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

OMB No 1545-0052 200a

nternal R	tevenue Se	Mote: The foundation	tion may	be able to use a copy of	this return to s	satisfy state r	eporting requirements	
		year 2009, or tax year beg				, and endir		, 20
		hat apply Initial retu		Initial return	of a former p	ublic chari	tv	Final return
		Amended			ss change		Name change	<u>-</u>
	•	Name of foundation	·otain		oo onango		A Employer identifi	cation number
		Name of roundation					A Employer lacinali	
Use the IRS   AVIVA CHARITABLE FOUND			FOUND	A TO LON		12-	1431745	
	rwise.					D		
	int	Number and street (or P O box	k number i	mail is not delivered to stree	t address)	Room/suit	B Telephone number (see	page 10 of the instructions)
•	ype.	699 WALNUT STREET						
	pecific	20TH FLOOR					(51	5) 557-3910
	ctions.	City or town, state, and ZIP co	de				<ul> <li>If exemption application pending, check here</li> </ul>	
							D 1 Foreign organizat	<b>▶</b>
		DES MOINES, IA 50	309				2 Foreign organiza	tions meeting the
I Che	ck type	of organization X Sect	ion 501	(c)(3) exempt private	foundation		85% test, check to computation .	
_	• •	1947(a)(1) nonexempt charitab		Other taxable pr		tion		
		t value of all assets at end		ounting method X C		rual	E If private foundation	
		m Part II, col. (c), line		ther (specify)	2311	, uu		)(1)(A), check here . P
	<b>►</b> \$	1,705,273.		column (d) must be or	cash hasis			in a 60-month termination (1)(B), check here
		<del></del>		Columni (a) mast be or	l cash basis j	<del></del>	under section 507(b	1
Part		rsis of Revenue and Expen f amounts in columns (b), (c), ar		(a) Revenue and	(b) Net inve	estment	(c) Adjusted net	(d) Disbursements for charitable
	may n	ot necessarily equal the amount	ts in	expenses per books	incon		income	purposes
	colum	n (a) (see page 11 of the instruc	tions))	<u></u>				(cash basis only)
1	Contribut	ions, gifts, grants, etc., received (attach so	hedule)	250,000	<u> </u>			
2	Check	if the foundation is <b>not</b> red attach Sch B	luired to					
3	Interest	on savings and temporary cash inve						
4	Divider	nds and interest from securities		53,327	5	3,327.		ATCH 1
5 a	_	ents						
l		al income or (loss)						
		or (loss) from sale of assets not on		-367,512				
	Gross s	ales price for all 822	2,487.					
_		n line 6a —————	<del></del>					
7	•	gain net income (from Part IV,	,		<del></del>			
8		ort-term capital gain					-	
9 10 a		e modifications • • • • • • • • • • • • • • • • • • •						
, <b>u</b>		wances · · · ·						
1		ost of goods sold .			-			
		profit or (loss) (attach schedule)						
11	Other	ncome (attach schedule)		984		984.		ATCH 2
12	Total. /	Add lines 1 through 11		-63,201	5	4,311.		
13	Comper	sation of officers, directors, trustees	, etc					
14	Other e	employee salaries and wages						
15	Pensio	n plans, employee benefits	VER					
	Legal fe	ees (attach schedule)	~ = U		·			
				181				
-	Other	nting fees (attach/somedule) professional fees (attach schedu	2016	181				
	Interes	ororessional rees (attach scriedo	ner	8		<del>-</del>		
17	Interes	uttach schedule) (see page Rolling h	-					
18	Taxes (a	ittach schedule) (see page 13 of the his	trictors)				<del></del>	
15 16a b c 17 18 19 20 21 22 23 24	-	iation (attach schedule) and de		<b>J</b>				<del>                                     </del>
20		ancy						
21	Travel,	conferences, and meetings						
22		and publications						
23	Other e	expenses (attach schedule) 🗍 🗦	3]	302.		302.		
24	Total o	perating and administrative ex	cpenses.		-			<u> </u>
		es 13 through 23		302.		302.		
25		utions, gifts, grants paid		1,149,660.				1,149,66
26		enses and disbursements Add lines 2		1,149,962.		302.	· · · · · · · · · · · · · · · · · · ·	1,149,66
27		ct line 26 from line 12					· · · · · · · · · · · · · · · · · · ·	
			ante	-1,213,163.				
		f revenue over expenses and disbursem				4,009.		
		estment income (if negative, e			<del> </del>	1,000.	-0-	
1 C	Adiusto	ed net income (if negative, ente	r -U-)	•	l	1	- U <b>-</b>	İ

c Adjusted net income (if negative, enter -0-). .

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

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Form 990-PF (2009)

JSA

PAGE

Dar	t II	Ralanca Shoots	Attached schedules and amounts in the description column should be for end-of-year	Beginning of year	End of	year
	للتب	Dalance Officets	amounts only (See instructions )	(a) Book Value	(b) Book Value	(c) Fair Market Value
-	1	Cash - non-interest-beari	ing	37,457.	14,294.	14,294.
2			cash investments			
:		Accounts receivable				
			btful accounts ▶			
		Less, allowance for doul	btful accounts ▶			
,						
}			fficers, directors, trustees, and other			<del></del>
'	•					
١.	_		ach schedule) (see page 16 of the instructions)			
7			receivable (attach schedule)			
			btful accounts ▶			<del></del>
\$   £			e			
Assets			eferred charges			
४ 10			e government obligations (attach schedule)	2 121 100	1 041 400	1 600 070
		•	stock (attach schedule) ATCH 4 .	3,131,408.	1,941,408.	1,690,979.
11	1	Investments - land, buildings				
		Less accumulated deprecia	ation			
12	2	Investments - mortgage	loans			
13			ach schedule)			
14	4	Land, buildings, and	ation			
11	5	(attach schedule)	<b>-</b> )		-	
116			pleted by all filers - see the			
''			age 1, item i)	3,168,865.	1,955,702.	1,705,273.
+					2/300/1021	
17						
18						
Liabilities 21						
# <u></u> 20			ors, trustees, and other disqualified persons			
[편] 21	1	Mortgages and other no	otes payable (attach schedule)			
7 22	2	Other liabilities (describe	<b>.</b> ▶)			
23			es 17 through 22)			
		and complete lines	low SFAS 117, check here ▶ X 24 through 26 and lines 30 and 31.			
Sil	4	Unrestricted		3,168,865.	1,955,702.	
ğ  23	<del>*</del> =	Tomporouly restricted				
를 <sup>2</sup>	5 -	Temporarily restricted .			· -	
<u>m</u> 26	5	Permanently restricted ,				
š		roundations that do	not follow SFAS 117,			
빕		cneck nere and com	plete lines 27 through 31. ▶			
0 27	<i>'</i>	Capital stock, trust princ	not follow SFAS 117, plete lines 27 through 31. ▶ □			
등 28	В	Paid-in or capital surplus, or	r land, bldg , and equipment fund			
88 29		• .	ulated income, endowment, or other funds			
30	0	Total net assets or fund	d balances (see page 17 of the	2 160 065	1 055 700	
ž		instructions)		3,168,865.	1,955,702.	
31	1	Total liabilities and net	assets/fund balances (see page 17			
				3,168,865.	1,955,702.	
			anges in Net Assets or Fund E			
			alances at beginning of year - Part II,			
er	nd-d	of-year figure reported	d on prior year's return)		<u>. 1  </u>	3,168,865.
2 E	nter	amount from Part I, I	line 27a		2	-1,213,163.
<b>3</b> O	the	r increases not include	ed in line 2 (itemize) ▶		3	
						1,955,702.
			line 2 (itemize) ▶			
6 Ta	otal	net assets or fund ha	alances at end of year (line 4 minus li	ne 5) - Part II. column (b)	line 30 6	1,955,702.
<del></del>			1			Form 990-PF (2009)

G	Part IV Capital Gains	s and Losses for Tax on Inv	estment Income				
		d describe the kind(s) of property sold ( prick warehouse, or common stock, 200	<del>-</del>	(b) How ecquired P-Purchase D-Donation	(c) Date acquired (mo , day, yr )	(d) Date sold (mo , day, yr )	
18	SEE PART IV SCHE	DULE					
_1	b						
_	<u> </u>		· · · · · · · · · · · · · · · · · · ·				
_	<u>d</u>						
_	9		<u> </u>				
	(e) Gross sales price		(h) Gain or (lo (e) plus (f) mini	•			
_6	3						
_	<u> </u>	* ***		ļ	<del> </del>		
	<u> </u>						
	<u> </u>						
_	Complete only for assets s	howing gain in column (h) and owr	ed by the foundation on 12/31/69		O (O-1 /b) -		
_		(j) Adjusted basis	(k) Excess of col (i)		Gains (Col (h) g		
_	(i) F M V as of 12/31/69	as of 12/31/69	over col (j), if any		Losses (from co		
_	<u>b</u>						
	<u> </u>						
	<u>d</u>			<u> </u>			
_	•	( If	gain, also enter in Part I, line 7				
2	Capital gain net income or		(loss), enter -0- in Part I, line 7	2	_	367,512.	
3	Net short-term capital gair	n or (loss) as defined in sections 12	· · ·				
	If gain, also enter in Part I	, line 8, column (c) (see pages 13	and 17 of the instructions)				
	If (loss), enter -0- in Part I,	line 8	J	3			
F	Part V Qualification U	nder Section 4940(e) for Redu	uced Tax on Net Investment Inc	ome			
W			outable amount of any year in the ba	ase perio	d? [	Yes X No	
_			, see page 18 of the instructions be	efore mak	ing any entries		
	(a) Base penod years	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio			
_	Catendar year (or tax year beginning in)	1,055,818.	3,277,069.		(col (b) divided by	0.322184	
_	2008 2007	1,131,338.	5,389,709.			0.209907	
_	2006	869,373.	5,477,838.			0.158707	
_	2005	664,802.	5,728,958.			0.116042	
_	2004	649,633.	5,691,213.			0.114147	
_							
2	Total of line 1, column (d)			2		0.920987	
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 foun	dation has been in existence if less	s than 5 years	3		0.184197	
4	Enter the net value of nor	ncharitable-use assets for 2009 fro	m Part X, line 5	4	1	,924,932.	
						05. 5.5	
5	Multiply line 4 by line 3			5		354,567.	
6	Enter 1% of net investme	nt income (1% of Part I, line 27b)		6		540.	
7				7		355,107.	
•			• • • • • • • • • • • • • • • • • • • •		<del></del>	· · · · · · · · · · · · · · · · · · ·	
8	Enter qualifying distribution If line 8 is equal to or graph Part VI instructions on page	ons from Part XII, line 4 eater than line 7, check the box i ge 18	n Part VI, line 1b, and complete t	8 hat part	using a 1% tax	,149,660. crate See the	

Par	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 18 of t	he ins	tructio	ons)	
1 a	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 ruling letter if necessary - see instructions)				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check		5	40.	
	here $\blacktriangleright$ X 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	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) 2			4.0	
3	Add lines 1 and 2		5	40.	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) 4	0.			
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0		5	40.	
6	Credits/Payments				
	2009 estimated tax payments and 2008 overpayment credited to 2009 6a 2,159.				
	Exempt foreign organizations-tax withheld at source				
	Tax paid with application for extension of time to file (Form 8868) 6c 0 .				
	Backup withholding erroneously withheld		2 1	r 0	
7	Total credits and payments Add lines 6a through 6d		۷, ۱	59.	
8	Enter any penalty for underpayment of estimated tax. Check here If Form 2220 is attached				
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		1 6	19.	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid  Enter the amount of line 10 to be Credited to 2010 estimated tax   1,619. Refunded  11		1,0	19.	
	t VII-A Statements Regarding Activities 1,619. Refunded ▶ 11				
		1	V		
та	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it	4-	Yes	No X	
	participate or intervene in any political campaign?	1a			
D	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	4.		Х	
	of the instructions for definition)?  If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials	1 b			
	published or distributed by the foundation in connection with the activities				
_	Did the foundation file Form 4400 BOL for the upper	1c		Х	
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year	-10			
•	(1) On the foundation \$\sim_{\sim_{\text{array}}}\$ \$\sim_{\text{call}}\$ (2) On foundation managers \$\sim_{\text{s}}\$				
e	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?	2		Х	
-	If "Yes," attach a detailed description of the activities				
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of				
	incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		Х	
4 a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		Х	
ь	If "Yes," has it filed a tax return on Form 990-T for this year?	4 b		Х	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		Х	
	If "Yes," attach the statement required by General Instruction T				
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either				
	By language in the governing instrument, or		ļ		
	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	Х		
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	7	Х		
8 a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the				
	instructions) $\blacktriangleright^{IA}$ ,		ĺ		
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	8 b	Х		
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or		1		
	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		X	
0	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their			v	
	names and addresses	10		_X	

2b

3 b

4a

X No

Х

If "Yes," list the years

3a Did the foundation hold more than a 2% direct or indirect interest in any business

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)

c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . . . . .

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?

Pal	rt VII-B Statements Regarding Activities for	or Which Form 4	720 May Be Requ	ired (continued)			
5 a	During the year did the foundation pay or incur any amou	nt to					
	(1) Carry on propaganda, or otherwise attempt to influer		1 4945(e))?	. Yes X No	,		
	(2) Influence the outcome of any specific public election	(see section 4955), o	or to carry on,				
	directly or indirectly, any voter registration drive?			Yes X No	•		
	(3) Provide a grant to an individual for travel, study, or otl	ner similar purposes?		Yes X No	,		
	(4) Provide a grant to an organization other than a charitable, etc., organization described in						
	section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions)						
	(5) Provide for any purpose other than religious, charital			•			
	purposes, or for the prevention of cruelty to children or animals?						
ь	If any answer is "Yes" to 5a(1)-(5), did any of the trans						
-	Regulations section 53 4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?						
	Organizations relying on a current notice regarding disast	-		[]	· ·   <del>• · ·  </del>		
	If the answer is "Yes" to question 5a(4), does the foundation						
٠	,	•		Yes No	.		
	because it maintained expenditure responsibility for the gi				´		
_	If "Yes," attach the statement required by Regulations section						
6 a	Did the foundation, during the year, receive any funds, o	•		Yes X No			
	on a personal benefit contract?				i 1	l x	
D	Did the foundation, during the year, pay premiums, direct	ctly or indirectly, on a	personal benefit contra	ct <sup>7</sup>	6 b	— \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	
_	If "Yes" to 6b, file Form 8870						
	At any time during the tax year, was the foundation a pa	•	•		<b>—</b>		
	If yes, did the foundation receive any proceeds or have a						
Pai	t VIII Information About Officers, Directors and Contractors	, Trustees, Foun	dation Managers,	Highly Palo Emplo	oyees,		
1	List all officers, directors, trustees, foundation m	anagers and their	compensation (see	page 22 of the instru	uctions).		
	4.44	(b) Title, and average	(c) Compensation	(d) Contributions to	(e) Expense	account	
	(a) Name and address	hours per week	(If not paid, enter	employee benefit plans			
	(a) Name and address	hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	employee benefit plans and deferred compensation	other allo		
		hours per week	-0-)	employee benefit plans and deferred compensation	other allo	wances	
ĀT	TACHMENT 5	hours per week	(if not paid, enter -0-) - 0 -	employee benefit plans		wances	
ĀT		hours per week	-0-)	employee benefit plans and deferred compensation	other allo	wances	
ΑT	TACHMENT 5	hours per week	-0-)	employee benefit plans and deferred compensation	other allo	wances	
AT	TACHMENT 5	hours per week	-0-)	employee benefit plans and deferred compensation	other allo	wances	
AT	TACHMENT 5	hours per week	-0-)	employee benefit plans and deferred compensation	other allo	wances	
AT	TACHMENT 5	hours per week	-0-)	employee benefit plans and deferred compensation	other allo	wances	
ĀT	TACHMENT 5	hours per week	-0-)	employee benefit plans and deferred compensation	other allo	wances	
	TACHMENT 5  Compensation of five highest-paid employees (ot	hours per week devoted to position	-0-	employee benefit plans and deferred compensation  - 0 -	other allow	wances	
	TACHMENT 5	hours per week devoted to position	-0-	employee benefit plans and deferred compensation  - 0 -	other allow	wances	
2	TACHMENT 5  Compensation of five highest-paid employees (ot if none, enter "NONE."	hours per week devoted to position  her than those inc	-0-) -0-	employee benefit plans and deferred compensation  - 0 -  ee page 23 of the inst  (d) Contributions to employee benefit	ructions).	account,	
2	TACHMENT 5  Compensation of five highest-paid employees (ot	hours per week devoted to position	-0-	employee benefit plans and deferred compensation  - 0 -	- C	account,	
2	TACHMENT 5  Compensation of five highest-paid employees (ot if none, enter "NONE."	hours per week devoted to position  her than those inc  (b) Title, and average hours per week	-0-) -0-	employee benefit plans and deferred compensation  - 0 -  ee page 23 of the inst  (d) Contributions to employee benefit plans and deferred	ructions).	account,	
2	TACHMENT 5  Compensation of five highest-paid employees (ot if none, enter "NONE."	hours per week devoted to position  her than those inc  (b) Title, and average hours per week	-0-) -0-	employee benefit plans and deferred compensation  - 0 -  ee page 23 of the inst  (d) Contributions to employee benefit plans and deferred	ructions).	account,	
2	TACHMENT 5  Compensation of five highest-paid employees (ot if none, enter "NONE."  Name and address of each employee paid more than \$50,000	hours per week devoted to position  her than those inc  (b) Title, and average hours per week	-0-) -0-	employee benefit plans and deferred compensation  - 0 -  ee page 23 of the inst  (d) Contributions to employee benefit plans and deferred	ructions).	account,	
2	TACHMENT 5  Compensation of five highest-paid employees (ot if none, enter "NONE."  Name and address of each employee paid more than \$50,000	hours per week devoted to position  her than those inc  (b) Title, and average hours per week	-0-) -0-	employee benefit plans and deferred compensation  - 0 -  ee page 23 of the inst  (d) Contributions to employee benefit plans and deferred	ructions).	account,	
2	TACHMENT 5  Compensation of five highest-paid employees (ot if none, enter "NONE."  Name and address of each employee paid more than \$50,000	hours per week devoted to position  her than those inc  (b) Title, and average hours per week	-0-) -0-	employee benefit plans and deferred compensation  - 0 -  ee page 23 of the inst  (d) Contributions to employee benefit plans and deferred	ructions).	account,	
2	TACHMENT 5  Compensation of five highest-paid employees (ot if none, enter "NONE."  Name and address of each employee paid more than \$50,000	hours per week devoted to position  her than those inc  (b) Title, and average hours per week	-0-) -0-	employee benefit plans and deferred compensation  - 0 -  ee page 23 of the inst  (d) Contributions to employee benefit plans and deferred	ructions).	account,	
2	TACHMENT 5  Compensation of five highest-paid employees (ot if none, enter "NONE."  Name and address of each employee paid more than \$50,000	hours per week devoted to position  her than those inc  (b) Title, and average hours per week	-0-) -0-	employee benefit plans and deferred compensation  - 0 -  ee page 23 of the inst  (d) Contributions to employee benefit plans and deferred	ructions).	account,	
2	TACHMENT 5  Compensation of five highest-paid employees (ot if none, enter "NONE."  Name and address of each employee paid more than \$50,000	hours per week devoted to position  her than those inc  (b) Title, and average hours per week	-0-) -0-	employee benefit plans and deferred compensation  - 0 -  ee page 23 of the inst  (d) Contributions to employee benefit plans and deferred	ructions).	account,	
2	TACHMENT 5  Compensation of five highest-paid employees (ot if none, enter "NONE."  Name and address of each employee paid more than \$50,000	hours per week devoted to position  her than those inc  (b) Title, and average hours per week	-0-) -0-	employee benefit plans and deferred compensation  - 0 -  ee page 23 of the inst  (d) Contributions to employee benefit plans and deferred	ructions).	account,	
2	TACHMENT 5  Compensation of five highest-paid employees (ot if none, enter "NONE."  Name and address of each employee paid more than \$50,000	hours per week devoted to position  her than those inc  (b) Title, and average hours per week	-0-) -0-	employee benefit plans and deferred compensation  - 0 -  ee page 23 of the inst  (d) Contributions to employee benefit plans and deferred	ructions).	account,	
(a	TACHMENT 5  Compensation of five highest-paid employees (ot if none, enter "NONE."  Name and address of each employee paid more than \$50,000	hours per week devoted to position  her than those inc  (b) Title, and average hours per week	-0-) -0-	employee benefit plans and deferred compensation  - 0 -  ee page 23 of the inst  (d) Contributions to employee benefit plans and deferred	ructions).	account,	

Part VIII	Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Empland Contractors (continued)	oyees,
3 Five high	phest-paid independent contractors for professional services (see page 23 of the instructions). If non-	, enter "NONE."
	(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
NON	E	
Total num	ber of others receiving over \$50,000 for professional services	▶ NONE
Part IX-A	Summary of Direct Charitable Activities	
		<del></del>
	undation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number ations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A		
2		
3		-
<b>-</b>		
4		
	Summary of Program-Related Investments (see page 23 of the instructions)  the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE		Amount
1 _ 1.011.	<u></u>	
2		
-	rogram-related investments. See page 24 of the instructions	
3 NONE	i 	
	·	
Tatal Add	Unon 1 through 2	<del></del>

Pa	see page 24 of the instructions )	gn roundar _	ions,
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	1,786,392.
b	Average of monthly cash balances	1 b	167,854.
C	Average of monthly cash balances  Fair market value of all other assets (see page 24 of the instructions)	1c	0.
d	Total (add lines 1a, b, and c)  Reduction claimed for blockage or other factors reported on lines 1a and	1d	1,954,246.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)  Acquisition indebtedness applicable to line 1 assets		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,954,246.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see page 25		
	of the instructions)	4	29,314.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,924,932.
6	Minimum investment return. Enter 5% of line 5	6	96,247.
Pa	The private that I are the private 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 private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private page 25 of the	ate operating part)	)
1	Minimum investment return from Part X, line 6	1	96,247.
2 a	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	1	
		2c	540.
3	Add lines 2a and 2b  Distributable amount before adjustments Subtract line 2c from line 1	3	95,707.
4	Recoveries of amounts treated as qualifying distributions		
5	Add lines 3 and 4	5	95,707.
6	Deduction from distributable amount (see page 25 of the instructions)	6	· · · · · · · · · · · · · · · · · · ·
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII,		
	line 1	7	95,707.
Pa	art XII Qualifying Distributions (see page 25 of the instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc - total from Part I, column (d), line 26	1a	1,149,660.
b	B 1111 D 1117 B 117 B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.		<del></del>
_	purposes	2	0.
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	0.
Ь		3 b	0.
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,149,660.
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	540.
6	Adjusted qualifying distributions. Subtract line 5 from line 4		1,149,120.
-	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating v qualifies for the section 4940(e) reduction of tax in those years		<del>i</del>

42-1431745

Pa	rt XIII Undistributed income (see page	26 of the instruction	ns)		
1	Distributable amount for 2009 from Part XI,	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
	line 7				95,707.
2	Undistributed income, if any, as of the end of 2009				
а	Enter amount for 2008 only				
b	Total for pnor years 20 07 ,20 06 ,20 05				
3	Excess distributions carryover if any to 2009				
а	From 2004 366, 632.				
b	From 2005 383, 760.				}
c	From 2006 623, 133.				
d	From 2004     366, 632.       From 2005     383, 760.       From 2006     623, 133.       From 2007     867, 837.       From 2008     894, 047.				
_	From 2008 894,047.				
	Total of lines 3a through e	3,135,409.			
4					<del> </del>
	line 4 ▶ \$ 1,149,660.				
а	Applied to 2008, but not more than line 2a			· · · ·	
b	Applied to undistributed income of prior years (Election required - see page 26 of the instructions)				
С	Treated as distributions out of corpus (Election required - see page 26 of the instructions)				
d	Applied to 2009 distributable amount				95,707.
	Remaining amount distributed out of corpus	1,053,953.			
5	Excess distributions carryover applied to 2009			,	
6	(If an amount appears in column (d), the same amount must be shown in column (a) ) Enter the net total of each column as				
	indicated below:	4,189,362.			
а	Corpus Add lines 3f, 4c, and 4e Subtract line 5	4,109,302.			
	Prior years' undistributed income Subtract line 4b from line 2b				
С	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				
d	Subtract line 6c from line 6b Taxable				
е	amount - see page 27 of the instructions Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page				
	27 of the instructions				ļ. <u>-</u>
f	Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010.				
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section				
	170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8	Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	366,632.			
9	Excess distributions carryover to 2010.				-
	Subtract lines 7 and 8 from line 6a	3,822,730.			
10	Analysis of line 9				-
	Excess from 2005				
	Excess from 2006				
	Excess from 2007 867,837.				
	Excess from 2008 894,047.				
	Excess from 2009 1,053,953.	_			

_	n 990-PF (2009)				431745	Page 10		
	rt XIV Private Oper					NOT APPLICABLE		
1 a	If the foundation has				~ 1			
	foundation, and the ruling							
b	Check box to indicate wh	whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(3)						
2 a	Enter the lesser of the ad-	Tax year		Prior 3 years		(e) Total		
	justed net income from Part	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(0) 1041		
	I or the minimum investment return from Part X for each							
	year listed							
ь	85% of line 2a							
c	Qualifying distributions from Part							
·	XII, line 4 for each year listed							
d	Amounts included in line 2c not used directly for active conduct of exempt activities							
e	of exempt activities							
	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							
	<ul><li>(1) Value of all assets</li><li>(2) Value of assets qualifying</li></ul>					<del></del>		
	under section							
ь	4942(j)(3)(B)(i) "Endowment" alternative test-					<del> </del>		
-	enter 2/3 of minimum invest-							
	ment return shown in Part X,							
	line 6 for each year listed				ļ	<del> </del>		
C	"Support" alternative test - enter							
	(1) Total support other than gross investment income							
	(interest, dividends, rents,							
	payments on securities loans (section 512(a)(5))							
	or royalties)							
	(2) Support from general public and 5 or more							
	exempt organizations as							
	provided in section 4942 (j)(3)(B)(iii)							
	(3) Largest amount of sup-							
	port from an exempt organization							
	(4) Gross investment income							
Pa					ation had \$5,000	or more in assets		
	at any time o	during the year - see	e page 28 of the in	structions.)				
1	Information Regarding	g Foundation Manage	rs:					
а	List any managers of							
	before the close of any	tax year (but only if tr	iey nave contributed r	nore than \$5,000). (S	ee section 507(d)(2))			
	N/A							
b	List any managers of	the foundation who	own 10% or more of	the stock of a corp	oration (or an equally	large portion of the		
	ownership of a partner					•		
				_				
	N/A							
2	Information Regarding	g Contribution, Grant	, Gift, Loan, Scholarsh	nip, etc., Programs:				
	Check here ▶ ☐ If t	he foundation only r	nakes contributions	to preselected chari	table organizations a	nd does not accept		
	unsolicited requests f							
	organizations under ot					•		
	The name, address, a	nd telephone number	of the person to whom	n applications should b	e addressed			
•	ATTACHME		or the person to mion	in applications should b	c dadicoocd			
<u>_</u>	The form in which app		mitted and information	on and materials they	should include			
IJ	The form in which app	iloations should be sul	omitted and informatil	in and materials they	SHOULD INCIDUC			
	AN ORGANIZA	ATION FACT SHEE	T IS AVATLARLE	UPON REQUEST				
				. 5.5. 1.020001.	·			
C	Any submission deadli	1103						
	N/A							
	<del></del>	mitations on ourself	auch ca hu ====	unbinal casas at an in-	ble fields to	matitudes of stars		
d	Any restrictions or lif	mitations on awards,	such as by geogra	ipnicai areas, charita	ible fleids, kinds of I	institutions, or other		
	N/A							
JSA	N/A					5 000 PE (2000)		

Part XV Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment							
Recipient	If recipient is an individual,						
Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount			
a Paid during the year	or substantial contributor	recipient					
a Falu upining the year							
ATTACHMENT 7							
ATTACHHENT							
		ĺ					
		]					
				,			
	•						
	1						
	!						
Total	<u> </u>		<b>▶</b> 3a	1,149,660.			
b Approved for future payment		<u> </u>		· · · · · · · · · · · · · · · · · · ·			
a ripproved for fatare payment							
	•						
	<u> </u>	<u> </u>	<u> </u>				
Total	<u> </u>		<u> ▶</u> 3b				

Part XV	I-A Analysis of Income-Produ	cing Activ	/ities			-
	s amounts unless otherwise indicated		ated business income	Excluded by	section 512, 513, or 514	(e)
_	m service rèvenue	(a) Business code	(b) Amount	(c) Exclusion code	(d)	Related or exempt function income (See page 28 of the instructions)
=						tive interiories y
. –			<del></del>	<del> </del>		
						· · · · · · · · · · · · · · · · · · ·
e						<del></del>
f						<del></del>
	s and contracts from government agencies					
-	rship dues and assessments					
	on savings and temporary cash investments					
	ds and interest from securities			14	53,327.	
	ital income or (loss) from real estate					
	bt-financed property					
	debt-financed property					
	al income or (loss) from personal property					
	nvestment income		•	01	984.	
	(loss) from sales of assets other than inventory			18	-367,512.	
9 Net inc	ome or (loss) from special events					
	profit or (loss) from sales of inventory					
	evenue a					
С						
d						
е						
	al Add columns (b), (d), and (e)				-313,201.	212 221
	Add line 12, columns (b), (d), and (e)				13	-313,201.
	sheet in line 13 instructions on page 28			4.5		
Part XV	Relationship of Activities					
Line No.	Explain below how each active the accomplishment of the form					
lacktriangledown	page 29 of the instructions )	Juliuations	exempt purposes (o	uici uiaii i	by providing lands for	such purposes) (See
	page 20 of the methodisher,				<del></del>	<del></del>
						<del></del>
						<del></del>
	· · · · ·					
			NOT APPLICABL	E		
			<del></del>			· <del></del>
		_				

Pa	rt XVI	Information Exempt Orga		Transfers To and	Transact	ions a	and Relati	onship	s With N	Vonc	harit	able
1 a	in se organ Trans	ection 501(c) of the C lizations?. Ifers from the reporting f	ode (other than oundation to a n	engage in any of the n section 501(c)(3) organioncharitable exempt organi	anizations)	or in se	ection 527,	relating to	o political		Yes	No
										1a(1) 1a(2)		X
b		transactions								10(2)		
				organization						1b(1)		Х
				exempt organization						1b(2)		X
				ets						1b(3) 1b(4)		X
										1b(5)		X
				fundraising solicitations								X
	Shari	ng of facilities, equipmer	nt, mailing lists, o	ther assets, or paid employ	ees					1 c		X
d		·		Yes," complete the fol	_				-			
				nces given by the rep gement, show in colun	-							
	Value	in any transaction of	snamy arran	genient, snow in colun	iii (u) iiie	value (	or the goods	o, Olliei	assets, U	SCI VICE	3 ICC	CIVEU
(a)	Line no	(b) Amount involved	(c) Name of	noncharitable exempt organiz	ation		ription of transfe	ers, transact	tions, and shar	ng arra	ngeme	nts
		N/A				N/A						
	<u>-</u>			•								
				-							-	
	_									·		
					-							
					<del>                                     </del>							<del></del>
2 a	ls the	foundation directly or	indirectly affilia	ited with, or related to,	one or mo	re tax-ex	cempt organiz	ations de				_
	sectio	on 501(c) of the Code (oth	ner than section s	501(c)(3)) or in section 52	7?				. <b>.</b> [	Ye	s 🗀	No [
<u> </u>	If "Ye	s," complete the following		457		<del> </del>						<del></del>
		(a) Name of organization	1	(b) Type of organ	nization		(1	) Descripti	on of relations	inip		<del></del>
												<del></del>
	Hada-	nangities of narrow Lidest	are that I have	amined this return, including	200000000000000000000000000000000000000	no cohod	ulae and state	onte e	to the best :	f may be		
				of preparer (other than taxpa								
		Karen	Lim	<u>ر</u>	9	5/3/1	D <b>N</b>	Head	of CE	rP	Af	GiR
ē	S	gnature of officer or trustee	7			Date		Title	Aviva 1	USA		
Sign Here					Date		Check if	. —	Preparer's number (Se	identify e Slana	ying iture or	1
igi	aid arer's Only	Preparer's					self-employe	ed ▶∟	page 30 of t			
တ	Paid Preparer's Use Only	Firm's name (or yours if			1		<del></del>	EIN ▶		_		
	P. S.	self-employed), address,	•					<b>□</b>   1		- · · -		
		and ZIP code						Phone no	1			

#### SCHEDULE D (Form 1041)

Department of the Treasury Internal Revenue Service

## **Capital Gains and Losses**

▶ Attach to Form 1041, Form 5227, or Form 990-T. See the instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable). OMB No 1545-0092

2009

Name of estate or trust Employer identification number AVIVA CHARITABLE FOUNDATION 42-1431745 Note: Form 5227 filers need to complete only Parts I and II Short-Term Capital Gains and Losses - Assets Held One Year or Less (e) Cost or other basis (f) Gain or (loss) for (a) Description of property (b) Date acquired (c) Date sold (see page 4 of the instructions) (d) Sales price the entire year Subtract (e) from (d) (Example 100 shares 7% preferred of "Z" Co) (mo , day, yr ) (mo, day, yr) 1a b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b 1b Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts 3 Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2008 Capital Loss Net short-term gain or (loss). Combine lines 1a through 4 in column (f) Enter here and on line 13, Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year (e) Cost or other basis (f) Gain or (loss) for (a) Description of property (Example 100 shares 7% preferred of "Z" Co) (b) Date acquired (c) Date sold the entire year (d) Sales price (see page 4 of the (mo, day, yr) (mo, day, yr) Subtract (e) from (d) instructions) 6a **b** Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b....... 6b -367,512.Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 7 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts Capital gain distributions 9 Gain from Form 4797, Part I 10 10 Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2008 Capital Loss 11 Net long-term gain or (loss). Combine lines 6a through 11 in column (f) Enter here and on line 14a, -367,512.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

column (3) on the back . . . . . . . . . . . . .

Schedule D (Form 1041) 2009

_							
_	dule D (Form 1041) 2009  It III Summary of Parts I and II		(4) Danafara		(O) F-4	-4-1-	Page 2
Pa	Summary of Parts I and II  Caution: Read the instructions before completing this	nart	(1) Beneficial (see page 5		(2) Est or tru		(3) Total
13	Net short-term gain or (loss)	13	(See page (	<del>"</del> ———		-	
14		''		$\neg +$			
	Total for year	14a					-367,512.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht)	14b					<del>-  </del>
	28% rate gain						
15	Total net gain or (loss). Combine lines 13 and 14a	15					-367,512.
Note	e: If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Fo	rm 990	-T, Part I, line 4a)	If lines	14a and 1	5, colu	umn (2), are net gains, go
	art V, and <b>do not</b> complete Part IV If line 15, column (3), is a net loss, complete F	Part IV	and the Capital Los	ss Carry	over Work	sheet,	, as necessary
Pa	rt IV Capital Loss Limitation						<del></del>
16	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, I						2 000
a	The loss on line 15, column (3) or <b>b</b> \$3,000			O.T. /	341	16	3,000)
Can	The loss on line 15, column (3) or b \$3,000 or if Form 1041, pages of the loss on line 15, column (3), is more than \$3,000, or if Form 1041, pages over Worksheet on page 7 of the instructions to figure your capital loss carryove	ge 1, IIr er	ie 22 (or Form 99	u- i , iine	: 34), IS a	ioss, c	complete the Capital Loss
	Tax Computation Using Maximum Capital Gains Rate						
Forr	n 1041 filers. Complete this part only if both lines 14a and 15 in colu	umn (2	2) are gains, or a	an amo	unt is en	tered	In Part I or Part II and
	e is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is mo						
	tion: Skip this part and complete the worksheet on page 8 of the instru	ctions	ıf				
	ither line 14b, col. (2) or line 14c, col. (2) is more than zero, or oth Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.						
	n 990-T trusts. Complete this part only if both lines 14a and 15 ai	re gair	s or qualified	dıvıden	ds are in	clude	ed in income in Part I
	orm 990-T, and Form 990-T, line 34, is more than zero. Skip this pa						
eithe	er line 14b, col (2) or line 14c, col (2) is more than zero		•		_	•	
17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 3	34)	17				
18	Enter the smaller of line 14a or 15 in column (2)						
	but not less than zero						
19	Enter the estate's or trust's qualified dividends						
	from Form 1041, line 2b(2) (or enter the qualified						
	dividends included in income in Part I of Form 990-T)						
20	Add lines 18 and 19						
21	If the estate or trust is filing Form 4952, enter the						
	amount from line 4g, otherwise, enter -0 ▶ 21		<u> </u>				
22	Subtract line 21 from line 20 If zero or less, enter -0		22				
23	Subtract line 22 from line 17 If zero or less, enter -0-		23				
	5 to the						
24	Enter the smaller of the amount on line 17 or \$2,300		24				
25	Is the amount on line 23 equal to or more than the amount on line 24						
	Yes. Skip lines 25 and 26, go to line 27 and check the "No" box No. Enter the amount from line 23		25				
26	Subtract line 25 from line 24		26				
27	Are the amounts on lines 22 and 26 the same?						
	Yes. Skip lines 27 thru 30 go to line 31 No. Enter the smaller of line 17 or li	ine 22	27				
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)		28				
29	Subtract line 28 from line 27		29				
30	Multiply line 29 by 15% ( 15)					30	
31	Figure the tax on the amount on line 23 Use the 2009 Tax Rat						
	(see the Schedule G instructions in the instructions for Form 1041) $_{\scriptscriptstyle \perp}$					31	
32	Add lines 30 and 31				. <u>.</u> . , .	32	
33	Figure the tax on the amount on line 17 Use the 2009 Tax Rat						
2.4	(see the Schedule G instructions in the instructions for Form 1041).  Tax on all taxable income. Enter the smaller of line 32 or line 33					33	<del>                                     </del>
34	TAX ON AN LAXABLE INCOME. ENTER THE SMAILER OF HITE 32 OF HITE 33	11010 6	ma on colli lu	→ I. O	inedule 1		i

G, line 1a (or Form 990-T, line 36) . .

Name of estate or trust as shown on Form 1041. Do not enter name and employer identification number if shown on the other side AVIVA CHARITABLE FOUNDATION

Employer identification number 42-1431745

AVIVA CHARITABLE FOUNDATIO	N			42-143174	15		
Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year							
(a) Description of property (Example 100 sh 7% preferred of "Z" Co )	(b) Date acquired (mo , day, yr )	(c) Date sold (mo , day, yr )	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)		
6a 600 SH ISHARES BARCLAYS		00/10/0000	61 070	50.076			
AGG BD FD	02/08/2007	02/13/2009	61,073.	59,976.	1,097.		
200 SH ISHARES BARCLAYS	00/00/0007	10/12/2000	20 050	10 000	0.6.6		
AGG BD FD	02/08/2007	10/13/2009	20,858.	19,992.	866.		
700 SH ISHARES BARCLAYS AGG FD	02/08/2007	11/04/2009	72,848.	69,972.	2,876.		
50 SH ISHARES BARCLAYS AGG		11/04/2009	72,040.	09,912.	2,010.		
BD FD	03/26/2007	11/04/2009	5,203.	5,033.	170.		
800 SH ISHARES MSCI EAFE			3,233.				
FUND	12/07/2006	02/13/2009	30,942.	58,965.	-28,023.		
50 SH ISHARES MSCI EAFE			· .				
FUND	12/07/2006	02/13/2009	1,934.	3,685.	-1,751.		
650 SH ISHARES MSCI EAFE				-			
FUND	02/13/2007	02/13/2009	25,141.	48,896.	-23,755.		
600 SH ISHARES MSCI EAFE							
FUND	02/13/2007	04/14/2009	24,204.	45,134.	-20,930.		
900 SH ISHARES MSCI EAFE							
FUND	05/01/2007	04/14/2009	36,306.	71,417.	-35,111.		
250 SH ISHRES MSCI EAFE	05 (01 (0007	05 /13 /000	10 025	10 020	0 000		
FUND 400 SH ISHARES RUSSELL	05/01/2007	05/13/2009	10,935.	19,838.	-8,903.		
1000 GR INDEX	02/27/2007	06/17/2009	16,164.	22,124.	-5,960.		
225 SH ISHARES RUSSELL	02/21/2001	00/1//2009	10,104.	22,124.	3, 900.		
MIDCAP INDX FD	01/12/2007	06/17/2009	14,404.	22,881.	-8,477.		
480 SH STANDARD & POORS	01/12/2001	00/1//2003		22,001	• • • • • • • • • • • • • • • • • • • •		
DEP RECPTS	07/26/2007	05/13/2009	42,785.	70,556.	-27,771.		
600 SH STANDARD & POORS			· · · · · · ·		· · · ·		
DEP RECPTS	07/26/2007	05/21/2009	53,089.	88,195.	-35,106.		
670 SH STANDARD & POORS							
DEP RECPT	07/26/2007	06/11/2009	63,673.	98,485.	-34,812.		
130 SH STANDARD & POORS	•						
DEP RECPTS	07/27/2007	06/11/2009	12,355.	19,162.	-6,807.		
1570 SH STANDARD & POORS	07/07/0007	0.5 / 1.5 / 0.000		001 400	20 240		
DEP RECPTS	07/27/2007	06/17/2009	143,071.	231,420.	-88,349.		
30 SH STANDARD & POORS DEP RECPT	10/29/2007	06/17/2009	2 734	4,631.	-1,897.		
225 SH STANDARD & POORS	10/29/2007	00/1//2009	2,734.	4,031.	-1,097.		
DEP RECPTS	10/29/2007	06/22/2009	20,073.	34,736.	-14,663.		
200 SH STANDARD & POORS	10/23/2001	00,22,2003	20/0101	01,1001	2.,000		
DEP RECPTS	10/29/2007	08/14/2009	19,903.	30,876.	-10,973.		
220 SH STANDARD & POORS	· · · · · · · · · · · · · · · · · · ·		· · · · · · · · · · · · · · · · · · ·	·			
MIDCAP 400	12/22/2006	03/20/2009	18,557.	14,080.	4,477.		
230 SH STANDARD & POORS				***			
MIDCAP 400	12/22/2006	06/11/2009	25,064.	14,720.	10,344.		
350 SH STANDARD & POORS							
MIDCAP 400	12/22/2006	06/17/2009	36,298.	22,400.	13,898.		
150 SH STANDARD & POORS	04/02/0202	06/17/0000	15 556	00 101	C 570		
MIDCAP 400	04/03/2008	06/17/2009	15,556.	22,134.	-6,578.		
1200 SH VANGUARD INTL	08/17/2007	02/13/2009	34,050.	63,112.	-29,062.		
EQUITY INDEX FD	00/11/2007	02/13/2009	34,030.	03,112.	-29,002.		

**Employer identification number** 

Name of estate or trust as shown on Form 1041. Do not enter name and employer identification number if shown on the other side 42-1431745 AVIVA CHARITABLE FOUNDATION Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year (d) Sales price (see page 4 of the (e) Cost or other basis (see page 4 of the (b) Date (a) Description of property (Example 100 sh 7% preferred of "Z" Co) (c) Date sold (f) Gain or (loss) Subtract (e) from (d) acquired (mo , day, yr ) instructions) instructions) (mo , day, yr ) 6a 300 SH VANGUARD INTL -6,618. EQUITY INDEX FD 08/17/2007 04/14/2009 9,160. 15,778. 200 SH VANGUARD INTL EQUITY INDEX FD 09/26/2007 04/14/2009 6,107. 11,801. -5,694. -367,512. 6b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 6b . . . . . . . . . . . . Schedule D-1 (Form 1041) 2009

#### Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury .
Internal Revenue Service

Name of the organization

## **Schedule of Contributors**

► Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

Employer identification number

AVIVA CHARITABLE FOU	UNDATION	42-1431745
Organization type (check one)		
Filers of:	Section:	
Form 990 or 990-EZ	X = 501(c)(3) (enter number) organization	
	4947(a)(1) nonexempt charitable trust not treated as a private fou	indation
	527 political organization	
Form 990-PF	X 501(c)(3) exempt private foundation	
	4947(a)(1) nonexempt charitable trust treated as a private foundary	tion
	501(c)(3) taxable private foundation	
	overed by the <b>General Rule</b> or a <b>Special Rule.</b> , (8), or (10) organization can check boxes for both the General Rule and a S	Special Rule See
General Rule		
	filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 one contributor. Complete Parts I and II	or more (in money or
Special Rules		
sections 509(a)(1) a	(3) organization filing Form 990 or 990-EZ that met the 331/3 % support tesned 170(b)(1)(A)(vi), and received from any one contributor, during the year 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line	r, a contribution of the greater
the year, aggregate	(7), (8), or (10) organization filing Form 990 or 990-EZ that received from contributions of more than \$1,000 for use exclusively for religious, charitable, or the prevention of cruelty to children or animals. Complete Parts I, II, an	le, scientific, literary, or
the year, contribution aggregate to more the year for an exclusively applies to this organi	(7), (8), or (10) organization filing Form 990 or 990-EZ that received from as for use <i>exclusively</i> for religious, charitable, etc., purposes, but these contains \$1,000. If this box is checked, enter here the total contributions that we yireligious, charitable, etc., purpose. Do not complete any of the parts unless it received nonexclusively religious, charitable, etc., contributions that we will be a contribution or the parts unless it received nonexclusively religious, charitable, etc., contributions.	atributions did not ere received during the es the <b>General Rule</b> outions of \$5,000 or more
990-EZ, or 990-PF), but it <b>mus</b> t	s not covered by the General Rule and/or the Special Rules does not file So t answer "No" on Part IV, line 2 of its Form 990, or check the box on line H , to certify that it does not meet the filing requirements of Schedule B (Form	of its Form 990-EZ,
For Privacy Act and Paperwork Reduc	tion Act Notice, see the Instructions.	B (Form 990, 990-FZ, or 990-PF) (2009)

for Form 990, 990-EZ, or 990-PF.

AVIVA CHARITABLE FOUNDATION

art I Contrib	utors (see instructions)		
(a) . No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1		\$\$	Person Payroll Noncash (Complete Part II if there a noncash contribution)
a) lo.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		 \$	Person Payroll Noncash (Complete Part II if there 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 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 a noncash contribution)
a) lo.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		 \$	Person Payroll Noncash (Complete Part II if there 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

a noncash contribution)

#### 'AVIVA CHARITABLE FOUNDATION

FORM 990-PF - PART IV

Kind of F			INS AND LOSSES FOR TAX ON INVEST  Description				Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		600 SH ISHA	ARES BARCLA	YS AGG BD	FD	P	02/08/2007	02/13/200
61,073.		PROPERTY TY 59,976.	YPE: SECURI	TIES			1,097.	
			ARES BARCLA		FD	P	02/08/2007	10/13/200
20,858.		19,992.	YPE: SECURI	TIES			866.	
			ARES BARCLA			P	02/08/2007	11/04/200
72,848.		69,972.	IFE. SECORT	1155			2,876.	
		I	RES BARCLAY YPE: SECURI		D	Р	03/26/2007	11/04/200
5,203.		5,033.	ill. Obcomi	1130			170.	
		l l	ARES MSCI E. YPE: SECURI			P	12/07/2006	02/13/200
30,942.		58,965.					-28,023.	
			RES MSCI EA YPE: SECURI			Р	12/07/2006	02/13/200
1,934.		3,685.					-1,751.	
			ARES MSCI E. YPE: SECURI			P	02/13/2007	02/13/200
25,141.		48,896.					-23,755.	
			ARES MSCI E. YPE: SECURI			P	02/13/2007	04/14/200
24,204.		45,134.					-20,930.	
			ARES MSCI E. YPE: SECURI			P	05/01/2007	04/14/200
36,306.		71,417.					-35,111.	
			RES MSCI EA YPE: SECURI			Р	05/01/2007	05/13/200
10,935.		19,838.					-8,903.	
			ARES RUSSEL YPE: SECURI		INDEX	Р	02/27/2007	06/17/200
16,164.		22,124.					-5,960.	
		1	ARES RUSSEL YPE: SECURI		NDX FD	P	01/12/2007	06/17/200
14,404.		22,881.					-8,477.	
						$\perp$		

\*AVIVA CHARITABLE FOUNDATION 42-143
FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Cross sale   Depreciation   Depreciation   Cost of other   Sale   Properties   Depreciation   Department   Department   Department   Department   Department   Department   Department	CA	APITAL GAI	NS AND LO	SSES FOR	R TAX ON	INVEST	M	ENT INCOM	<u>le</u>
allowed   base   sallowed   base   sallowed   sallowe	Kınd of F	roperty		Desci			or D	acquired	Date sold
PROPERTY TYPE: SECURITIES 70,556.  -27,771.  600 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 88,195.  670 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 98,485.  130 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 19,162.  1370 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 19,162.  1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 19,162.  1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 19,162.  1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 231,420.  30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  10/29/2007 06/17, -1,897.	price less	allowed/	other	as of	as of	FMV over		or	
TOTAL GAIN(LOSS)  600 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 88,19535,106.  670 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 98,48534,812.  130 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 19,1626,807.  1143,071. 1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 19,1626,807.  143,071. 231,42088,349.  30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 231,42088,349.  30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES -88,349.  30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES -88,349.  31 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES -88,349.  32 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES -1,897.  2,734. 4,6311,897.			i e			TS	Р	07/26/2007	05/13/2009
600 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 88,195.  670 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 98,485.  130 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 12,355.  1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 19,162.  1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 231,420.  30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPTS P 10/29/2007 06/17, PROPERTY TYPE: SECURITIES -1,897.	42,785.		l .	PE: SECURIT	'IES			-27,771.	
600 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 88,195.  670 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 98,485.  130 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 12,355.  1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 19,162.  1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 231,420.  30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPT P 10/29/2007 06/17, 10/29/2007									
600 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 88,195.  670 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 98,485.  130 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 12,355.  1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 19,162.  1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 231,420.  30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPT P 10/29/2007 06/17, 10/29/2007									
600 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 88,195.  670 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 98,485.  130 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 12,355.  130 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 19,162.  1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 231,420.  30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPT P 10/29/2007 06/12/									
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600 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 88,195.  670 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 98,485.  130 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 12,355.  130 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 19,162.  1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 231,420.  30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPTS P 10/29/2007 06/12/									
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PROPERTY TYPE: SECURITIES 88,195.  670 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 98,485.  130 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 19,162.  1570 SH STANDARD & POORS DEP RECPTS 19,162.  1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 231,420.  30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  10/29/2007 06/22/	TOTAL GAIN(L	oss)							
53,089.       88,195.       -35,106.         670 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 98,485.       P 07/26/2007 06/11, 06/11, 07/207         12,355.       130 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 19,162.       P 07/27/2007 06/11, 06/11, 07/207         1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 231,420.       P 07/27/2007 06/17, 06/						TS	Р	07/26/2007	05/21/2009
PROPERTY TYPE: SECURITIES 98,485.  130 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 12,355.  1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 231,420.  30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 231,420.  30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPT P 10/29/2007 06/17, PROPERTY TYPE: SECURITIES 4,631.  10/29/2007 06/22,	53,089.		E .	PE: SECURIT	IES			-35,106.	
63,673. 98,48534,812. 130 SH STANDARD & POORS DEP RECPTS POPERTY TYPE: SECURITIES 12,355. 19,1626,807. 1570 SH STANDARD & POORS DEP RECPTS POPERTY TYPE: SECURITIES 231,42088,349. 30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,6311,897. 225 SH STANDARD & POORS DEP RECPTS P 10/29/2007 06/22/						Т	Р	07/26/2007	06/11/2009
PROPERTY TYPE: SECURITIES  19,162.  1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 231,420.  30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPT P10/29/2007 06/17, PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPTS P 10/29/2007 06/22,	63,673.			PE: SECURIT	'IES			-34,812.	
12,355. 19,1626,807. 1570 SH STANDARD & POORS DEP RECPTS PROPERTY TYPE: SECURITIES 231,42088,349. 30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,6311,897. 225 SH STANDARD & POORS DEP RECPT P10/29/2007 06/22/						TS	Р	07/27/2007	06/11/2009
PROPERTY TYPE: SECURITIES 231,420.  30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPTS P 10/29/2007 06/17, 25 SH STANDARD & POORS DEP RECPTS P 10/29/2007 06/22,	12,355.			PE: SECURIT	IES			-6,807.	
231,420.  30 SH STANDARD & POORS DEP RECPT PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPTS P 10/29/2007 06/22/			1570 SH STA	NDARD & POC	RS DEP REC	PTS	Р	07/27/2007	06/17/2009
PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPTS P 10/29/2007 06/22	143,071.		ť	PE: SECURIT	IES			-88,349.	
PROPERTY TYPE: SECURITIES 4,631.  225 SH STANDARD & POORS DEP RECPTS P 10/29/2007 06/22			30 SH STAND	ARD & POORS	DEP RECPT		P	10/29/2007	06/17/2009
225 SH STANDARD & POORS DEP RECPTS P 10/29/2007 06/22	2,734.		PROPERTY TY						
	, .			DARD & POOR	S DEP RECP	ГS		·	06/22/2009
						- ~		20,25,200,	20, 22, 2003
JSA	ISA .								

AVIVA CHARITABLE FOUNDATION

FORM 990-PF - PART IV

CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Pi	roperty	Description pr				Date	Date sold	
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis	D	acquired Gain or (loss)	· · · · · · · · · · · · · · · · · · ·
20,073.		34,736.	12/3/1/3	12/4///	1 201 20010		-14,663.	
						:		
OTAL GAIN(LC	oss)			• • • • • • • • • • • •				
		200 SH STAN PROPERTY TY			TS	Ρ	10/29/2007	08/14/200
19,903.		30,876.					-10,973.	
		220 SH STAN PROPERTY TY			00	Ρ	12/22/2006	03/20/200
18,557.		14,080.					4,477.	
25 264		230 SH STAN PROPERTY TY			00	P	12/22/2006	06/11/200
25,064.		14,720. 350 SH STAN	DADD C DOO	DC MIDCAD 4	0.0	P	10,344.	06/17/200
36,298.		PROPERTY TY 22,400.			00	P	13,898.	06/1//200
30,290.		150 SH STAN	DARD & POO	RS MIDCAP 41	<b>n</b> n	D	04/03/2008	06/17/200
15,556.		PROPERTY TY 22,134.			00		-6,578.	00/1//200
_0,000.		1200 SH VAN			EX FD	P	08/17/2007	02/13/200
		PROPERTY TY	PE: SECURI	TIES		П		

· AVIVA CHARITABLE FOUNDATION
FORM 990-PF - PART IV

	AINS AND LU	INS AND LOSSES FOR TAX ON INVEST					Date	
Kind of Property		Desc	ription			0	acquired	Date sold
Gross sale Depreciation	Cost or	FMV	Adj bas	sis	Excess of	М	Gain	
price less allowed/	other	as of	as of		FMV over ad basis		or (loss)	
expenses of sale allowable	basis	12/31/69	12/31/6	9	_ aoj basis	H	(1055)	-
34,050.	63,112.						-29,062.	1
51,0001	00,22						,	
						П		
						П		
						Н		
						Н		
						П		
						П		
						П		
						П		
TOTAL GAIN(LOSS)						$\cdot   \  $		
	300 SH VANG	UARD INTL	EQUITY I	NDEX	FD	P	08/17/2007	04/14/2009
	PROPERTY TY	PE: SECURI	ΓΙΕS					
9,160.	15,778.						-6,618.	
						H		
	200 SH VANG	UARD INTL	EQUITY I	NDEX	FD	P	09/26/2007	04/14/2009
	PROPERTY TY					П		
6,107.	11,801.						-5,694.	
0,107.	11,001.						0,051.	•
						H		
TOTAL GAIN(LOSS)							-367,512.	
101711 07111 (1000)							= 30173121	
						П		
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ATTACHMENT 1

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NET INVESTMENT INCOME	53,327.	
REVENUE AND EXPENSES PER BOOKS	53,327.	
	TOTAL	
DESCRIPTION	DIVIDENDS & INTEREST	

PAGE 21

7
<b>LTACHMENT</b>
AT

FORM 990PF, PART I - OTHER INCOME

NOI	EMENT
IPJ	SETTL
DESCR	AOL

	NET	INVESTMENT	INCOME	984.
KEVENUE	AND	EXPENSES	PER BOOKS	984.

984.

984.

TOTALS

ATTACHMENT

ATTACHMENT 3

# OTHER EXPENSES ı PART I FORM 990PF,

NET	INVESTMENT INCOME 302.	
REVENUE AND	EXPENSES PER BOOKS 302.	
	ν	
	DESCRIPTION INVESTMENT EXPENSES	

302.

302.

TOTALS

CORPORATE STOCK

i

PART

FORM 990PF,

ATTACHMENT

4

ATTACHMENT

DESCRIPTION	ENDING BOOK VALUE	ENDING <u>FMV</u>
ISHARES BARCLAYS AGG BD FD THE FINANCIAL SEL SECT SPDR FD MSCI EAFE FUND RUSSELL MIDCAP INDEX FUND S&P DEP RECEIPTS S & P MIDCAP 400 VANGUARD INTL EQUITY INDEX FUN RUSSELL 1000 GR INDEX	483,460. 120,458. 139,690. 140,359. 512,992. 216,320. 91,849. 236,280.	490,1 72,0 96,7 121,7 1942,9 197,6
CTUTOT	1, 24 1, 400.	100011

0,15	96,74	2,97	65	1,690,979.
83,4	39,6 40,3	9,79	91 36	1,941,408.

ATTACHMENT

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

NAME AND ADDRESS

TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION

MARK V. HEITZ

DIRECTOR

699 WALNUT STREET

20TH FLOOR

DES MOINES, IA 50309

BRENDA CUSHING

699 WALNUT STREET 20TH FLOOR

DES MOINES, IA 50309

TREASURER

699 WALNUT STREET 20TH FLOOR

CHRISTOPHER J. LITTLEFIELD

DES MOINES, IA 50309

PRESIDENT

KAREN LYNN

VICE PRESIDENT

699 WALNUT STREET

20TH FLOOR

DES MOINES, IA 50309

MICHAEL H. MILLER 699 WALNUT STREET

20TH FLOOR

DES MOINES, IA 50309

SECRETARY

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ATTACHMENT 5 (CONT'D)

12:55:19 PMV 09-4.3

ATTACHMENT

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

NAME AND ADDRESS

TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION

LINDA OLSON

ASSISTANT SECRETARY

699 WALNUT STREET 20TH FLOOR DES MOINES, IA 50309

GRAND TOTALS

ATTACHMENT 6

FORM 990,PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

KAREN LYNN
699 WALNUT STREET, 20TH FLOOR
DES MOINES, IA 50309
515-557-3910

ATTACHMENT 7

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GRANTS AND CO
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	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR	•	•
	AND		
RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMÓUNT
MCKINLEY SCHOOL	NONE	PROVIDE BOOTS AND COATS FOR STUDENTS	24,643
1610 SE 6TH	EXEMPT		
DES MOINES, IA 50315			
ATTACHMENT SEE ATTACHMENT 8	NONE	VARIOUS - SEE ATTACHED SCHEDULE.	1,125,017

1,149,660
TOTAL CONTRIBUTIONS PAID

ATTACHMENT 7

AmerUs Group Charitable Foundation Grants and Contributions Paid During the Year Elm 424-1431745 Form 990 PF, Part XV For Calendar Year 2009

Ceder Ripuds, IA, 50309   300   none	eater Des Moines an Cancer Society an Heart Association an Red Cross-Central Iowa Chapter is Foundation in Collège	Dec Mainer 1A 50300				
on         Cedar Readors, 1A 52402         25.000         none           on         Des Monres, 1A 50324-324         55.000         none           tital lowe Chapter         Des Monres, 1A 50324-324         4575         none           Des Monres, 1A 50325-4300         1000         none           Des Monres, 1A 50325-5900         1000         none           Che, 1A 50325-5900         2.500         none           Des Monres, 1A 50325-5900         3.000         none           Polit, 1A 50219         3.000         none           Chorage Monres, 1A 50325         3.000         none           Chorage	in Cancer Society in Heart Association in Red Cross-Central Iowa Chapter Foundation es Monies	Des Molles, in accos	300	none	exempt	Health & Human Services
Open Momes, IA 50314-2527         5,000         none           Des Momes, IA 50324-724         1,000         none           Des Momes, IA 50324-734         1,000         none           Des Momes, IA 50324-1912         2,500         none           Des Momes, IA 50325-690-6         2,500         none           Clote, IA 50325-690-6         7,500         none           Des Momes, IA 50326-690-6         7,500         none           Clote, IA 50326-690-6         7,500         none           Des Momes, IA 5031-6667         5,000         none           Pella, IA 50219         1,000         none           Des Momes, IA 50321         1,000         none           Des Momes, IA 50329         32,000         none           Chicago, IL 60602-2711         1,000         none           Des Momes, IA 50309         32,000         none           Chicago, IL 60602-2711         1,000         none           Chicago, IL 60602-2711         1,000 <td>in Heart Association in Red Cross-Central lowa Chapter Foundation g College</td> <td>Cedar Rapids, IA 52402</td> <td>25,000</td> <td>none</td> <td>exempt</td> <td>Health &amp; Human Services</td>	in Heart Association in Red Cross-Central lowa Chapter Foundation g College	Cedar Rapids, IA 52402	25,000	none	exempt	Health & Human Services
pter Des Monnes, IA 50329 1,000 none  Des Monnes, IA 50324-734 4875 none  Des Monnes, IA 50324-1350 500 none  Des Monnes, IA 50325-6900 7,500 none  Des Monnes, IA 50315-6867 5,500 none  Des Monnes, IA 50315-6867 5,000 none  Des Monnes, IA 50315-6867 5,000 none  Des Monnes, IA 50321 100 none  Des Monnes, IA 50321 100 none  Des Monnes, IA 50329 1,000 none  Des Monnes, IA 50340 3,000 none  Chorado Springs, CO 80903 5,000 none  Chorado Springs, CO 80903 5,000 none  Chorado Springs, CO 80903 15,000 none  Chorado Springs, IA 50329 15,000 none  Des Monnes, IA 50329 2,000 none  Des Monnes, IA 50332 2,000 none  Des Monnes, IA 50	n Red Cross-Central lowa Chapter Foundation gollege ss Mornes	Des Moines, IA 50314-2527	5,000	впоп	exempt	Health & Human Services
Des Monnes, IA 50322-4724 4,875 nore  Memapapolis, NN 56454-1356 500 nore  Des Monnes, IA 50326-1912 2,500 nore  Civie, IA 50326-5907 7,500 nore  Des Monnes, IA 50316-6667 5,000 nore  Indianapolis, IN 46208 100 100 nore  Des Monnes, IA 50321 100 nore  Des Monnes, IA 50321 100 nore  Des Monnes, IA 50321 100 nore  Des Monnes, IA 50329 3,000 nore  Des Monnes, IA 50309 5,000 nore  Cincago, IL 60602-2711 1,000 nore  Cincago, IL 60602-2711 1,000 nore  Des Monnes, IA 50309 5,000 nore  Cincago, IL 60602-2711 1,000 nore  Des Monnes, IA 50309 5,000 nore  Des Monnes, IA 50309 15,000 nore  Des Monnes, IA 50309 10,000 nore  Des Monnes, IA 50309 12,000 nore  Des Monnes, IA 50309 2301 2,500 nore  Des Monnes, IA 50309 2301 2,500 nore  Des Monnes, IA 50309 2321 2,500 nore  Des Monnes, IA 50309 200 1,500 nore  Des Monnes, IA 50300 200 200 200	Foundation g College ss Moines	Des Moines, IA 50309	1,000	none	exempt	Health & Human Services
Des Monnes, IA 5039-1312 2,500 none Des Monnes, IA 50315-8667 2,500 none Cive, IA 50325-8900 7,500 none Des Monnes, IA 50315-8667 5,500 none Des Monnes, IA 50315-8667 5,000 none Des Monnes, IA 50315-8667 5,000 none Pella, IA 50321 100 none Des Monnes, IA 50319 100 none Des Monnes, IA 50321 100 none Des Monnes, IA 50309 5,000 none Des Monnes, IA 50309 5,000 none Des Monnes, IA 50309 5,000 none Des Monnes, IA 50304-1676 5,000 none Des Monnes, IA 50304-1676 5,000 none Des Monnes, IA 50309 1,000 none Des Monnes, IA 50309 2,000 1,000 none Des Monnes, IA 50309 2,000 none Des	g College ss Mones	Des Moines, IA 50322-4724	4,875	none	exempt	Health & Human Services
Des Montes, IA 50309-1912 2.500 none Clive, IA 50325-6900 7.500 none Clive, IA 50325-6900 7.500 none Clive, IA 50315-6900 7.500 none Des Montes, IA 50315-6907 5.000 none Indianapolis, IN 46208 1.150 none Des Montes, IA 50321 100 none Des Montes, IA 50332 100 none Des Montes, IA 50332 100 none Des Montes, IA 50332 5.000 none Chicago, IL 60602-2711 1.000 none Chicago, IL 60602-2711 1.000 none Des Montes, IA 50339 5.00 none Glar, NE 68008 2.000 none Des Montes, IA 50339 15.000 none Des Montes, IA 50339 12.000 none Des Montes, IA 50339 2321 2.500 none Des Montes, IA 50331 2.500 none Des Montes, IA 50332 2.500 none Des Monte	s Moines	Minneapolis, MN 55454-1350	200	попе	exempt	Education
Des Monres, IA 50325   2,500   none	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	Des Moines, IA 50309-1912	2,500	поле	exempt	Arts & Culture
Clive, IA 50325-6900  Des Monnes, IA 50315-6667  Indianapolis, IN 46208  Pella, IA 50219  Des Monnes, IA 50321  Colorado Sprones, IA 50324  Colorado Sprones, IA 50309  Des Monnes, IA 50309  Colorado Sprones, IA 50309  Des Monnes, IA 50309  Des Monnes, IA 50309  Des Monnes, IA 50309  Crete, NE 68333  Crete, IA 50309  Des Monnes, IA 50309  Des Monnes, IA 50309  Crete, IA 50309  Des Monnes, IA 50309  Crete, IA 50309  Des Monnes, IA 50309  Crete, IA 50	idies Iowa	Des Moines, IA 50325	2,500	none	exempt	Health & Human Services
Des Monnes, IA 50315-6667 5,000 none indianapolis, IN 46208 7,150 none Fella, IA 50219 100 none indianapolis, IN 46208 1,150 none Des Monnes, IA 50321 100 none Des Monnes, IA 50329 5,000 none Des Monnes, IA 50309 5,000 none Des Monnes, IA 50314-1676 2,000 none Chicago, IL 66062-2711 1,000 none Blair, NE 68008 5,000 none Chicago, IL 66062-2711 1,000 none Blair, NE 68008 5,000 none Chicago, IL 66062-2711 1,000 none Des Monnes, IA 50314-505 15,000 none Indianal, IA 50125 15,000 none Des Monnes, IA 50309 15,000 none Indianal, IA 50125 15,000 none Des Monnes, IA 50309 17,000 none Des Monnes, IA 50309 17,000 none Des Monnes, IA 50309 12,000 none Des Monnes, IA 50309 17,000 none Des Monnes, IA 50309 17,000 none Faniklel, CT 06824 15,000 none Des Monnes, IA 50309 7,500 none Des Monnes, IA 50309 7,500 none Hurthrigton, IN 46730 7,500 none Hurthrigton, IN 46730 7,500 none Des Monnes, IA 50309 7,500 none Des Monnes, IA 50309 7,500 none Des Monnes, IA 50309 7,500 none Hurthrigton, IN 46730 7,500 none Des Monnes, IA 50314-314 2,500 none Des Monnes, IA 50314-314 3,500 non	ners Big Sisters	Clive, IA 50325-6900	7,500	none	exempt	Health & Human Services
Indianapoines, IA 6208 6 100 none relative by 8000 100 none relative b	ark Zoo	Des Moines, IA 50315-6667	5,000	none	exempt	Civic & Community
Indianapols, IN 46208   1,150   none	reater Des Moines Foundation	Des Moines, IA	2,000	поле	exempt	Arts & Culture
Pella, IA 50219  Des Monnes, IA 50321  Des Monnes, IA 50329  Des Monnes, IA 50309  Colorado Springs, CO 80903  Col	nversity	Indianapolis, IN 46208	1,150	none	exempt	Education
Des Monres, IA 50321 100 none New York, NY 10005 500 none Des Monres, IA 50309 5,000 none Des Monres, IA 50309 5,000 none Des Monres, IA 50309 32,000 none Cincardo Springs, CO 80903 5,000 none Cincardo Springs, CO 80903 5,000 none Elair, NE 68006 C22711 1,000 none Des Monres, IA 50312-2099 15,000 none Des Monres, IA 50309 20,000 none Des Monres, IA 50309 17,500 none Des Monres, IA 50309 10,000 none Des Monres, IA 50309 2321 15,000 none Des Monres, IA 50309 2321 2,500 none Des Monres, IA 50309 2321 2,5	College	Pella, IA 50219	100	none	exempt	Education
Performation   New York, NY 10005   500   none	and Families of Iowa	Des Mornes, IA 50321	100	попе	exempt	Health & Human Services
diation         Des Moines, IA 50309         5,000         none           diaton         Des Moines, IA 50309         35,000         none           scoaten         Des Moines, IA 50314-1676         2,000         none           att St. Joseph         Colorado Springs, CO 80903         50         none           cheeped         Colorado Springs, CO 80903         50         none           cheeped         Colorado Springs, CO 80903         50         none           stry         Chicago, IL, 60602-2711         1,000         none           stry         Bart, KE 66008         500         none           located Springs, CO 80903         15,000         none           located Springs, CO 80903         17,000         none           located Springs, CO 80903         17,000         none           located Springs, Ir, KE 60008         17,000         none           located Moines, IA 50309         17,000         none           located Moines, IA 50309 </td <td>s Tumor Foundation</td> <td>New York, NY 10005</td> <td>200</td> <td>поле</td> <td>exempt</td> <td>Health &amp; Human Services</td>	s Tumor Foundation	New York, NY 10005	200	поле	exempt	Health & Human Services
Considerate Des Moines         LA 50309         32,000         none           Concardes         Des Moines, IA 50304 - 1576         20,000         none           At Subseth         Concarde Springs, CO 80903         30,000         none           de Chicago, IL 60602 2711         1,000         none           de Chicago, IL 60602 2711         1,000         none           de Chicago, IL 60602 2711         1,000         none           Grencastle, IN 46135-0037         15,000         none           Cherago, IL 60602 2711         1,000         none           Blair, KE 68008         20,000         none           Cherago, IL 60602 2711         1,000         none           Des Moines, IA 50309         17,500         none           blic Library         Des Moines, IA 50309         1,100         none           blic Library         Des Moines, IA 50309         1,100         none           sty         Des Moines, IA 50309         1,200         none           Manachator         Des Moines, IA 50309         1,500         none           Manachator         Des Moines, IA 50309         1,000         none           Meres Des Moines, IA 50309         1,000         none           Meres Des Moines, IA 5030	s Foundation	Des Moines, IA 50309	5,000	none	exempt	Education
speciation         Des Mones, IA 50314-1676         2,000         none           rt St Joseph         Concannat, OH 45233         50         none           rt St Joseph         Colorado Springs, CO 8003         50         none           rt St Joseph         Colorado Springs, CO 8003         50         none           rt St Festiva         Enemaratio, In 6602-2711         1,000         none           Blast, NE 68003         I 6000         50         none           Blast, NE 68008         Spon         none           R Festival         Des Monnes, IA 50325         17,500         none           blic Christy         Des Monnes, IA 50309         17,500         none           blic Lhrary         Des Monnes, IA 50125         30,000         none           blic Lhrary         Des Monnes, IA 50309         17,000         none           blic Lhrary         Des Monnes, IA 50309         12,000         none           blic Lhrary         Des Monnes, IA 50309         12,000         none           blic Christia         Crefe, IR 68333         12,000         none           blic Christia         Crefe, IR 68333         12,000         none           blic St Archardation         Des Monnes, IA 50309         17,000	nter of Greater Des Moines	Des Moines, lA 50309	32,000	поп	ехетрt	Arts & Culture
St. Joseph	sic Association	Des Moines, IA 50314-1676	2,000	none	exempt	Arts & Culture
Colorado Springs, CO 80903   50   none stray	of Mount St Joseph	Cincinnati, OH 45233	. 20	поп	ехетр	Education
Chicago, IL 60602-2711   1,000 none starty	College	Colorado Springs, CO 80903	20	HOU	ехето	Education
Blair, NE 68008   500	Juversity	Chicago, IL 60602-2711	1,000	enou	exempt	Education
Content	llege	Blar. NE 68008	200	none	exempt	Education
1,000   1,00	University	Greencastle, IN 46135-0037	150	none	exempt	Education
Is Festival         Des Monnes, IA 50125         20,000         none           Taro Opera, Inc         Indianola, IA 50125         17,500         none           birc Opera, Inc         Des Mornes, IA         80,000         none           birc Lbrary         Des Mornes, IA         50309         12,000         none           mphory         Des Mornes, IA         5000         none         26,000         none           versify         Crele, Mornes, IA         50309         1,100         none         26,000         none           v         Des Mornes, IA         50314-4505         1,100         none         1,100         none         none           v         Des Mornes, IA         50309         1,100         none         none <t< td=""><td>nes Art Center</td><td>Des Moines, IA 50312-2099</td><td>15,000</td><td>none</td><td>exempt</td><td>Arts &amp; Culture</td></t<>	nes Art Center	Des Moines, IA 50312-2099	15,000	none	exempt	Arts & Culture
the Opera, Inc.  Indianola, IA 50125  the Chera, Inc.  Indianola, IA 50125  the Chera, Inc.  Indianola, IA 50125  Inc.	nes Arts Festival	Des Mornes, IA 50309	20,000	none	exempt	Arts & Culture
bits         Library         Des Monnes, IA         80,000         none           bible Schools         Des Monnes, IA         5000         none           mphony         Des Monnes, IA         50309         12,000         none           wersrify         Des Monnes, IA         5031-4505         1,100         none           ty         Des Monnes, IA         5031-4505         1,100         none           ty         Des Monnes, IA         5039         1,000         none           sty         Des Monnes, IA         5039         1,000         none           sty         Fairfield, CT 06824         1,000         none           sty         Fairfield, CT 06824         1,000         none           sty         Des Monnes, IA         50316         1,000         none           onnes Community Foundation         Des Monnes, IA         5035         none           onnes Community Foundation         Des Monnes, IA         5026-4730         7,500         none           oundation         Des Monnes, IA         5036-4730         7,500         none           oundation         Des Monnes, IA         50309-2321         2,50         none           entrage Foundation         Des Monnes, IA	ies Metro Opera, Inc	Indianola, IA 50125	17,500	попе	exempt	Arts & Culture
bes Monnes, IA         9,800         none           mphony         Des Monnes, IA 50309         12,000         none           mphony         Des Monnes, IA 50313         250         none           Versity         Crette, NE 68333         250         none           Particul         Crette, NE 68333         250         none           Particul         Crette, NE 68333         250         none           Durham, NC 27708-0581         50         none           Particul         Crette, NE 68339         1,100         none           Sty         Frankin, IN 46131-2623         150         none           Bos Monnes, IA 50316         75,000         none           Des Monnes, IA 50309         75,000         none           Versity         Huntington, IN 46750         1,00         none           Versity         Huntington, IN 47809-1202         350         none           Versity         Bioministry, IN 47402         350         none           Arrivaty         Bioministry, IN 47402         350         none           Brownington, IN 47402         2,500         none           Des Moines, IA 50309-2396         7,000         none           Arrivaty         Appleion, WI	les Public Library	Des Mornes, IA	80,000	none	exempt	Civic & Community
mphony         Des Monnes, IA 50309         12,000         none           Inversity         Crete, NE 603144505         1,100         none           Crete, NE 603144505         1,100         none           My         Des Monnes, IA 50309         1,000         none           Bos Monnes, IA 50309         1,000         none           Stry         Frankin, IV 46131-2623         350         none           Bos Monnes, IA 50316         1,100         none           Bonnes Community Foundation         Des Monnes, IA 50309         75,000         none           Intral lowa         Des Monnes, IA 50325         5,000         none           Intral lowa         West Des Monnes, IA 50325         1,00         none           Versity         Huntington, IN 46750         1,00         none           Versity Foundation         Des Monnes, IA 50309-1202         1,500         none           Sity Foundation         Des Monnes, IA 50309-2396         7,000         none           Arriage Foundation         Des Monnes, IA 50309-2396         7,000         none           Bernington, IN 54911         1,000         none         1,500         none           Arriage         Foundation         Des Monnes, IA 50309-2321         2,500 <td>les Public Schools</td> <td>Des Mornes, IA</td> <td>008'6</td> <td>non</td> <td>exempt</td> <td>Education</td>	les Public Schools	Des Mornes, IA	008'6	non	exempt	Education
Inversity         Des Moines, IA B 68333         5,000         none           I, Y         Crete, NE 68333         250         none           I, Y         Des Moines, IA 5030-581         1,00         none           I, Y         Des Moines, IA 50309         1,000         none           Sity         Fairfield, CT 06824         150         none           Illege         Des Moines, IA 50316         1,100         none           Illege         Des Moines, IA 50329         2,500         none           Incest Community Foundation         Des Moines, IA 50309         7,500         none           Intra lowa         West Des Moines, IA 50309         7,500         none           Intra lowa         West Des Moines, IA 50309         7,500         none           Intra lowa         West Des Moines, IA 50309-2024         1,50         none           Intra lowa         West Des Moines, IA 50309-2024         1,50         none           Intra lowa         Hurtington, IN 47402         3,50         none           Oundation         Des Moines, IA 50309-2336         7,000         none           Intra lowa         Moines, IA 50309-2321         2,500         none           Inform         Des Moines, IA 50309-2321	es Symphony	Des Moines, IA 50309	12,000	none	exempt	Arts & Culture
ty         Crete, NE 68333         250         none           V.         Des Moines, IA 50311-4505         1,100         none           V.         Durham, NC 27708-0581         50         none           Sity         Famifield, CT 06824         150         none           enter Franklin, IN 46131-2623         1,100         none           ones Moines, IA 50316         1,100         none           Des Moines, IA 50326         75,000         none           on         Des Moines, IA 50322         5,000         none           on         Des Moines, IA 50322         5,000         none           versity         Hurtington, IN 46750         1,00         none           versity         Hurtington, IN 47402         3,50         none           oundation         Des Moines, IA 50309-2396         7,500         none           deriage Foundation         Des Moines, IA 50309-2396         7,000         none           dering Inform         Des Moines, IA 50313         2,500         none           dersity         Ampieton, WI 54011         1,000         none           dersity         Appieton, WI 54011         1,000         none           dersity         Appieton, WI 54011         1,000<	es University	Des Moines, IA	5,000	none	exempt	Education
ty         Des Monnes, IA 50311-4505         1,100         none           V.         Durhan, NC 27708-0581         50         none           Durhan, NC 27708-0581         50         none           Des Monnes, IA 50309         10,000         none           Indescription         Des Monnes, IA 50316         1,100         none           Des Monnes, IA 50309         75,000         none           Des Monnes, IA 50322         5,000         none           Des Monnes, IA 50322         5,000         none           Des Monnes, IA 50322         1,00         none           Versity         Huntington, IN 46750         1,500         none           Aurdation         Des Monnes, IA 50309-2396         7,000         none           Aurdation         Des Monnes, IA 50309-2396         7,000         none           Des Monnes, IA 50313         2,500         none           Des Monnes, IA 50309-2336         2,000         none           Ames, IA 50014-7164         2,475         none           Appieton, WI 54911         1,000         none           Appieton, WI 54911         1,000         none           Urbandale, IA 52101         1,000         none           Urbandale, IA 52101	ollege	Crete, NE 68333	250	none	exempt	Education
y.         Durham, NC 27708-0581         50         none           stry         Familia, IV 62708-0581         50         none           stry         Familia, IV 46131-2623         10,000         none           e         Familia, IV 46131-2623         350         none           ellege         Des Moines, IA 50316         75,000         none           on         Des Moines, IA 50329         75,000         none           pos Moines, IA 50322         5,000         none           pos Moines, IA 50322         7,000         none           Inversity         Hurtington, IN 46750         100         none           Inversity         Des Moines, IA 5039-2396         7,000         none           cundation         Des Moines, IA 5039-2396         7,000         none           deriage Foundation         Des Moines, IA 50314         2,500         none           deriage Foundation         Des Moines, IA 50313         2,500         none           Ames, IA 50014-7164         2,475         none           Inversity         Appleton, IVI 54911         2,475         none           Instraction         Des Moines, IA 50313         2,000         none           Instraction         Des Moines, IA 50325	iversity	Des Moines, IA 50311-4505	1,100	попе	exempt	Education
sty         Farrfield, CT 06824         10,000         none           sty         Farrfield, CT 06824         15,000         none           liege         Des Monres, IA 50316         1,100         none           oines Community Foundation         Des Monres, IA 50309         75,000         none           on         Des Monres, IA 50322         2,500         none           stratal lowa         Worst Des Moines, IA 50265-4730         7,500         none           Aurithoria Moines, IA 50322         1,500         none           Aliversity         Huntington, IN 47402         350         none           oundation         Des Moines, IA 50309-2396         7,000         none           deriage Foundation         Des Moines, IA 50314         2,500         none           deristly Foundation         Des Moines, IA 50314         2,500         none           deristly Foundation         Des Moines, IA 50314         2,500         none           deristly Foundation         Des Moines, IA 50313         2,500         none           deristly         Appleton, WI 54911         1,000         none           deristly         Des Moines, IA 50325         2,000         none           deristly         Des Moines, IA 50325	versity.	Durham, NC 27708-0581	20	none	exempt	Education
Familia, IX 108824 150 none Pranklin, IX 46131-2623 350 none Des Moines, IA 50309 75,000 none Des Moines, IA 50322 5,000 none Des Moines, IA 50322 5,000 none Des Moines, IA 50322 5,000 none West Des Moines, IA 50265-4730 7,500 none Huttington, IN 47809-1202 150 none Bloomington, IN 47809-1202 350 none Des Moines, IA 50309-2396 7,000 none Des Moines, IA 50309-2321 2,500 none Des Moines, IA 50309-321 2,500 none Des Moines, IA 50313 2,500 none Des Moines, IA 50313 1,500 none Des Moines, IA 50313 1,500 none Des Moines, IA 50322 3,000 none Decorah, IA 52101 1,000 none Decorah, IA 52101 1,000 none Decorah, IA 52101 1,000 none	lowa	Des Moines, IA 50309	10,000	none	exempt	
Pranklin, IN 46131-2623 350 none Des Moines, IA 50309 75,000 none Des Moines, IA 50322 5,000 none Des Moines, IA 50322 5,000 none Des Moines, IA 50265-4730 7,500 none Huntington, IN 47809-1202 150 none Bloomington, IN 47809-1202 350 none Des Moines, IA 50309-2396 7,000 none Des Moines, IA 50309-2396 7,000 none Des Moines, IA 50309-2321 2,500 none Des Moines, IA 50313 2,500 none Des Moines, IA 50313 100 none Decorah, IA 50322 3,000 none Decorah, IA 50322 3,000 none Decorah, IA 50322 3,000 none Decorah, IA 50325 2,000 none	Jniversity	Fairfield, CT 06824	150	none	exempt	Education
Des Moines, IA 50309 Des Moines, IA 50309 Des Moines, IA 50322 Des Moines, IA 50322 Des Moines, IA 50265-4730 Des Moines, IA 50265-4730 Terre Haute, IN 47809-1202 Bloomington, IN 47802 Des Moines, IA 50309-2396 Des Moines, IA 50309-2321 Des Moines, IA 50314 Des Moines, IA 50314 Des Moines, IA 50314 Des Moines, IA 50313 Des Moines, IA 50313 Des Moines, IA 50313 Des Moines, IA 50313 Des Moines, IA 50325 Decorah, IA 50325 Decorah, IA 50325 Decorah, IA 50325 Decorah, IA 52101 Des Moines, IA 50325 Decorah, IA	College	Franklin, IN 46131-2623	350	попе	ехетрі	Education
Des Monnes, IA 50329  Des Monnes, IA 50322  Des Monnes, IA 50265-4730  West Des Monnes, IA 50265-4730  Huntington, IN 46750  Terre Haute, IN 47809-1202  Bloomington, IN 47402  Des Monnes, IA 50309-2396  Des Monnes, IA 50309-2321  Des Monnes, IA 50313  Manhattan, KS 66502  Des Monnes, IA 50313  Manhattan, KS 66502  Urbandale, IA 50325  Decorah, IA 50325  St Paul, MN 55105  Des Monnes, IA 50325  Decorah, IA 503	sw College Les Moines Commings Foundation	Dec Money, IA 50300	75,000	BLOU COURT	exempt	Citie • Committee
Des Monnes, IA 50222 5,000 none West Des Monnes, IA 50265-4730 7,500 none Huntington, IN 46750 100 none Huntington, IN 47809-1202 150 none Bloomington, IN 47809-1202 350 none Des Monnes, IA 50309-2396 7,000 none Des Monnes, IA 50309-2321 2,500 none Des Monnes, IA 50309-2321 2,500 none Ames, IA 50313 2,500 none Ames, IA 50313 1,500 none Application, WI 54911 100 none Des Monnes, IA 50325 2,000 none Application, WI 54911 100 none Des Monnes, IA 50325 2,000 none Application, WI 54911 1000 none Decorah, IA 50325 2,000 none St Paul, MN 55105 1000 none		Der Money IA	2,000	a loue	exembr	CIAIC & COMMINGHING
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Huntington, IN. 46750  Terre Haute, IN. 46750  Bloomington, IN. 47402  Bloomington, IN. 47402  Bloomington, IN. 47402  Des Moines, IA 50309-2396  Des Moines, IA 50304  Des Moines, IA 50309-3221  C. 500  Des Moines, IA 50313  Manhartan, KS 66502  Applicon, WI 54911  Des Moines, IA 50325  Urbandale, IA 50325  St. Paul, MN 55105  St. Paul, MN 55105  Decorah, IA 50322  St. Paul, MN 55105  Decorah, IA 50322  St. Paul, MN 55105  Decorah, IA 50325	of Central lowa	West Des Moines 1A 50265-4730	2,500		exempt	Health & Human Services
Terre Haute, IN 47809-1202 Bloomington, IN 47402 Bloomington, IN 47402 Bloomington, IN 47402 Bloomington, IN 47402 Bloomington, IN 450309-2396 Bos Moines, IA 50314 Bos Moines, IA 50319 Bos Moines, IA 50313 Bos Moines, IA 50313 Bos Moines, IA 50313 Bos Moines, IA 50325 Bos Moines, I	n University	Huntington IN 46750	100	e loud	exempt	Education
Bioomington, IN 47402 350 none Des Moines, IA 50309-2396 7,000 none Des Moines, IA 50314 2,500 none Des Moines, IA 50314 2,500 none Ames, IA 50313 5,000 none Des Moines, IA 50313 5,000 none Appleton, WI 54911 100 none Decorah, IA 50325 3,000 none Decorah, IA 50325 3,000 none St Paul, MN 55105 2,500 none	tate University	Terre Haute IN 47809-1202	150	9000	exempt	Education
Des Mones, IA 50309-2396       7,000       none         Des Mones, IA 50314       2,500       none         Des Mones, IA 50309-2321       2,500       none         Ames, IA 50014-7164       2,475       none         Des Mones, IA 50313       500       none         Manhattan, KS 66502       1,500       none         Appleton, WI 54911       100       none         Des Mones, IA 50325       3,000       none         Urbandale, IA 50322       3,000       none         St Paul, MN 55105       250       none	niversity Foundation	Bloomington, IN 47402	350	none	exempt	Education
Des Moines, IA 50314 2,500 none Des Moines, IA 50309-2321 2,500 none Ames, IA 50014-7164 2,475 none Des Moines, IA 50313 500 none Manhatian, KS 66502 1,500 none Application	ege Foundation	Des Moines, IA 50309-2396	2,000	виои	exempt	Education
Des Moines, IA 50309-2321 2,500 none Ames. IA 50014-7164 2,475 none Des Moines, IA 50313 500 none Manhatan, KS 66502 1,500 none Applictor, WI 54911 100 none Des Moines, IA 50325 2,000 none Urbandale, IA 50322 3,000 none St Paul, MN 55105 250 none	al Aid	Des Moines, 1A 50314	2,500	none	exempt	Health & Human Services
Ames, IA 50014-7164 2,475 none Des Moines, IA 50313 500 none Manhattan, KS 66502 1,500 none Application, WI 54911 100 none Des Moines, IA 50325 2,000 none Urbandale, IA 50322 3,000 none Decorah, IA 52101 1,000 none Si Paul, MN 55105 250 none	ıral Hentage Foundation	Des Moines, IA 50309-2321	2,500	none	exempt	Civic & Community
Des Moines, IA 50313 500 none Manhattan, KS 66502 1500 none Appleton, WI 54911 100 none Des Moines, IA 50325 2,000 none Urbandale, IA 5032 3,000 none Decorah, IA 52101 1,000 none St Paul, MN 55105 250 none	e University Foundation	Ames, IA 50014-7164	2,475	9000	ехетрt	Education
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Appleton, WI 54911 100 none Des Moines, IA 50325 2,000 none Urbandale, IA 50322 3,000 none Decorah, IA 52101 1,000 none Si Paul, MN 55105 250 none	tate University	Manhattan, KS 66502	1,500	none	exempt	Education
Des Moines, IA 50325 2,000 none Urbandale, IA 50322 3,000 none Decorah, IA 52101 1,000 none St Paul, MN 55105 250 none	: University	Appleton, WI 54911	100	none	exempt	Education
Urbandale, IA 50322 3,000 none Decorah, IA 52101 1,000 none St Paul, MN 55105 250 none	i & Lymphoma Society of	Des Moines, IA 50325	2,000	none	exempt	Health & Human Services
Decorah, IA 52101 1,000 none St Paul, MN 55105 250 none	tory Farms	Urbandale, IA 50322	3,000	none	exempt	Civic & Community
St Paul, MN 55105 250 none	llege	Decorah, IA 52101	1,000	none	exempt	Education
	er College	St Paul, MN 55105	250	none	exempt	Education
Urbandale, IA 50322 7,450 none		Urbandale, IA 50322	7,450	none	exempt	Health & Human Services

AmerUs Group Charitable Foundation Grants and Contributions Paud During the Year Em # 42-1431745 Form 999 FF, Part XV For Calendar Year 2009

Recipient Name and Address	Address	Amount	Relationship to Contributor	Organizational Status of Recipient	Purpose of Grant or Contribution
Mentor lowa	Des Moines, IA 50312	100	none	ехетрі	Health & Human Services
Metro Arts Alliance	Des Moines, IA 50309	3,000	none	exempt	Arts & Culture
Morningside College	Sioux City, IA 51106-1717	125	none	exempt	Education
Northern Illinois University	DeKalb, IL 60115	1,000	none	exempt	Education
Oakndge Neighborhood Services	Des Moines, IA 50314	1,000	впоп	exempt	Health & Human Services
Oglala Lakota College	Kyle, SD 57752-0490	100	попе	exempt	Education
Orchard Place Foundation	Des Moines, IA 50312	10,000	none	exempt	Health & Human Services
Peru State College	Peru, NE 68421	300	none	exempt	Education
	Des Moines, IA 50309	20,000	попе	exempt	Health & Human Services
Retired & Senior Volunteer Prog	Smithtown, NY 11787	2,000	попе	exempt	
Ronald McDonald House	Des Moines, 1A 50314	1,350	none	exempt	Health & Human Services
Rutgers University Foundation	New Brunswick, NJ 08901	750	none	exempt	Education
Saint Joseph's College	Rensselaer, IN 47978	20	none	exempt	Education
Saint Mary's College	Notre Dame, IN 46556	200	none	exempt	Education
Salisbury House	Des Moines, IA 50312	15,000	none	exempt	Civic & Community
Science Center of Iowa	Des Moines, IA 50312-2499	10,000	none	exempt	Arts & Culture
Simpson College	Indianola, IA 50125	5,000	9000	exempt	Education
Topeka Symphony	Topeka, KS 66601-2206	5,000	none	exempt	Arts & Culture
Truman State University	Kirksville, MO 63501	8	попе	exempt	Education
United Negro College Fund	Fairfax, VA 22031-8044	250	попе	exempt	Education
United Way of Central Iowa	Des Moines, IA 50314	530,303	попе	exempt	Health & Human Services
United Way of Greater Topeka	Topeka, KS 66604-4057	53,578	попе	exempt	Health & Human Services
United Way of Long Island	Deer Park, NY 11729-5780	6,436	поп	exempt	Health & Human Services
University of Anzona Foundation	Tucson, AZ 85721-0109	1,000	попе	exempt	Education
University of California Davis	Davis, CA 95616	100	none	exempt	Education
University of Indianapolis	Indianapolis, IN 46208	20	none	exempt	Education
University of Iowa	lowa City, IA 52244-4550	1,600	none	exempt	Education
University of Iowa Foundation	lowa City, IA 52244-4550	6,300	none	exempt	Education
University of Iowa-Belin Blank	lowa City, IA 52244-4550	10,000	попе	exempt	Education
University of Minnesota at Duluth	Duluth, MN 55812	20	none	ехетр	Education
University of Northern lowa	Cedar Falls, IA 50614-0282	2,774	none	exempt	Education
University of Notre Dame	Notre Dame, IN 46556	2,000	none	exempt	Education
University of San Diego	San Diego, CA 92110	200	none	exempt	Education
University of Toledo	Toledo, OH 43606-3390	1,000	none	exempt	Education
University of Wisconsin Madison	Madison, WI 53706	2,100	попе	exempt	Education
University of Wisconsin LaCrosse	La Crosse, WI 54601-3742	20	none	exempt	Education
Utah Valley State College	Orem, UT 84058	6	попе	exempt	Education
Vocal Arts Ensemble of Greater Des Moines	Urbandale, IA 50322	750	попе	exempt	Arts & Culture
Wake Forest University	Winston-Salem, NC 27106	1,100	попе	exempt	Education
Wartburg College	Waverly, IA 50677	1,000	попе	ехетрі	Education
Washburn Endowment Assoc	Topeka, KS 66621	1,200	none	exempt	Education
Washburn Womens Alliance	Topeka, KS 66621	1,500	none	exempt	Education
Wesley Retirement Services	Des Moines, IA 50312	1,000	попе	exempt	Health & Human Services
West Des Moines Community Celebration	West Des Moines, IA	25,000	none	exempt	Civic & Community
YMCA of Greater Des Moines	Des Moines, IA 50309	2,000	попе	exempt	Civic & Community
Youth Law Center	Des Moines, IA 50309	200	none	exempt	Health & Human Services
YWCA of Topeka	Topeka, KS 66612-1392	200	none	exempt	Civic & Community
Total Charitathe Containing for 2000		4 422 046			
		1,160,510			