedule) (see the instructions)			
_	7	Other notes and loans rec	eivable (attach sch)	]		
A S		Less allowance for	doubtful accounts ►			
Š	8	Inventories for sale	or use			ļ
A S E T	9	Prepaid expenses a	nd deferred charges		······································	<u> </u>
Ś	10 a	Investments – US obligations (attach s	and state government chedule)		<del></del>	
	l t	Investments — corporate	stock (attach schedule)			
	0	: Investments — corporate	bonds (attach schedule)			
	11	Investments – land, equipment basis	buildings, and			
		Less accumulated deprec (attach schedule)	,			
	12	Investments – mort		t		
	13	Investments - other		664,420.	664,420.	664,420.
	14	Land, buildings, and e Less accumulated depred		1		
		(attach schedule)	· · · · · · · · · · · · · · · · · · ·			
		Other assets (descri <b>Total assets</b> (to be see instructions. Als	be) completed by all filers — o, see page 1, item I)	672,378.	2,513,302.	2,513,302.
	17		nd accrued expenses	1		1 2/020/0001
Ĭ	18	Grants payable		[		1
A B	19	Deferred revenue				1
- !	20	Loans from officers, direc	tors, trustees, & other disqualified persons .			
ī	21	Mortgages and other note	s payable (attach schedule)			
Ţ	22	Other liabilities (descri	ribe •)			
Ė S	23		lines 17 through 22)	0.	0.	
		Foundations that fo and complete lines	llow SFAS 117, check here 24 through 26 and lines 30 and 31.			
NF	24	Unrestricted				
N F E U T N	25	Temporarily restricted	ed			]
D	26	Permanently restrict				
A B A L A		Foundations that do and complete lines	o not follow SFAS 117, check here $ ightharpoonup$ Z7 through 31.			} }
EL	27	Capital stock, trust p	principal, or current funds			
SM	28	Paid-in or capital surplus	or land, building, and equipment fund			]
OE	29	Retained earnings, accum	ulated income, endowment, or other funds	672,378.	2,513,302.	]
ŔŚ	30 31		fund balances (see the instructions) net assets/fund balances	672,378.	2,513,302.	-
-	<u> </u>	(see the instructions		672,378.	2,513,302.	<u> L</u>
Part	111 /	Analysis of Chan	ges in Net Assets or Fund Balanc	es	· · · · · · · · · · · · · · · · · · ·	
1	Total end-c	net assets or fund b	alances at beginning of year – Part II, colu d on prior year's return)	umn (a), line 30 (must ag	ree with	672,378.
2	Enter	r amount from Part I,	line 27a		2	1,840,924.
3	Other	increases not included in li	ne 2 (Itemize)		3	
4	Add I	ines 1, 2, and 3		<del>_</del> .	4	2,513,302.
		ises not included in line 2 (			5	
6	Total	net assets or fund b	alances at end of year (line 4 minus line 5)	) – Part II, column (b), lii	ne 30 <b>6</b>	2,513,302.
BAA			TEEA0302L	07/06/09		Form <b>990-PF</b> (2009)

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Form 990-PF (2009) The Ina Kay Foundation, Inc.

(a) List and de	scribe the kind(s) of property sold (e.g., rehouse; or common stock, 200 shares ML	eal estate, C Company)	b) How acquired P — Purchase D — Donation	(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a N/A	, t = 1				
b					
С					
d					
е					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	,	(h) Gain or (e) plus (f) m	
а					
b					
С					<del>.</del>
d					·
e					
	showing gain in column (h) and owned by			(I) Gains (Col	
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i over column (j), if any		gain minus column ( han -0-) <b>or</b> Losses (f	
<u>a</u> b					
c					
d					
e					
2 Capital gain net income o	r (net capital loss).  If gain, also if (loss), en	enter in Part I, line 7 ter -0- in Part I, line 7	2		
3 Net short-term capital gai	n or (loss) as defined in sections 1222(5)	_	<del></del>	·   · ·	
		7			
in Part I, line 8	I, line 8, column (c) (see the instructions)	ir (loss), enter -u-	3	ļ	
	nder Section 4940(e) for Reduce	d Tax on Net Investmen	nt Income		
If 'Yes,' the foundation does no	e section 4942 tax on the distributable and qualify under section 4940(e) Do not co	mplete this part		Yes	X No
	ount in each column for each year, see th		any entries	(-1)	
<b>(a)</b> Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	(c) Net value of noncharitable-use asse	ets (co	<b>(d)</b> Distributio Dlumn (b) divided	
2008	420,000.	737	, 238.		0.569694
2007	273,447.	8,585	, 998.		0.031848
2006	148,241.	5,802	, 453.		0.025548
2005	26,618.	3,132	,008.		0.008499
2004	500.	604	,157.	_	0.000828
					0 (26417
2 Total of line 1, column (d		stal on line 2 by E. or by the	2		0.636417
3 Average distribution ratio number of years the found	for the 5-year base period – divide the to dation has been in existence if less than 5	5 years	3		0.127283
4 Enter the net value of nor	ncharitable-use assets for 2009 from Part	X, line 5	4		989,354.
5 Multiply line 4 by line 3			5		125,928.
6 Enter 1% of net investme	nt income (1% of Part I, line 27b)		6		
7 Add lines 5 and 6			7		125,928.
8 Enter qualifying distribution	ons from Part XII, line 4		8		380,000.
, , ,	ater than line 7, check the box in Part VI,	line 1b, and complete that pa	art using a 1	% tax rate See	

Form	<b>990-PF</b> (2009) The Ina Kay Foundation, Inc. 36-4540423		F	Page 4
Parl	VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see the instruction	ctions)		
1 a	Exempt operating foundations described in section 4940(d)(2), check here			-
	Date of ruling or determination letter: (attach copy of letter if necessary · see instr.)			
` b	Domestic foundations that meet the section 4940(e) requirements in Part V,			0.
	check here ► X and enter 1% of Part I, line 27b			
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b).			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable			
2	foundations only Others enter -0-)			0.
3	Add lines 1 and 2			0.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			0.
6	Credits/Payments.			
а	2009 estimated tax pmts and 2008 overpayment credited to 2009			
	Exempt foreign organizations — tax withheld at source 6b			
	Tax paid with application for extension of time to file (Form 8868).			
	Backup withholding erroneously withheld			
7	Total credits and payments Add lines 6a through 6d			0.
8	Enter any penalty for underpayment of estimated tax. Check here			<u> </u>
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			0.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.			<u> </u>
	Enter the amount of line 10 to be Credited to 2010 estimated tax			
	VII-A Statements Regarding Activities			
			Yes	No
1 a	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?	1a	103	X
t	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	1 b		x
	If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year?	1c		Х
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			
	(1) On the foundation $\Rightarrow$ 0. (2) On foundation managers $\Rightarrow$ 0.	.]		
€	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on			1
_	foundation managers \$ 0.	,		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		X
	If 'Yes,' attach a detailed description of the activities			1
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes	3		х
4 a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		Х
t	If 'Yes,' has it filed a tax return on Form 990-T for this year?	4b	N	/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		X
	If 'Yes,' attach the statement required by General Instruction T			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			
	By language in the governing instrument, or			l
	<ul> <li>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?</li> </ul>	6	Х	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	7	X	
	Enter the states to which the foundation reports or with which it is registered (see the instructions)			[
	MD			
	off the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General			1
_	(or designate) of each state as required by General Instruction G <sup>2</sup> If 'No,' attach explanation	8ъ	_X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5)			
3	for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If 'Yes,' complete Part XIV	9		Х
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses.  See Statement 3	10	x	

Form	n <b>990-PF</b> (2009) The Ina Kay Foundation, Inc.	36-454042	23	Page <b>5</b>
Par	t VII-A Statements Regarding Activities Continued			
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)		11	x
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?		12	x
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption Website address  N/A	n application?	13	х
14	The books are in care of ► Lauren Pollin Telephone	no ►		
	Located at ► same as above ZIP + 4 ►			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here	-11	N/A	▶ 🔲
<u></u>	and enter the amount of tax-exempt interest received or accrued during the year	▶ 15		N/A
Par	t VII-B   Statements Regarding Activities for Which Form 4720 May Be Required		<del>                                     </del>	Vaal Na
_	File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.		-	Yes No
1 8	a During the year did the foundation (either directly or indirectly)	□v VIII-	1 1	
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes X No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes X No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No	1 1	
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes X No		
			1 1	
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	Yes X No		
	(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days )	Yes X No		
ı	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 the instructi	ons)?	1 b	N/A
	Organizations relying on a current notice regarding disaster assistance check here	▶ [_]		
•	c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
;	a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	Yes X No		
	If 'Yes,' list the years ▶ 20, 20, 20			
I	b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942 (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942 all years listed, answer 'No' and attach statement — see the instructions)	?(a)(2) (a)(2) to	2 b	N/A
	c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years	here.		<del>-   -  </del>
•	► 20 , 20 , 20 , 20			
_	a Did the foundation hold more than a 2% direct or indirect interest in any business			
3	enterprise at any time during the year?	Yes X 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 approve 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)	ed	3ь	N/A
4:	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	X
	<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?		4b	X
BAA	A	F	orm <b>990</b>	<b>)-PF</b> (2009)

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Part VII-B   Statements Regarding Activiti	es for Which Form	1 4720 May Be Req	uired (continued)		
5a During the year did the foundation pay or incu	r any amount to				
(1) Carry on propaganda, or otherwise attempt	ot to influence legislation	on (section 4945(e))?	∐ Yes X	No	1 1
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	ition drive?			No	
(3) Provide a grant to an individual for travel,	study, or other similar	purposes?	Yes X	No	] ]
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	nan a charitable, etc. o 4940(d)(2)? (see instri	rganization described uctions)	Yes X	No	
(5) Provide for any purpose other than religio educational purposes, or for the preventio	us, charitable, scientific n of cruelty to children	c, literary, or or animals?	Yes X	No	
<b>b</b> If any answer is 'Yes' to 5a(1)-(5), did <b>any</b> of described in Regulations section 53 4945 or in (see instructions)?	the transactions fail to a current notice regar	qualify under the excep ding disaster assistance	tions	5 b	N/A
Organizations relying on a current notice rega	rding disaster assistani	ce check here	▶ [		
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon If 'Yes,' attach the statement required by Regi	sibility for the grant?		N/A Yes	] No	
6a Did the foundation, during the year, receive ar on a personal benefit contract?	ny funds, directly or ind	directly, to pay premium	s Yes X	No	
<b>b</b> Did the foundation, during the year, pay premi	iums, directly or indirec	ctly, on a personal bene		бь	X
If 'Yes' to 6b, file Form 8870				1	
7a At any time during the tax year, was the found				No 76	NT / 2
b If yes, did the foundation receive any proceed  Part VIII Information About Officers, Di				7b	
and Contractors					
1 List all officers, directors, trustees, foundation	n managers and their	compensation (see inst	ructions).		
(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		se account, lowances
See Statement 4				1	
		0.	0.		0.
2 Compensation of five highest-paid employee	s (other than those in	cluded on line 1— see ir	structions). If none. e	nter '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) Expens	se account, lowances
None					
	-				
		<u> </u>			
Total number of other employees paid over \$50,000	) TEE 003061 /	07/06/09	-	1	0 0-PF (2009)

Form 990-PF (2009) The Ina Kay Foundation, Inc. 36-454  Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid E and Contractors (continued)	
3 Five highest-paid independent contractors for professional services — (see instructions). If none, enter 'NONE.'	
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
None	(c) compensation
222222222222222222222222222222222222222	
Total number of others receiving over \$50,000 for professional services	0
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	Expenses
organizations and other beneficiaries served, conferences convened, research papers produced, etc.	·
1 <u>N/A</u>	
2	
3	†
	1
4	
	<u> </u>
Part IX-B Summary of Program-Related Investments (see instructions)	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 <u>N/A</u>	
2	
All other program-related investments. See instructions	
3	
Total. Add lines 1 through 3	0.
BAA	Form <b>990-PF</b> (2009)

Form <b>990-PF</b> (2009) The Ina Kay Foundation, Inc.	36 <u>-454042</u>	3 Page
Part X   Minimum Investment Return (All domestic foundations must complete this part. see instructions.)	Foreign fou	ndations,
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	1 a	
<b>b</b> Average of monthly cash balances	1 b	340,000.
c Fair market value of all other assets (see instructions)	1 c	664,420.
d Total (add lines 1a, b, and c)	1 d	1,004,420.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c		
(attach detailed explanation).	).	
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	1,004,420.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	15,066.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	989,354.
6 Minimum investment return. Enter 5% of line 5	6	49,468.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operand certain foreign organizations check here ► and do not complete this		idations
1 Minimum investment return from Part X, line 6	1	49,468.
2a Tax on investment income for 2009 from Part VI, line 5		
b Income tax for 2009 (This does not include the tax from Part VI).	$\exists$	
c Add lines 2a and 2b	2 c	
3 Distributable amount before adjustments Subtract line 2c from line 1	3	49,468.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	49,468.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	49,468.
Part XII Qualifying Distributions (see instructions)		
1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:  a Expenses, contributions, gifts, etc — total from Part I, column (d), line 26	1 a	380,000.
<b>b</b> Program-related investments — total from Part IX-B	1 b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the a Suitability test (prior IRS approval required)	3a	
<b>b</b> Cash distribution test (attach the required schedule).	3b	
4 Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	380,000.
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 instructions).	5	

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

BAA

Adjusted qualifying distributions. Subtract line 5 from line 4

Form **990-PF** (2009)

380,000.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	<b>(c)</b> 2008	<b>(d)</b> 2009
Distributable amount for 2009 from Part XI, line 7				49,468.
2 Undistributed income, if any, as of the end of 2009:				19, 400.
a Enter amount for 2008 only			36,034.	
<b>b</b> Total for prior years 20, 20, 20		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
<b>b</b> From 2005			-	
c From 2006				•
<b>d</b> From 2007				
e From 2008	0			
f Total of lines 3a through e.  4. Ovalytima distributions for 2000 from Bart	0.			
4 Qualifying distributions for 2009 from Part XII, line 4 ► \$ 380,000.				
a Applied to 2008, but not more than line 2a			36,034.	
			30,034.	·
<b>b</b> Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required – see instructions)	0.			
d Applied to 2009 distributable amount				49,468.
e Remaining amount distributed out of corpus	294,498.			
5 Excess distributions carryover applied to 2009	0.			0.
(If an amount appears in column (d), the		·		
same amount must be shown in column (a) )				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	294,498.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistribut-		, ,		
ed income for which a notice of deficiency				
has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable				
amount — see instructions.		0.		
e Undistributed income for 2008. Subtract line 4a from				
line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2009 Subtract lines				
4d and 5 from line 1. This amount must be				0
distributed in 2010 7 Amounts treated as distributions out of				0.
corpus to satisfy requirements imposed				
by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
, , , , , , , , , , , , , , , , , , ,	<u> </u>			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	294,498.			
10 Analysis of line 9				
a Excess from 2005				
<b>b</b> Excess from 2006				
c Excess from 2007				
d Excess from 2008.				
e Excess from 2009 294, 498.				

Part XIV   Private Operating Foundations (see instructions and Part VIII-A, question 9)   N/A	Form 990-PF (2009) The Ina Kay Found				36-4540423	
s effective for 2009, enter the date of the ruing.  b Check hox to indicate whether the foundation is a private operating foundation described in section.  4942()(5) or 4942()(5)  2 a Enter the lesser of the adjusted net income from Part 1 or the minimum reach year listed.  58% of the 2a  Coughtying distributions from Part X for each year listed.  4 Pareutis reliable in the 2 roll used directly for active cancel respectively.  Coughtying distributions made directly for active reach year listed.  4 Areutis reliable in the 2 roll used directly for active reach year listed.  5 Cauthying distributions made directly for active reach year listed.  6 Qualifying distributions made directly for active reach year listed.  6 Cauthying distributions made directly for active reach year listed.  7 Cauthying distributions made directly for active reach year listed.  8 Cauthying distributions made directly for active reach year listed.  9 Cauthying distributions made directly for active reach year listed.  9 Cauthying distributions made directly for active reach year listed.  9 Cauthying distributions made directly for active reach year listed.  9 Cauthying distributions made directly for active reach year listed.  10 Yalve of all assets.  10 Yalve of all assets.  11 Yalve of all assets.  12 Yalve of all assets.  12 Yalve of all assets.  13 Camplete Ja, b. or, c for the alternative lest – enter 273 of minimum reaches that share in Fax, minimum reaches and the properties of the reaches of the properties of the properties of the reaches of the properties of the properti		<del></del>				<u> N/A</u>
2.a Enter the lesser of the adjusted net income from Part I or he minimum investment return from Part X for the minimum investment return from Part X for the minimum investment return from Part X for the part of the minimum investment return from Part X for the SSK of the 2a causality of the Call and the SSK of the 2a causality of the Call and the SSK of the Call and	is effective for 2009, enter the date of the	ruling				
income from Part I or the minimum investment return from Part X for more control of exempt activates and a format in the part of the part X for more of the stock of a comparison of the foundation before the section of section of section of section of section for a format in the part of the part X format X fo	<ul> <li>b Check box to indicate whether the foundat</li> </ul>	tion is a private op	erating foundation of	described in section	4942(j)(3) or	4942(j)(5)
investment return from Part X for each year isled b 85% of line 2a Couplifying distributions from Part XII, line 4 for each year listed d Arounts returned as large to return distributions made directly for achieve conduct of exempt activities Subtract line 2d from line 2c Couplifying distributions made directly for achieve conduct of exempt activities Subtract line 2d from line 2c Couplifying distributions made directly for achieve conduct of exempt activities Subtract line 2d from line 2c Coupling a distribution activities Subtract line 2d from line 2c Coupling a distribution activities Subtract line 2d from line 2c Coupling a distribution activities Subtract line 2d from line 2c Coupling a distribution activities Subtract line 2d from line 2c Coupling and line activities Subtract line 2d from line 2c Coupling and line activities Subtract line 2d from line 2c Coupling and line activities Subtract line 2d from line 2c Coupling and line activities Subtract line 2d from line 2c Coupling and line activities Subtract line 2d from line 2c Coupling and line activities Subtract line 2d from line 2c Coupling and line activities Subtract line 2d from line 2c Coupling and line activities Subtract line 2d from line 2c Coupling and line activities Subtract line 2d from line 2c Coupling and line activities Subtract line 2d from line 2c Coupling and line 2c Coupling and line 2c Coupling activities Subtract line 2c Coupling and line 2c Coupling activities Subtract line 2c Coupling and line 2c Coupling activities Subtract line 2c Coupling activities Subtr				1		
c Cualifying distributions from Part XII, line 4 for each year Islad d Amounts included in line 2 for each year Islad of Carbotter Studies of Carbotter Stud	investment return from Part X for	(a) 2009	<b>(b)</b> 2008	(c) 2007	(d) 2006	(e) Total
time 4 for each year isted d Amounts included aline 2 not said directly to active conduct of exempt activities  Qualifying distributions made directly to active conduct of exempt activities 3 complete 3b, to r to fee the distribution of active conduct of exempt activities 3 complete 3b, to r to fee the distribution of activities 3 complete 3b, to r to fee the distribution of activities 4 complete 3b, to r to fee the distribution of activities 5 complete 3b, to r to fee the distribution of activities 6 complete 3b, to r to fee the distribution of activities 6 complete 3b, to r to fee the distribution of activities 6 complete 3c, to activities 7 complete 3c, to activities 8 complete 3c, to activities 8 complete 3c, to activities 9 co	<b>b</b> 85% of line 2a		<b>1</b>	<u> </u>		
for active conduct of exempt activities  Qualifying distributions made directly for active conduct of exempt activities Subtract the 2d from line 2 and from line 2d from line 2  3 Complete 3a, b, or for the alternative test reled upon a Assets' alternative test - enter (1) Value of assets againlying under section 9422(0)(3(9)) b Endowment alternative test - enter 2/3 d, line 6 for each year listed  C Support' alternative test - enter (1) Total support from an exemption of the support of the stock of a controlled support of the from a gross investment income (interest, dividends, rents, payments on securities biants (section 512(0/5)), or royalties as growed  (3) Largest amount of support from an exempt organization as growed  (4) Gross investment income  Part XV   Supportment in come  Part XV   Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year - see instructions.)  1 Information Regarding Foundation Managers: 1 List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the controlled and the second 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 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 contributed more than 50.000 (See section 507(0)(2))  A The name, address, and telephone number of the person to whom applications should be addressed  5 Information Regarding Contribution only makes contribution only makes contribution on the factors of managers of the foundation only makes contributions to preselected charitable organizations under other conditions, complete terms 2a, b, c, and d  a The name, address, and t	c Qualifying distributions from Part XII, line 4 for each year listed					
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See Statement 5 b The form in which applications should be submitted and information and materials they should include  See Statement for Line 2a c Any submission deadlines  See Statement for Line 2a d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors	Check here I If the foundation only requests for funds. If the foundation make	nakes contribution	s to preselected cha	arıtable organization		•
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c Any submission deadlines  See Statement for Line 2a  d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors	<b>b</b> The form in which applications should be	submitted and info	rmation and materia	als they should incl	ude	
See Statement for Line 2a  d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors	See Statement for Line 2a					
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors	c Any submission deadlines					<del></del>
	See Statement for Line 2a					
See Statement for Line 2a		such as by geogra	phical areas, charita	ible fields, kinds of	institutions, or other	factors
	See Statement for Line 2a					

3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient show any relationship to any foundation manager or substantial contributor Purpose of grant or contribution status of Amount recipient Name and address (home or business) a Paid during the year Hadassah 501c3 For the charitable 380,000. none 50 West 58 Street purposes of New York, NY 10019, recipient organization. 3a 380,000. Total **b** Approved for future payment Total 3Ь

Enter gross amounts unless otherwise indicated	Unrelated I	business income	Excluded by	section 512, 513, or 514	
• 8	(a) Business code	<b>(b)</b> Amount	(c) Exclu- sion	<b>(d)</b> Amount	(e) Related or exempt function income
1 Program service revenue:	<del></del>		code	<del></del>	(see the instructions)
<u>a</u>			+		
b	<del></del>	<del></del>	<del> </del>		
С					
d			+		
e					
f			+		·-·
g Fees and contracts from government agencies	-		<del>                                     </del>		
2 Membership dues and assessments	-		<del>                                     </del>		
3 Interest on savings and temporary cash investments	-		14	244.	
4 Dividends and interest from securities			<del>                                     </del>	<del> </del>	
5 Net rental income or (loss) from real estate			<del></del>		
a Debt-financed property	<u> </u>		· <del>  </del>		
<b>b</b> Not debt-financed property			<del></del>	<del></del>	
6 Net rental income or (loss) from personal property.	<del></del>		<del></del>		<u> </u>
7 Other investment income			+-+		
8 Gain or (loss) from sales of assets other than inventory	<del></del>		+		· · · · · · · · · · · · · · · · · · ·
9 Net income or (loss) from special events	<del></del>		<del></del>	<u> </u>	
10 Gross profit or (loss) from sales of inventory			<del></del>		
11 Other revenue	<del></del>		18	8,680.	
a Tax Refund		··	10	0,000.	
<b>b</b>	+		<del></del>		
C			<del></del>		
d	<del></del>		+ +		
e	<del>                                     </del>		+	8,924.	
13 Total. Add line 12, columns (b), (d), and (e)	L	·	<del>-                                    </del>	13	8,924
	, aalaulations \			13	0,724
(See worksheet in the instructions for line 13 to verify	calculations )				

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See the instructions)
N/A_	
···	

(301)

Phone no

984-6400

Form 990-PF (2009)

Form 990-PF (2009) The Ina Kay Foundation, Inc 36-4540423 Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations** Yes No Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? a Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash 1 a (1) (2) Other assets 1 a (2) **b** Other transactions. (1) Sales of assets to a noncharitable exempt organization. 16(1) (2) Purchases of assets from a noncharitable exempt organization 1b(2) (3) Rental of facilities, equipment, or other assets 1 b (3) (4) Reimbursement arrangements 1b(4) (5) Loans or loan guarantees 1 b (5) (6) Performance of services or membership or fundraising solicitations 1 b (6) c Sharing of facilities, equipment, mailing lists, other assets, or paid employees d If the answer to any of the above is 'Yes,' complete the following schedule Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation if the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received (a) Line no. (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements N/A 2 a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations XNo described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? b If 'Yes,' complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship N/A Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge. -/d-/o ignature of officer or trustee Date GN Preparer's Identifying number (See Signature in the instrs) Date Check if Preparer's Paid Presignature employed Mancusø & Jones, parer's Use Har/Iton/ Firm's name (or yours if self-employed), address, and 11140 Rockville Pike

Only

BAA

ZIP code

Rockville,

MD

20852

### 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		Employer identification number		
The Ina Kay Foundation, Inc.		36-4540423		
Organization type (check one)				
Filers of:	Section:			
Form 990 or 990-EZ	501(c)() (enter number) organization 4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation			
	527 political organization			
	W			
Form 990-PF	X 501(c)(3) exempt private foundation			
4947(a)(1) nonexempt charitable trust treated as a private foundation				
	501(c)(3) taxable private foundation			
	101			
Check if your organization is covered by the <b>Ge Note:</b> Only a section 501(c)(7), (8), or (10) organization	eneral Rule or a Special Rule anization can check boxes for both the General Rule and a	Special Rule See instructions		
, , , , , , , , , , , , , , , , , , , ,		·		
General Rule –				
X For an organization filing Form 990, 990-EZ	Z, 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 –				
	orm 990 or 990-EZ, that met the 33-1/3% support test of to the contributor, during the year, a contribution of the greater of			
amount on (i) Form 990, Part VIII, line 1h o	or (ii) Form 990-EZ, line 1 Complete Parts I and II	(1) \$5,000 or (2) 2% or the		
For a section $501(c)(7)$ , (8), or (10) organiz	ation filing Form 990 or 990-EZ, that received from any or	e contributor, during the year.		
aggregate contributions of more than \$1,00 prevention of cruelty to children or animals	O for use exclusively for religious, charitable, scientific, lite	erary, or educational purposes, or the		
'	•			
For a section 501(c)(/), (8), or (10) organiz	ation filing Form 990 or 990-EZ, that received from any or is, charitable, etc. purposes, but these contributions did no	e contributor, during the year, at aggregate to more than \$1,000. If		
this box is checked, enter here the total cor	ntributions that were received during the year for an exclu-	sively religious, charitable, etc.		
	unless the General Rule applies to this organization becau	use it received nonexclusively		
religious, charitable, etc, contributions of \$5	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 S	Schedule B (Form 990, 990-EZ, or		
990-PF) but it <b>must</b> answer 'No' on Part IV, line 990-PF, to certify that it does not meet the film	e 2 of their Form 990, or check the box on line H of its Foi g requirements of Schedule B (Form 990, 990-EZ, or 990-	m 990-EZ, or on line 2 of its Form PF)		
BAA For Privacy Act and Paperwork Reduction		ule B (Form 990, 990-EZ, or 990-PF) (2009)		
for Form 990, 990EZ, or 990-PF.	on act notice; see the instructions	are & (1 01111 330, 330-122, 01 330-11 ) (2003)		

Schedule	<b>B</b> (Form 990, 990-EZ, or 990-PF) (2009)	Pa	age 1		of Part I
Name of org	anization na Kay Foundation, Inc.			identification number	
Part I	Contributors (see instructions )	<u>-</u>	<u> </u>		
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contribution	, ns	(d) Type of contri	bution
<u>1</u> (a)	Silver Spring, MD 20910,	\$2,214,		Person X Payroll Noncash (Complete Part is a noncash con	ntribution )
Number	Name, address, and ZIP + 4	Aggregate contribution	ns	Person Payroll Noncash (Complete Part is a noncash con	II if there
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributio	ns	(d) Type of contri	bution
;		  \$		Person Payroll Noncash (Complete Part is a noncash com	II if there atribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contribution	; ns	(d) Type of contri	bution
		\$		Person Payroll Noncash (Complete Part is a noncash con	II if there ntribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributio	ns	(d) Type of contri	bution
		\$		Person Payroll Noncash (Complete Part is a noncash con	
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contribution	ns	(d) Type of contri	bution
		  \$		Person Payroli Noncash	

(Complete Part II if there is a noncash contribution )

BAA

Part I

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

	(Form 990, 990-EZ, or 990-PF) (2009)		<u>-</u>	age 1	or 1	of Part III	
Name of organ					Employer identificati		
Part III	a Kay Foundation, Inc.  Exclusively religious, charitable, e	to individual contributio	no to costi	on 501(c)	36-4540423 (7) (8) or (10)		
Partin	organizations aggregating more th	te, individual contribution an \$1.000 for the vear.(Co	omplete cols (	(a) through	(7), (6), Or (10) (e) and the following	na line entry )	
		<del>-</del>			(-,	ig mic chary /	
	For organizations completing Part III, enter contributions of \$1,000 or less for the year	(Enter this information once —	see instruction	ns.)	<b>►</b> \$	N/A	
(a)	(b)	(c)			(d)		
No. from Part I	Purpose of gift	Use of gift		Desc	cription of how gift	is held	
	N/A					· · · · · · · · · · · · · · · · · · ·	
		(a)				<del></del>	
	(e) Transfer of gift						
				telationship of transferor to transferee			
		· · · · · · · · · · · · · · · · · · ·			····		
(a)	(b)	(c)			(d)		
No. from	Purpose of gift	Use of gift		Desc	cription of how gift	t is held	
Part I							
		(e) Transfer of gift					
	Transferee's name, addres		Rela	Relationship of transferor to transferee			
	1-						
(a)	(b)	(c)		. —	(d)		
No. from	Purpose of gift	Use of gift		Desc	cription of how gift	t is held	
Part I		-			<u> </u>		
		· · ·					
					<del></del>	<del></del>	
		(e)					
	Transferee's name, addres	Transfer of gift is. and ZIP + 4	Rela	tionship of	transferor to trans	sferee	
				<u> </u>		<del></del>	
		-					
	(b)	(c)			(d)		
(a) No. from	Purpose of gift	Use of gift		Desc	ري) cription of how gift	t is held	
Part I	- Composition g						
				<del>.</del>		-	
	<u> </u>					<u> </u>	
ŀ	(e)						
	<b>*</b>	Transfer of gift	0.1	Alamah!- · f	t	-1	
	Transferee's name, addres	is, and ZIP + 4	Relationship of transferor to transferee			sieree	
					<del></del>		
	<u></u>				· · · · · · · · · · · · · · · · · · ·		

2009	Federal Statements		
Client 06345	The Ina Kay Foundation, Inc.	36-4540423	
5/05/10  Statement 1 Form 990-PF, Part I, Line 11 Other Income		10 30AM	
Tax Refund	Revenue Inv	o) Net (c) restment Adjusted ncome Net Income  0.\$ 0.	
Statement 2 Form 990-PF, Part I, Line 16b Accounting Fees	<b>b</b>		
Accounting Fees		(c) (d) Adjusted Charitable Purposes  2,000. 2,000. \$ 0.	
Statement 3 Form 990-PF, Part VII-A, Line Substantial Contributors Du	ring the Tax Year		
Name of Substantial Co			
Jack Kay Charitable Lea	ad Annuity Tr 8720 Georgia Ave, Su Silver Spring, MD 20		
Statement 4 Form 990-PF, Part VIII, Line 1 List of Officers, Directors, Tr	1 rustees, and Key Employees		
Name and Addre	Title and Average Hours Compen- ess Per Week Devoted sation	Contri- Expense bution to Account/ EBP & DC Other	
Lauren K Pollin P.O. Box 427 Barnesville, MD 20838		0. \$ 0. \$ 0.	
Jack Kay 8720 Georgia Ave., #410 Silver Spring, MD 20910	0 0	0. 0. 0.	
Lauren K Pollin P.O. Box 427 Barnesville, MD 20838	Chairman O	0. 0. 0.	

2009

# **Federal Statements**

Page 2

**Client 06345** 

The Ina Kay Foundation, Inc.

36-4540423

5/05/10

10:30AM

Statement 4 (continued)
Form 990-PF, Part VIII, Line 1
List of Officers, Directors, Trustees, and Key Employees

Name and Address	Title and Average Hours <u>Per Week Devoted</u>	Compen- sation	Contri- bution to EBP & DC	Expense Account/ Other
Lauren K Pollin P.O. Box 427 Barnesville, MD 20838	Treasurer O	\$ 0.	\$ 0.	\$ 0.
Jack Kay 8720 Georgia Ave., #410 Silver Spring, MD 20910	Secretary 0	0.	0.	0.
	Total	\$ 0.	\$ 0.	\$ 0.

### Statement 5 Form 990-PF, Part XV, Line 2a-d **Application Submission Information**

Name of Grant Program:

Name:

Lauren Pollin

Care Of:

8720 Georgia Ave., Suite 410 Silver Spring, MD 20910

Street Address: City, State, Zip Code:

Telephone:

Form and Content:

Letter stating purpose and need of organization

Submission Deadlines: Restrictions on Awards: