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EXTENDED THROUGH AUGUST 15, 2010

Form **990-PF**

# 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 calendar year 2009, or tax year beginning , and ending

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation <b>THE IOWA FOUNDATION FOR EDUCATION, ENVIRONMENT AND THE ARTS</b>		A Employer identification number <b>42-1333063</b>
	Number and street (or P.O. box number if mail is not delivered to street address)	Room/suite	B Telephone number <b>(515)981-6780</b>
	City or town, state, and ZIP code <b>INDIANOLA, IA 50125</b>		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ <b>5,727,818.</b>		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		4,118.	4,118.		STATEMENT 1
4 Dividends and interest from securities		18,320.	18,320.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		119,100.			
b Gross sales price for all assets on line 6a		437,813.			
7 Capital gain net income (from Part IV, line 2)			119,100.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less: Cost of goods sold					
c Gross profit or (loss)		131.	131.		STATEMENT 3
11 Other income		141,669.	141,669.		
12 Total. Add lines 1 through 11		79,881.	74,381.		5,500.
13 Compensation of officers, directors, trustees, etc.					
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees		10,979.	8,939.		2,040.
c Other professional fees					
17 Interest		1,871.	1,871.		0.
18 Taxes		1,103.	682.		421.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses		6,949.	6,916.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		100,783.	92,789.		7,961.
25 Contributions, gifts, grants paid		261,825.			261,825.
26 Total expenses and disbursements. Add lines 24 and 25		362,608.	92,789.		269,786.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-220,939.			
b Net investment income (if negative, enter -0-)			48,880.		
c Adjusted net income (if negative, enter -0-)				N/A	

**THE IOWA FOUNDATION FOR EDUCATION,  
ENVIRONMENT AND THE ARTS**

42-1333063

Page 2

<b>Part II Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1	Cash - non-interest-bearing		2,880.	2,795.	2,795.
	2	Savings and temporary cash investments		723,894.	926,539.	926,539.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations <b>STMT 9</b>		3,246,805.	2,857,432.	2,857,432.
	b	Investments - corporate stock <b>STMT 10</b>		671,963.	1,025,934.	1,025,934.
	c	Investments - corporate bonds				
<b>Liabilities</b>	11	Investments - land, buildings, and equipment basis ▶				
		Less: accumulated depreciation ▶				
	12	Investments - mortgage loans				
	13	Investments - other <b>STMT 11</b>		682,576.	915,118.	915,118.
	14	Land, buildings, and equipment: basis ▶				
		Less: accumulated depreciation ▶				
	15	Other assets (describe ▶)				
	16	<b>Total assets (to be completed by all filers)</b>		5,328,118.	5,727,818.	5,727,818.
	17	Accounts payable and accrued expenses		2,198.	246.	
	18	Grants payable				
<b>Net Assets or Fund Balances</b>	19	Deferred revenue				
	20	Loans from officers, directors, trustees and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
	23	<b>Total liabilities (add lines 17 through 22)</b>		2,198.	246.	
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31					
	27	Capital stock, trust principal, or current funds		0.	0.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
	29	Retained earnings, accumulated income, endowment, or other funds		5,325,920.	5,727,572.	
30	<b>Total net assets or fund balances</b>		5,325,920.	5,727,572.		
31	<b>Total liabilities and net assets/fund balances</b>		5,328,118.	5,727,818.		

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

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	5,325,920.
2	Enter amount from Part I, line 27a	2	-220,939.
3	Other increases not included in line 2 (itemize) ▶ <b>SEE STATEMENT 8</b>	3	622,591.
4	Add lines 1, 2, and 3	4	5,727,572.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	<b>Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30</b>	6	5,727,572.

**THE IOWA FOUNDATION FOR EDUCATION,  
ENVIRONMENT AND THE ARTS**

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b SEE ATTACHED STATEMENTS			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 437,813.		318,713.	119,100.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			119,100.

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	119,100.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):	<div> <div>If gain, also enter in Part I, line 8, column (c).</div> <div>If (loss), enter -0- in Part I, line 8</div> </div>	3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	233,909.	5,582,307.	.041902
2007	266,381.	5,874,749.	.045343
2006	267,711.	5,751,411.	.046547
2005	258,335.	5,711,336.	.045232
2004	407,916.	5,507,920.	.074060

2 Total of line 1, column (d)	2	.253084
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.050617
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	5,445,052.
5 Multiply line 4 by line 3	5	275,612.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	489.
7 Add lines 5 and 6	7	276,101.
8 Enter qualifying distributions from Part XII, line 4	8	269,786.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.  
See the Part VI instructions.

**THE IOWA FOUNDATION FOR EDUCATION,  
ENVIRONMENT AND THE ARTS**

42-1333063

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	978.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		3	978.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	978.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a 2,920.	7	2,920.
b Exempt foreign organizations - tax withheld at source	6b	8	
c Tax paid with application for extension of time to file (Form 8868)	6c	9	
d Backup withholding erroneously withheld	6d	10	1,942.
7 Total credits and payments. Add lines 6a through 6d		11	942.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
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 <input type="checkbox"/> 1,000. Refunded <input type="checkbox"/>			

**Part VII-A Statements Regarding Activities**

	Yes	No
1a 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?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 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		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
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.		X
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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> IA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
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)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Form 990-PF (2009)

**THE IOWA FOUNDATION FOR EDUCATION,  
ENVIRONMENT AND THE ARTS**

42-1333063

Page 5

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see 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 application? Website address ► N/A	13	X	
14	The books are in care of ► <b>TINA M. PATTEN</b> Telephone no. ► <b>515-961-6780</b> Located at ► <b>13607 - 169TH LANE, INDIANOLA, IA</b> ZIP+4 ► <b>50125</b>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15   N/A			

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	X
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

Form 990-PF (2009)

**Part VII-B** Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

6b

X

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

7b

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
LAURIE BELIN 1705 PLAZA CIRCLE DES MOINES, IA 50322	PRESIDENT 5.00	11,000.	0.	0.
DR. THOMAS RICHARD BELIN 901 GEORGINA AVENUE SANTA MONICA, CA 90402	VICE-PRESIDENT 1.00	0.	0.	0.
JOY ELIZABETH BELIN 4615 N. PARK AVENUE, NO. 1604 CHEVY CHASE, MD 20815	DIRECTOR 1.00	0.	0.	0.
JAMES M. BELIN 202 EAST MCDOWELL ROAD, SUITE 135 PHOENIX, AZ 85004	SECRETARY/TREASURE 1.00	68,881.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

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

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

0

Form 990-PF (2009)

## Part VIII

**Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)

**3 Five highest-paid independent contractors for professional services. If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
JAMES M BELIN - 202 EAST MCDOWELL RD STE 135, PHOENIX, AZ 85004	INVESTMENT ADVISORY FEES	68,881.
Total number of others receiving over \$50,000 for professional services		0

<b>Part IX-A</b>	<b>Summary of Direct Charitable Activities</b>
------------------	--

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

1	N/A	
2		0.
3		
4		

<b>Part IX-B</b>	<b>Summary of Program-Related Investments</b>
------------------	---

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

1	N/A	
2		
3		
Total. Add lines 1 through 3		0



**THE IOWA FOUNDATION FOR EDUCATION,  
ENVIRONMENT AND THE ARTS**

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	4,699,915.
b	Average of monthly cash balances	1b	828,057.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	5,527,972.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	5,527,972.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	82,920.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,445,052.
6	Minimum investment return. Enter 5% of line 5	6	272,253.

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

1	Minimum investment return from Part X, line 6	1	272,253.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	978.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	978.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	271,275.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	271,275.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	271,275.

**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	1a	269,786.
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	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
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	269,786.
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	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	269,786.

**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.

**THE IOWA FOUNDATION FOR EDUCATION,  
ENVIRONMENT AND THE ARTS**

42-1333063

Page 9

**Part XIII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				271,275.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	14,683.			
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	14,683.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$	269,786.			
a Applied to 2008, but not more than line 2a			0.	
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				269,786.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	1,489.			1,489.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	13,194.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	13,194.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

N/A

- 4942(j)(3) or ☐ 4942(j)(5)

- (4) Gross investment income**

[illegible]

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







**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	ACERGY	P	11/21/08	04/30/09
b	AKITA DRILLING	P	12/15/08	10/14/09
c	BPZ RESOURCES	P	02/05/09	05/04/09
d	ENERFLEX SERVICES INCOME FUND	P	12/15/08	10/19/09
e	ISHARES IBOXX INVESTMENT GRADE CORP BOND FUND	P	12/15/08	10/13/09
f	PRINCIPAL FINANCIAL GROUP PREFERRED B	P	03/11/09	04/14/09
g	ROYCE VALUE TRUST 5.9% PREFERRED	P	12/21/05	11/06/09
h	WESTERN GOLDFIELDS	P	04/17/09	06/11/09
i	K-1 MARATHON PARTNERS L.P.	P	VARIOUS	VARIOUS
j	K-1 MARATHON PARTNERS L.P.	P	VARIOUS	VARIOUS
k	UNITED STATES NATURAL GAS FUND	P	07/15/09	08/03/09
l	ABERDEEN ASIA PACIFIC INCOME FUND	P	12/07/05	10/14/09
m	GENERAL ELECTRIC	P	06/24/08	10/22/09
n	PIMCO ALL ASSET FUND	P	09/28/05	10/22/09
o	REINVESTMENTS	P	VARIOUS	10/22/09

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 15,294.		7,791.	7,503.
b 113,969.		50,792.	63,177.
c 17,676.		12,683.	4,993.
d 53,082.		30,119.	22,963.
e 10,253.		9,617.	636.
f 38,446.		20,913.	17,533.
g 23,789.		23,120.	669.
h 91,803.		45,996.	45,807.
i 729.			729.
j		28,928.	-28,928.
k 13,511.		12,606.	905.
l 10,763.		9,420.	1,343.
m 15,169.		27,420.	-12,251.
n 13,526.		15,000.	-1,474.
o 2,831.		3,001.	-170.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			7,503.
b			63,177.
c			4,993.
d			22,963.
e			636.
f			17,533.
g			669.
h			45,807.
i			729.
j			-28,928.
k			905.
l			1,343.
m			-12,251.
n			-1,474.
o			-170.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }	3	

**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	REINVESTMENTS	P	VARIOUS	10/22/09
b	TESORO CORPORATION	P	06/20/08	10/22/09
c				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 947.		827.	120.
b 16,025.		20,480.	-4,455.
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			120.
b			-4,455.
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	119,100.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }	3	N/A



## FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
INTEREST INCOME FROM INVESTMENTS	1,774.
INTEREST INCOME FROM K-1S	2,344.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	4,118.

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDEND INCOME FROM INVESTMENTS	14,683.	0.	14,683.
DIVIDEND INCOME FROM K-1	3,637.	0.	3,637.
TOTAL TO FM 990-PF, PART I, LN 4	18,320.	0.	18,320.

## FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
MISCELLANEOUS INCOME FROM K-1	131.	131.	
TOTAL TO FORM 990-PF, PART I, LINE 11	131.	131.	

## FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	6,899.	6,899.		0.
ANNUAL TAX PREPARATION	4,080.	2,040.		2,040.
TO FORM 990-PF, PG 1, LN 16B	10,979.	8,939.		2,040.

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FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	261.	261.		0.
PAYROLL TAXES	842.	421.		421.
TO FORM 990-PF, PG 1, LN 18	1,103.	682.		421.

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FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT EXPENSES	457.	457.		0.
PORTFOLIO DEDUCTIONS FROM K-1	6,365.	6,365.		0.
PENALTY	33.	0.		0.
SERVICE FEES	94.	94.		0.
TO FORM 990-PF, PG 1, LN 23	6,949.	6,916.		0.

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FOOTNOTES	STATEMENT	7
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FORM 990, PAGE 1, LINE 13 AND PAGE 6, PART VIII

THESE LINES INCLUDE \$68,881 PAID TO JAMES M BELIN FOR INVESTMENT ADVISORY FEES.

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FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
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DESCRIPTION	AMOUNT
UNREALIZED GAIN/LOSS ON INVESTMENTS	622,591.
TOTAL TO FORM 990-PF, PART III, LINE 3	622,591.

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FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	9
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
US TREASURY BILLS	X		2,857,432.	2,857,432.
TOTAL U.S. GOVERNMENT OBLIGATIONS			2,857,432.	2,857,432.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			2,857,432.	2,857,432.

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FORM 990-PF	CORPORATE STOCK	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK	1,025,934.	1,025,934.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,025,934.	1,025,934.

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FORM 990-PF	OTHER INVESTMENTS	STATEMENT	11
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS	COST	10,402.	10,402.
PARTNERSHIP INVESTMENT	COST	617,265.	617,265.
CLOSE END INVESTMENTS	COST	221,950.	221,950.
OTHER INVESTMETNS	COST	65,501.	65,501.
TOTAL TO FORM 990-PF, PART II, LINE 13		915,118.	915,118.

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FORM 990-PF

GRANTS AND CONTRIBUTIONS  
PAID DURING THE YEAR

STATEMENT 12

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
1000 FRIENDS OF IOWA HAY ROAD, #605 DES MOINES, IA 50310-1300	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	20,000.
ANIMAL RESCUE LEAGUE OF IOWA, INC 5452 NE 22ND STREET DES MOINES, IA 50313	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	2,500.
ARIZONA CENTER FOR LAW IN THE PUBLIC INTEREST MCDOWELL RD, STE 153 PHOENIX, AZ 85004	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	5,000.
AMERICAN SOCIETY FOR PREVENTION OF CRUELTY TO ANIMALS 110 FIFTH AVENUE, 2ND FLOOR NEW YORK, NY 10011	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	6,000.
ATTACHMENT PARENTING INT'L (API) 325 18TH STREET WEST DES MOINES, IA 50265	NONE NEWS MEMBERSHIP COST	PUBLIC CHARITY	1,750.
BLANK PARK ZOO 7401 SW 9TH STREET DES MOINES, IA 50315	NONE CAPITAL SUPPORT FOR EXPANSION	PUBLIC CHARITY	5,000.
B'NAI HORIN/CHILDREN OF FREEDOM 10810 AYRES AVE LOS ANGELES, CA 90064	NONE TORAH FUND	PUBLIC CHARITY	1,800.
CIVIC MUSIC ASSOCIATION 400 LOCUST ST, SUITE 220 DES MOINES, IA 50309	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	56,600.

COMMUNITY FOOD SECURITY COALITION 3830 SE DIVISION PORTLAND, OR 97202	NONE SUPPORT ANNUAL CONFERENCE	PUBLIC CHARITY	2,500.
CREATING GREAT PLACES 401 5TH AVE S. COON RAPIDS, IA 50058	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	5,000.
DES MOINES ART CENTER 4700 GRAND AVE DES MOINES, IA 50312-2099	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	5,000.
DES MOINES PASTORAL COUNSELING CTR. 2929 WESTOWN PARKWAY, SUITE 110 WEST DES MOINES, IA 50266	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	2,500.
FACING HISTORY AND OURSELVES 16 HURD ROAD BROOKLINE, MA 02445	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	1,000.
ICAN OF CENTRAL IOWA 2833 50TH STREET DES MOINES, IA 50310	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	3,750.
HELEN KELLER INT'L 352 PARK AVE SOUTH, STE 1200 NEW YORK, NY 10010	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	10,000.
IOWA ENVIRONMENTAL COUNCIL 521 EAST LOCUST ST, SUITE 220 DES MOINES, IA 50309-1939	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	3,000.
IOWA INTERFAITH POWER & LIGHT 4625 BEAVER AVE DES MOINES, IA 50310	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	3,600.
JEWISH FOUNDATION OF GREATER DES MOINES 910 POLK BLVD DES MOINES, IA 50312	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	3,600.

THE IOWA FOUNDATION FOR EDUCATION, ENVIRO

42-1333063

IOWA JEWISH SENIOR LIFE CENTER 900 POLK BLVD DES MOINES, IA 50312	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	2,000.
IOWA LEGAL AID SOCIETY 1111 9TH AVE, SUITE 230 DES MOINES, IA 50314	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	2,500.
IOWA NATURAL HERITAGE FOUNDATION 505 FIFTH AVE, SUITE 444 DES MOINES, IA 50309	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	1,000.
IOWA NETWORK FOR COMMUNITY AGRICULTURE 700 LOCUST ST. STE 100 DES MOINES, IA 50309	NONE SUPPORT ANNUAL CONFERENCE	PUBLIC CHARITY	2,000.
IOWA RENEWABLE ENGERY ASSOCIATION PO BOX 3405 IOWA CITY, IA 52244	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	15,000.
IOWA RIVERS REVIVAL P.O. BOX 72 DES MOINES, IA 50301	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	2,500.
IRONDALE CENTER - ENSEMBLE PROJECT PO BOX 150604 BROOKLYN, NY 11215	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	8,500.
JEWISH FOUNDATION FOR THE RIGHTEOUS 909 THIRD AVE, SUITE 1201 NEW YORK, NY 10022	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	3,000.
JEWISH OUTREACH INSTITUTE 1270 BROADWAY, SUITE 609 NEW YORK, NY 10001	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	15,000.
LOCAL FOODS CONNECTION PO BOX 2821 IOWA CITY, IA 52244	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	9,525.

MONTGOMERY COUNTY HUMANE SOCIETY 14645 ROTHGEB DRIVE ROCKVILLE, MD 20850	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	4,000.
NATURE CONSERVANCY IN IOWA 303 LOCUST ST, SUITE 402 DES MOINES, IA 50309	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	2,500.
NEW JERSEY SCHOLARS PROGRAM PO BOX 6008 LAWRENCEVILLE, NJ 08648	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	5,000.
PANIM: THE INSTITUTE FOR JEWISH LEADERSHIP AND VALUES 6163 EXECUTIVE BLVD ROCKVILLE, MD 20852	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	500.
PHOENIX HOUSE 11600 ELDRIDGE AVENUE LAKE VIEW TERRACE, CA 91342	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	1,000.
PLANNED PARENTHOOD OF THE HEARTLAND 1171 7TH STREET DES MOINES, IA 50314	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	1,500.
REPERTORY THEATER OF IOWA 1201 N. B STREET INDIANOLA, IA 50125	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	1,000.
ROSIE'S HOUSE P.O. BOX 13446 PHOENIX, AZ 85002	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	1,000.
SALISBURY HOUSE FOUNDATION 4025 TONAWANDA DRIVE DES MOINES, IA 50312	NONE SUPPORT CHAMBER MUSIC SERIES	PUBLIC CHARITY	2,000.
TEMPLE B'NAI JESHURUN 5101 GRAND AVE DES MOINES, IA 50312	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	20,500.

THE IOWA FOUNDATION FOR EDUCATION, ENVIRO

42-1333063

TREES FOREVER 770 7TH AVE MARION, IA 52302	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	3,500.
UCLA SCHOOL OF PUBLIC HEALTH 10920 WILSHIRE BOULEVARD STE 1400 LOS ANGELES, CA 90024	NONE BRESLOW STUDENT FELLOWSHIP	PUBLIC CHARITY	1,000.
UNVIERSITY OF IOWA FOUNDATION PO BOX 4550 IOWA CITY, IA 52244	NONE SUPPORT BELIN - BLANK CENTER	PUBLIC CHARITY	2,000.
WHITEROCK CONSERVANCY 1390 HWY 141 COON RAPIDS, IA 50058	NONE GENERAL OPERATING BUDGET	PUBLIC CHARITY	5,000.
WINDSOR HEIGHTS FOUNDATION 1133 66TH STREET WINDSOR HEIGHTS, IA 50311	NONE ENDOWMENT FUND	PUBLIC CHARITY	2,000.
YOUNG WOMEN'S RESOURCE CENTER 705 E 2ND STREET DES MOINES, IA 50309	NONE DOULA PROGRAM	PUBLIC CHARITY	8,200.
PHOENIX ART MUSEUM 1625 NORTH CENTRAL AVENUE PHOENIX, AZ 85004	NONE SUPPORT CHILDREN FAMILY PROGRAMS	PUBLIC CHARITY	1,500.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

261,825.



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

▶ File a separate application for each return.

OMB No. 1545-1709

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

**Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.****Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ☐*All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns***Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*.

Type or print  File by the due date for filing your return. See instructions.	Name of Exempt Organization <b>THE IOWA FOUNDATION FOR EDUCATION, ENVIRONMENT AND THE ARTS</b>	Employer identification number <b>42-1333063</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>13607 - 169TH LANE</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>INDIANOLA, IA 50125</b>	

**Check type of return to be filed** (file a separate application for each return)

- |   |   |                                    |
|---|---|------------------------------------|
| <input type="checkbox"/> Form 990               | <input type="checkbox"/> Form 990-T (corporation)                 | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL            | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ            | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A                              | <input type="checkbox"/> Form 8870 |

**TINA M. PATTEN**

- The books are in the care of ▶
- 13607 - 169TH LANE - INDIANOLA, IA 50125**

Telephone No. ▶ **515-961-6780**

FAX No. ▶

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover.

- 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2010**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ▶ ☒ calendar year **2009** or
- ▶ ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

- 2 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

<b>3a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$	<b>0.</b>
<b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$	<b>0.</b>
<b>c</b> <b>Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$	<b>0.</b>

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. 4-2009)