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990-PF

Department of the Treasury

Internal Revenue Service

**Return of Private Foundation** 

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

OMB No 1545-0052

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 January 1 . 2009, and ending December 31 . 20 09 Check all that apply: ✓ Initial return Initial return of a former public charity ☐ Final return Amended return ☐ Name change Address change A Employer identification number Use the IRS ワーロフ Medical Associates Clinic Foundation of Dubuque label. Otherwise. Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number (see page 10 of the instructions) print 1605 Associates Drive 101 563-556-8070 or type. See Specific City or town, state, and ZIP code C If exemption application is pending, check here Instructions. Dubuque, IA 52002-2270 D 1. Foreign organizations, check here H Check type of organization. 

Section 501(c)(3) exempt private foundation 2. Foreign organizations meeting the 85% test, check here and attach computation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation E If private foundation status was terminated under Fair market value of all assets at J Accounting method. 

Cash Accrual section 507(b)(1)(A), check here Other (specify) end of year (from Part II, col. (c), F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here line 16) ► \$ 1.383.668 (Part I, column (d) must be on cash basis ) Part I Analysis of Revenue and Expenses (The total of (u) Dispursements for charitable (a) Revenue and (c) Adjusted net (b) Net investment amounts in columns (b), (c), and (d) may not necessarily equal expenses per books purposes (cash basis only) the amounts in column (a) (see page 11 of the instructions).) Contributions, gifts, grants, etc., received (attach schedule) 200,763 2 Check ► ☐ If the foundation is **not** required to attach Sch B 3 36,135 36,135 Interest on savings and temporary cash investments 4 Dividends and interest from securities 5a Gross rents . . . b Net rental income or (loss) (4,554)Net gain or (loss) from sale of assets not on line 10 6a Gross sales price for all assets on line 6a Capital gain net income (from Part IV, line 2) . . 7 8 Net short-term capital gain q Income modifications 10a Gross sales less returns and allowances Less: Cost of goods sold . . . Gross profit or (loss) (attach schedule) . 11 Other income (attach schedule) . . 232,344 36,135 12 Total. Add lines 1 through 11 . 13 Compensation of officers, directors, trustees, etc. 2,800 2,800 and Administrative Expenses 14 Other employee salaries and wages . . . 15 Pension plans, employee benefits 16a Legal fees (attach schedule) 3,500 875 Accounting fees (attach schedule) 2.625 Other professional fees (attach schedula) 17 Interest . . . . . . . 136 136 18 Taxes (attach schedule) (see page 1476) the instructions) Depreciation (attach schedule) and depletion? . ] . 4 19 20 Occupancy . . Travel, conferences, and meetings 21 22 Printing and publications Other expenses (attach schedule) Strat. 2 2,492 23 822 1,670 Operating Total operating and administrative expenses. Add lines 13 through 23 . . . 4.295 8,928 4,633 Contributions, gifts, grants paid Smt 3 95,155 95,155 25 Total expenses and disbursements. Add lines 24 and 25 104,083 99,450 26 4,633 27 Subtract line 26 from line 12: Excess of revenue over expenses and disbursements 128,261 Net investment income (if negative, enter -0-) . 31,502 Adjusted net income (if negative, enter -0-) .

47 2

D	art/II	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	En	q o	f year
		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	0		0	0
	2	Savings and temporary cash investments	1,084,432	1,381,2	52	1,381,252
	3	Accounts receivable ►				
	İ	Less: allowance for doubtful accounts ▶	0		0	0
	4	Pledges receivable ►				
		Less: allowance for doubtful accounts ▶	0		0	0
	5	Grants receivable	. 0		0	0
	6	Receivables due from officers, directors, trustees, and other				
		disqualified persons (attach schedule) (see page 16 of the instructions)				<del> </del>
	7	Other notes and loans receivable (attach schedule) ▶				
S		Less <sup>-</sup> allowance for doubtful accounts ▶			_	
šet	8	Inventories for sale or use				
Assets	9	Prepaid expenses and deferred charges				<u> </u>
•	10a	Investments – U.S. and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)				
	С	Investments—corporate bonds (attach schedule)			l	
	11	Investments—land, buildings, and equipment: basis ▶				
		Less. accumulated depreciation (attach schedule) ▶				
	12	Investments—mortgage loans			Ţ	
	13	Investments—other (attach schedule)				
	14	Land, buildings, and equipment: basis ▶				
		Less accumulated depreciation (attach schedule) ▶				
	15	Other assets (describe ▶)	2,465	2,4	16	2,416
	16	Total assets (to be completed by all filers—see the				
		ınstructions. Also, see page 1, item l)	1,086,897	1,383,66	68	1,383,668
	17	Accounts payable and accrued expenses	31,500	31,00	00	
'n	18	Grants payable				
ije	19	Deferred revenue				, i
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons				! !
iak	21	Mortgages and other notes payable (attach schedule)				
_	22	Other liabilities (describe ▶)	191	6:	50	
	23	Total liabilities (add lines 17 through 22)	31,691	31,6	50	
		Foundations that follow SFAS 117, check here			ᅵ	
S		and complete lines 24 through 26 and lines 30 and 31.				
alances	24	Unrestricted	1,055,206	1,352,0°	18	
a	25	Temporarily restricted				
	26	Permanently restricted				
פ		Foundations that do not follow SFAS 117, check here ▶ □			$\Box$	
اق		and complete lines 27 through 31.			- }	
Net Assets or Fund B	27	Capital stock, trust principal, or current funds				
Š	28	Paid-ın or capıtal surplus, or land, bldg, and equipment fund			_	
se	29	Retained earnings, accumulated income, endowment, or other funds		<u></u>		
As	30	Total net assets or fund balances (see page 17 of the				
et		instructions)	1,055,206	1,352,01	18	
Z	31	Total liabilities and net assets/fund balances (see page 17				
		of the instructions)	1,086,897	1,383,60	68	
_	rt III	Analysis of Changes in Net Assets or Fund Balances	<u> </u>			
1		net assets or fund balances at beginning of year-Part II, colur				
		of-year figure reported on prior year's return)		<del></del>	Ц	1,055,206
2		r amount from Part I, line 27a			_	128,261
3	Othe	r increases not included in line 2 (itemize) ▶			Ц	168,551
4	4 Add lines 1, 2, and 3					1,352,018
5	Decr	eases not included in line 2 (itemize) ▶			$\overline{}$	0
_6	Total	net assets or fund balances at end of year (line 4 minus line 5)-F	Part II, column (b), line	30 6		1,352,018

		e kind(s) of property sold (e g , real estate se, or common stock, 200 shs MLC Co )	,	(b) How acquired P-Purchase D-Donation		e acquired , day, yr )	(d) Date sold (mo , day, yr )
<u>1a</u>	<del>_</del>			<u> </u>			
<u> </u>							
<u>c</u>				<del> </del>			
<u>d</u> e							
	(e) Gross sales price	(f) Depreciation allowed (or allowable)		r other basis ense of sale			n or (loss) f) minus (g)
a							
b							
<u> </u>							
<u>d</u>							
е				10/01/00			
	Complete only for assets show	wing gain in column (h) and owned b			_		(h) gain minus : less than -0-) <b>or</b>
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69		ss of col (i) I (j), if any			rom col (h))
<u>a</u>							
<u>b</u>		<del></del>	<del> </del>				
<u> </u>			· -				
d						<u> </u>	
<u>e</u> 2	Capital gain net income or		also enter in Pa enter -0- in Pa				(4 554)
3		n or (loss) as defined in sections	1222(5) and (6)	):	2		(4,554)
		line 8, column (c) (see pages 13		instructions).			
	If (loss), enter -0- in Part I,			<u> </u>	3 ]		
Part		er Section 4940(e) for Reduvate foundations subject to the s					
Was t		e this part blank. section 4942 tax on the distribut qualify under section 4940(e). Do			oase pe	rıod?	☐ Yes ☐ No
1	Enter the appropriate amo	unt in each column for each yea	r; see page 18	of the instruction	s befor	e making a	iny entries.
Cale	(a) Base period years endar year (or tax year beginning in)	(b) Adjusted qualifying distributions	Net value o	(c) of noncharitable-use as	ssets		(d) ribution ratio divided by col (c))
	2008	248	,397	1,21	6,704	.2	04155653
	2007	199	,907	1,35	6,081		47415236
	2006	250	,517	1,32	7,828	1	88666755
	2005	<del></del>	,765	<del></del>	1,512		69006308
	2004		,616	1,58	2,284	.1	66604731
2	Total of line 1, column (d)				_	2	.875847683
3	<del>-</del>	for the 5-year base period—divid lation has been in existence if le		•		3	.175169537
4	Enter the net value of none	charitable-use assets for 2009 from	om Part X, line	5		4	1,096,763
5 Multiply line 4 by line 3				. ]_	5	192,119	
6	Enter 1% of net investmen	nt income (1% of Part I, line 27b)				6	315
7	Add lines 5 and 6					7	192,434
8	Enter qualifying distribution	ns from Part XII, line 4				8	99,450
	If line 8 is equal to or great Part VI instructions on page	ter than line 7, check the box in je 18.	Part VI, line 1b	o, and complete t	hat par	t using a 1	% tax rate. See the

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P	9	a	۵	ı

Part		e ins	tructi	ons)	
1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ □ and enter "N/A" on line 1.				
	Date of ruling or determination letter (attach copy of letter if necessary – see instructions)			/	
b	) <del>                                     </del>				
	here D and enter 1% of Part I, line 27b				
С	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)				
2	2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)				
3	Add lines 1 and 2	_	630		
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		630	<del></del>	
6	Credits/Payments: 2009 estimated tax payments and 2008 overpayment credited to 2009   6a   386				
a	2009 estimated tax payments and 2008 overpayment credited to 2009 6a 386  Exempt foreign organizations—tax withheld at source 6b				
b 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	-	386		
8	Enter any penalty for underpayment of estimated tax. Check here  uf Form 2220 is attached				
ŷ	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		244		
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid				
11	Enter the amount of line 10 to be: Credited to 2010 estimated tax ▶ Refunded ▶ 11	_	None		
Part '					
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it		Yes	No	
	participate or intervene in any political campaign?	1a		<u> </u>	
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)?	1b		<b>✓</b> _	
	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.			!	
С	Did the foundation file Form 1120-POL for this year?	1c			
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year.				
	(1) On the foundation. ► \$ (2) On foundation managers. ► \$				
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$				
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		<b>✓</b>	
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of			Í	
	incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3_		1	
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		✓	
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b			
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?				
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			į	
	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?	6 7	1		
7					
	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ► lowa				
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 G2 if "No." attach explanation		-,-		
	(or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	✓		
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page				
	27)? If "Yes," complete Part XIV	9		1	
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their				
	names and addresses	10	1		

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Par	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		1
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		1
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	1	
14	Website address ►	3-556	8070	
1		2002-2		
15	0 : 40.5(1/4)	·	270	▶ □
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in fleu of Form 1041—Check here	•	•	
Par	VII-B Statements Regarding Activities for Which Form 4720 May Be Required			
T CIT	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	l —	Yes	No
10			100	110
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?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)			
b	If any answer is "Yes" to 1a(1)–(6), did <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)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here			-
С	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)):			
а	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?			
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.)	2b		
С	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	20		·
2-	Did the foundation hold more than a 204 direct or indirect interest in any husiness enterprise			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	ļ	ļ	
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		1

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Par	VII-B Statements Regarding Activities	s for V	Vhich Form	4720	May Be F	leguire	ed (contin	ued)			ugo (
5a	During the year did the foundation pay or incur a  (1) Carry on propaganda, or otherwise attempt to  (2) Influence the outcome of any specific public  directly or indirectly, any voter registration directly.	any amo to influe c electi	ount to: ence legislati	on (sec	tion 4945(e 55); or to c	))? . arry on	☐ Yes	☑ No ☑ No			
	<ul><li>(3) Provide a grant to an individual for travel, stu</li><li>(4) Provide a grant to an organization other than section 509(a)(1), (2), or (3), or section 4940(c</li><li>(5) Provide for any purpose other than religious</li></ul>	n a cha d)(2)? (s	ritable, etc., ee page 22 o	organiz	ation desc structions)	ribed in	Yes	☑ No ☑ No			
b	purposes, or for the prevention of cruelty to of If any answer is "Yes" to 5a(1)-(5), did any of the	childrer e transa	n or animals? actions fail to	qualify	under the	excepti	Yes				
	Regulations section 53.4945 or in a current notice	_	_						<del> </del>		
С	Organizations relying on a current notice regards if the answer is "Yes" to question 5a(4), does to because it maintained expenditure responsibility	he four	ndation clain	n exem		the tax		► □ □ No			
6a	If "Yes," attach the statement required by Regula Did the foundation, during the year, receive any on a personal benefit contract?	funds,	directly or in	dırectly	, to pay pre			☑ No			
b	Did the foundation, during the year, pay premiur If "Yes" to 6b, file Form 8870.	ns, dıre	ctly or indire	ctly, on	a personal	benefi	_		бb		✓
	At any time during the tax year, was the foundation If yes, did the foundation receive any proceeds of						☐ Yes		7b		
	Information About Officers, Direct and Contractors									ees,	
1	List all officers, directors, trustees, foundation	n mana	gers and th	eir con	npensation	ı (see p	page 22 of	the in	structi	ons).	
	(a) Name and address	hou	e, and average rs per week ed to position	(c) Co (If not	mpensation paid, enter -0-)	emplo	Contributions byee benefit p erred compen	lans	(e) Expe other a	nse acc allowan	
See a	itachment 7										
				!							
									<del>,,</del>		
2	Compensation of five highest-paid employee If none, enter "NONE."	s (oth	er than thos	se inclu	ided on lir	ie 1—s	see page 2	23 of t	he ins	tructi	ons)
	(a) Name and address of each employee paid more than \$50,00	00	(b) Title, and hours per devoted to p	week -	(c) Compe	nsation	(d) Contribut employee b plans and de compensa	enefit eferred	(e) Expe	nse acc allowan	count,
<del>-</del>			]			2,800		0			0
none							<del> </del>				
			1		1		1				

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

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Par	<ul> <li>Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Enand Contractors (continued)</li> </ul>	nployees,
3	Five highest-paid independent contractors for professional services (see page 23 of the instructions). If no	ne, 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	
		<u></u>
Fan	IX-A Summary of Direct Charitable Activities	
	t the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of anizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1		
	Not Applicable	
2		
3		
4 .		
Part	IX-B Summary of Program-Related Investments (see page 24 of the instructions)	<del></del>
Des	scribe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1		
	None	
2		
2 .		
•		
All	other program-related investments. See page 24 of the instructions	
3		
Total	. Add lines 1 through 3	<del></del>

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Part	see page 24 of the instructions.)	gn founda	tions,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes:		
а	Average monthly fair market value of securities	1a	1,111,088
b	Average of monthly cash balances	1b	2,377
С	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	<b>Total</b> (add lines 1a, b, and c)	1d	1,113,465
е	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	none
3	Subtract line 2 from line 1d	3	1,113,465
4	Cash deemed held for charitable activities. Enter 1 ½ % of line 3 (for greater amount, see page 25 of		
	the instructions)	4	16,702
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,096,763
_6	Minimum investment return. Enter 5% of line 5	6	54,838
Part	Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private foundations and certain foreign organizations check here ► □ and do not complete this part.)	operating	
1	Minimum investment return from Part X, line 6	i	54,838
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.) 2b 0		
c	Add lines 2a and 2b	2c	630
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	54,208
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	54,208
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	54,208
Part	Qualifying Distributions (see page 25 of the instructions)		
- are	Au Gualitying Distributions (see page 25 of the instructions)	<del></del>	<del></del>
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	99,450
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:		
а	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	99,450
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	99,450
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating qualifies for the section 4940(e) reduction of tax in those years.	g whether t	he foundation

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Part	XIII ,Undistributed Incon	ne (see page 26 d	of the instructions	)		
1	Distributable amount for 200 line 7	·	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
2	Undistributed income, if any, as o	-				54,208
2 a	Enter amount for 2008 only .				0	
b	Total for prior years. 20,2			0		
3	Excess distributions carryover					
а	From 2004	1				
b	From 2005	179,708				
С	From 2006	185,076				
d	From 2007	132,826				
е	From 2008	188,068				
f	Total of lines 3a through e .		844,007			
4	Qualifying distributions for 200	09 from Part XII,		ł		
	line 4: ▶ \$ 99,450					
a	Applied to 2008, but not more		<del></del>		0	<u> </u>
D	Applied to undistributed incom (Election required—see page 26 c		ł	0		!
С	Treated as distributions out of	·  -			· · · · · · · · · · · · · · · · · · ·	
	required—see page 26 of the ii	' '	0			
d	Applied to 2009 distributable a	ımount				54,208
е	Remaining amount distributed	, –	45,242			
5	Excess distributions carryover	• • • – – – – – – – – – – – – – – – – –	0			0
	(If an amount appears in column			1		
6	amount must be shown in colu					
	indicated below:	_				!
а	Corpus. Add lines 3f, 4c, and 4e		889,249			
b	Prior years' undistributed in- line 4b from line 2b	come. Subtract		اه		
С	Enter the amount of prior year	rs' undistributed				
	income for which a notice of		1			
	been issued, or on which the					ļ
	tax has been previously assess	sed		0		
ď	Subtract line 6c from line					
	amount—see page 27 of the in	F		0		
е	Undistributed income for 200 4a from line 2a. Taxable ame					
	27 of the instructions				0	i
f	Undistributed income for 2009	· · · · ·	-			
•	4d and 5 from line 1. This a			Ì		
	distributed in 2010		]			0
7	Amounts treated as distribution	ns out of corpus				
	to satisfy requirements impo		İ			
	170(b)(1)(F) or 4942(g)(3) (see					
	instructions)	) <del>-</del> -	0			<u> </u>
8	Excess distributions carryover					
	applied on line 5 or line 7 (see instructions)		_			
9	Excess distributions carry	<b>)~</b>	0			
J	Subtract lines 7 and 8 from line		730,920			i
10	Analysis of line 9:		100,020			
a	Excess from 2005	179,708	1			
b	Excess from 2006		j			
С	Excess from 2007		j			
d	Excess from 2008					
е	Excess from 2009	45,242	1			

	XIV Private Operating Founda	tions (see page	27 of the inetri	ictions and Part \	/II-A guestion (1)	Page <b>10</b>
_	If the foundation has received a ruling				VII-A, question 9)	
	foundation, and the ruling is effective for				1	
b	Check box to indicate whether the fou	ndation is a privat	e operating found	ation described in s	ection	(3) or 4942(j)(5)
2a	Enter the lesser of the adjusted net	Tax year		Prior 3 years		(e) Total
	income from Part I or the minimum investment return from Part X for	(a) 2009	<b>(b)</b> 2008	(c) 2007	(d) 2006	(e) Total
	each year listed					
b	85% of line 2a				<u> </u>	
С	Qualifying distributions from Part XII, line 4 for each year listed					
đ	Amounts included in line 2c not used directly for active conduct of exempt activities					
е	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:		}			
а	"Assets" alternative test - enter:					
	(1) Value of all assets	ļ		<u> </u>		
	(2) Value of assets qualifying under					
	section 4942(j)(3)(B)(i)			<del></del>		
b	"Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
С	"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	on (Complete t	his part only if	the foundation I	nad \$5,000 or me	ore in assets at
	any time during the year-	-see page 28 c	of the instruction	ns.)		
1	Information Regarding Foundation	Managers:				
а	List any managers of the foundation					by the foundation
	before the close of any tax year (but o	only if they have o	contributed more t	:nan \$5,000). (See s	section 507(d)(2).)	
N/A		<del> </del>				
b	List any managers of the foundation					rge portion of the
	ownership of a partnership or other e	nuty) of which the	iounuation has a	1 10% or greater in	ieresi.	
N/A		0: 0:4 1 -	O-b-l	-4		
2	Information Regarding Contribution Check here ▶ ☐ If the foundation				organizations and	door not accont
	unsolicited requests for funds. If the	•	•		_	•
	organizations under other conditions,			oto: (000 pago 20		, to marriadalo of
a				cations should be a	addressed:	<del></del>
N/A	The hame, address, and telephone he	imbor of the pero	on to whom app		200,0000	
b	The form in which applications should	d be submitted an	nd information and	materials they sho	ould include:	
N/A	,,					
C N/A	Any submission deadlines:					
d	Any restrictions or limitations on av factors:	vards, such as t	geographical a	areas, charitable fi	elds, kinds of inst	titutions, or other

N/A

a as

3 Grants and Contributions Paid During	the Year or Approv	ed for Fu	ture Payment	
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of		Amount
Name and address (home or business)	or substantial contributor	recipient	Contribution	
a Paid during the year				
See attachment 8				
		ļ		
b Approved for future payment	<u> </u>	<del></del>	<u> ▶ 3a</u>	<del> </del>
United Way Dubuque, IA 52001	None	None	United Way Support	31,000
Total	<u> </u>	<del></del>	<b>▶</b> _3b	31,000

Fα	AVAV	Analysis of Income-Producing Ad					
∃nt∈	r gros	s amounts unless otherwise indicated.	Unrelated bu	siness income	Excluded by section	on 512, 513, or 514	ιο,
			(a) Business code	<b>(b)</b> Amount	(c) Exclusion code	<b>(d)</b> Amount	Related or exempt function income (See page 28 of
1	Prog	ram service revenue:					the instructions.)
	a _						
	ь _						
	c _				ļ. <u> </u>		
	d _						
	е_						
	f _						
	_	ees and contracts from government agencies		·			
2	Mem	bership dues and assessments			ļ		
3		est on savings and temporary cash investments			136	36,135	<u> </u>
4		ends and interest from securities			<u> </u>	<del></del>	
5	Net r	ental income or (loss) from real estate:			<u> </u>		
		ebt-financed property					
		ot debt-financed property	ļ	- <del></del>	<del>                                     </del>		
		ental income or (loss) from personal property	L	······································	<del> </del> i		
7	Othe	r investment income			<u> </u>		
8		or (loss) from sales of assets other than inventory		<del></del>	<del> </del> -	<u>–</u>	
9		ncome or (loss) from special events			<del> </del>		
		s profit or (loss) from sales of inventory					
11	Othe	r revenue: a			<del>                                     </del>		
	b _						
	c _				<del> </del>		
			I I		1		
	d _				+		
	e _						
	e _ Subte	otal. Add columns (b), (d), and (e)				36,135	
13	e Subto	otal. Add columns (b), (d), and (e)  I. Add line 12, columns (b), (d), and (e)				36,135 13	36,135
1 <b>3</b> See	e _ Subto Total works	otal. Add columns (b), (d), and (e)  1. Add line 12, columns (b), (d), and (e)	calculations.)	· · · ·			36,135
13 See Pa	e Subto Total works	otal. Add columns (b), (d), and (e)  I. Add line 12, columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e _ Subto Total works	otal. Add columns (b), (d), and (e)  1. Add line 12, columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)  I. Add line 12, columns (b), (d), and (e)  sheet in line 13 instructions on page 28 to verify  Relationship of Activities to the A  Explain below how each activity for which accomplishment of the foundation's exempt	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	
13 See Pa	e Subto Total works t XV e No.	otal. Add columns (b), (d), and (e)	calculations.)	ent of Exemp	t Purposes	13	

e e e

Par	t XVII		n Regarding Tra	nsfers To and Trar	nsaction	s and	Relationships W	th Noncha	ritabl		ge 10
1	ın se			engage in any of the section 501(c)(3) orga						Yes	No
а	Tran	sfers from the rep	porting foundation t	o a noncharitable exe	empt orga	nızatıor	n of.				
	(1) C	Cash							1a(1)		1
		Other assets .							1a(2)		_ ✓
þ		r transactions:									لــــ ـــ
			a noncharitable exc						1b(1)		
				able exempt organiza er assets					1b(2)		<b>√</b>
			• •	erassets					1b(3) 1b(4)		<del></del>
									1b(5)		7
				hip or fundraising soli					1b(6)		1
С				sts, other assets, or p					1c		1
d	value	of the goods, o	ther assets, or serv	es," complete the follouces given by the repo gement, snow in colur	orting fou	ındatıor	n. If the foundation r	eceived less	than '	faır m	arket
(a) Li	ne no	(b) Amount involved	(c) Name of nonc	haritable exempt organizati	on	(d) Desc	inption of transfers, transf	actions, and sha	ring arra	angeme	ents
							<del></del>				
		<del></del>							<u>.</u> .		
							·				
								<del></del> -			
			·								
							<u> </u>				
							<del></del>				
				· <del></del>				<del></del>			
							<del></del>				
	desc	ribed in section 5		filiated with, or relate other than section 50 s.					] Yes		No
		(a) Name of organ	ızatıon	(b) Type of org	janization		(c) Desc	nption of relation	ship		
	_										
				<del> </del>							
								·			
				mined this return, including preparer (other than taxpay			ed on all information of w	hich preparer has	s any kr	nowled	
ø	Sign	nature of officer of trus	stee		Date	1//3	Title	U +V/2 1)	(4)	<u> </u>	
<del>f</del> er	, 5igi	or this or thus			Date		,	Preparer's id	entifier		
Sign Here	Paid Preparer's Use Only	Preparer's					Check if self-employed ▶ □	number (see page 30 of th	Signat	ture o	
	- argu	Firm's name (or you	ırs ıf		<del></del>		I EIN ►				
		self-employed), add	lress,		<del></del>		Phone no				

#### 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 Associates Clinic Foundation of Dubuque 11721040 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 501(c)(3) exempt private foundation Form 990-PF 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 331/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and 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).

0 1 ad 1a B			
	(Form 990, 990-EZ, or 990-PF) (2009)  Organization  Lical Associates Clinic Foundation	on of Dubyque 42	Page of of Part ployer identification number 2
Part I	Contributors (see instructions)	2	
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
.)	Modical Associates Clinic, P.C. 1500 Associates Drive Dubuque, IA 52002-2201	\$ 200,000	Person Payroll Noncash  (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash  (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash  (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
			Person

Payroll Noncash

(Complete Part II if there is a noncash contribution)

# MÉDICAL ASSOCIATES CLINIC FOUNDATION OF DUBUQUE FORM 990PF, PART I - TAXES REVENUE AND NET

DESCRIPTIONEXPENSES PER BOOKSINVESTMENT INCOMEEXCISE TAXES136136

TOTALS 136 136

MEDICAL ASSOCIATES CLINIC FOUNDATION OF DUBUQUE	ES CLINIC FOUNDATION OF D	VUBUQUE		42-1172640
11		REVENUE AND	NET	
		EXPENSES PER BOOKS	INVESTMENT	CHARITABLE PURPOSES
DESCRIPTION				
INSURANCE		•	ı	•
ADVERTISING		•	ı	ı
MISCELLANEOUS		ω	ဧ	S
BANK FEES		2,484	820	1,664
	TOTALS	2,492	822	1,670

STATEMENT 2

FORM 990PF, PART I - CONTRIBUTIONS, GIFTS, GRANTS PAID	S, GIFTS, GRANTS PAID	Sheet3	
RECIPIENT 3/2.1°	RELATIONSHIP TO SUBSTANTIAL CONTPIPUTOR AND FOUNDATION OF BECIPIENT	PURPOSE OF GRANT	AMOUNT
GRANTS PAID			
UNITED WAY DUBUQUE, IA 52001	NONE	ANNUAL UNITED WAY SUPPORT	31,000
UNIVERSITY OF DUBUQUE DUBUQUE, IA 52001	NONE	NURSING PROGRAM SCHOLARSHIP	200
HILLS & DALES DUBUQUE, IA 52001	NONE	FACILITY RENNOVATION	20,000
MERCY MEDICAL CENTER DUBUQUE, IA 52001	NONE	ELECTROPHYSIOLOGY PROGRAM	10,000
ST JUDES HOSPITAL ST LUCIA	NONE	ST JUDES HOSPITAL SUPPORT	200
LORAS COLLEGE DUBUQUE, IA 52001	NONE	ESTABLISHMENT OF DNA LAB	33,155
		TOTAL CONTRIBUTIONS PAID	95,155
GRANTS ACCRUED			
UNITED WAY DUBUQUE, IA 52001	NONE	ANNUAL UNITED WAY SUPPORT	31,000
		TOTAL CONTRIBUTIONS ACCRUED	31,000
		TOTAL CONTRIBUTIONS PAID AND ACCRUED	ED 126,155

## MEDICAL ASSOCIATES CLINIC FOUNDATION OF DUBUQUE

42-1172640

## FORM 990PF, PART II - OTHER ASSETS

<u>DESCRIPTION</u>		ENDING BOOK VALUE	ENDING FMV
MISCFLLANEOUS RECEIVABLE ACCRUED INTEREST RECEIVABLE		- 2,416	- 2,416
	TOTALS	2,416	2,416

MEDICAL ASSOCIATES CLINIC FOUNDA	TION OF DUBUQUE	42-1172640
FORM 990PF, PART II - OTHER LIABILITIE	≣S ■	
		ENDING BOOK VALUE
DESCRIPTION		
EXCISE TAX PAYABLE		50
	TOTALS	50

STATEMENT 5

4 40 6

MEDICAL ASSOCIATES CLINIC FOUNDATION OF DUBUQUE

42-1172640

## FORM 990PF, PART III - OTHER INCREASES (DECREASES) IN NET WORTH OR FUND BALANCES

		AMOUNT
DESCRIPTION		
CHANGE IN UNREALIZED GAINS (LOSS	SES)	168,551
(,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	,	·
	TOTALS	168,551

## MEDICAL ASSOCIATES CLINIC FOUNDATION OF DUBUQUE

42-1172640

### FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS AND TRUSTEES

NAME AND ADDRESS	TITLE AND TIME DEVOTED TO POSITION	COMPENSATION
MR. JOHN TALLENT DUBUQUE, IA 52001	EX DIRECTOR 1.0	-
MR. RONALD FAHEY, CPA DUBUQUE, IA 52001	TREASURER 1.0	-
DR ED O'NEILL DUBUQUE, IA 52001	DIRECTOR 1 0	700
DR MARK MOORE DUBUQUE, IA 52001	CHAIRMAN 1 0	400
DR MARSHA HORWITZ DUBUQUE, IA 52001	DIRECTOR 1 0	700
DR LAURA NEAL DUBUQUE, IA 52001	DIRECTOR 1 0	400
DR. LAWRENCE KUKLA DUBUQUE, IA 52001	DIRECTOR 1 0	600
		2,800

Sheet8

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR OR APPROVED FOR PAYMENT

AMOUNT		31,000	200	20.000	10,000	200	33,155	95,155
PURPOSE OF GRANT OR CONTRIBUTION		ANNUAL UNITED WAY SUPPORT	NURSING PROGRAM SCHOLARSHIP	FACILITY RENNOVATION	ELECTROPHYSIOLOGY PROGRAM	ST JUDES HOSPITAL SUPPORT	ESTABLISHMENT OF DNA LAB	TOTAL CONTRIBUTIONS PAID DURING THE YEAR
RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT		NONE	NONE	NONE	NONE	NONE	NONE	01
RECIPIENT NAME AND ADDRESS	GRANTS PAID	UNITED WAY DUBUQUE, IA 52001	UNIVERSITY OF DUBUQUE DUBUQUE, IA 52001	HILLS & DALES DUBUQUE, IA 52001	MERCY MEDICAL CENTER DUBUQUE, IA 52001	ST JUDES HOSPITAL ST LUCIA	LORAS COLLEGE DUBUQUE, IA 52001	

#### Part VII-A

# MEDICAL ASSOCIATES CLINIC FOUNDATION OF DUBUQUE

42-1172640

# FORM 990PF, PART VII-A - SUBSTANTIAL CONTRIBUTORS

Medical Associates Clinic, P C

1500 Associates Drive Dubuque, IA 52001