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

2009

Note The foundation may be able to use a copy of this return to satisfy state reporting requirements.

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

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation JANE BEKINS MEGINNIS FOUNDATION		A Employer identification number 42-1475620
	Number and street (or P O box number if mail is not delivered to street address) 8 RICHARD KUNZ		B Telephone number (605) 232-6062
	Room/suite 325 DAKOTA DUNES BOULEVARD		
	City or town, state, and ZIP code DAKOTA DUNES, SD 57049		
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 479,626. (Part I, column (d) must be on cash basis)		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	
C If exemption application is pending, check here <input type="checkbox"/>			
D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>			
E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>			
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	14,648.	14,648.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<20,416.>			
	b Gross sales price for all assets on line 6a	145,981.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11	<5,768.>	14,648.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees	STMT 2	857.	0.	857.
	c Other professional fees	STMT 3	2,614.	2,614.	0.
	17 Interest				
	18 Taxes	STMT 4	72.	0.	0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses				
	24 Total operating and administrative expenses. Add lines 13 through 23		3,543.	2,614.	857.
	25 Contributions, gifts, grants paid		30,900.		30,900.
26 Total expenses and disbursements. Add lines 24 and 25		34,443.	2,614.	31,757.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	<40,211.>				
b Net investment income (if negative, enter -0-)		12,034.			
c Adjusted net income (if negative, enter -0-)			N/A		

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SECURITY NATIONAL BANK OF SOUTH DAKOTA		VARIOUS	VARIOUS
b SECURITY NATIONAL BANK OF SOUTH DAKOTA		VARIOUS	VARIOUS
c CAPITAL GAINS DIVIDENDS			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 75,522.		67,221.	8,301.
b 70,263.		99,176.	<28,913.>
c 196.			196.
d			
e			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			8,301.
b			<28,913.>
c			196.
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	<20,416.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):		3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	29,435.	487,033.	.060437
2007	27,194.	235,298.	.115573
2006	28,540.	136,518.	.209057
2005	58,074.	244,930.	.237104
2004	72,845.	303,090.	.240341

2 Total of line 1, column (d)	2	.862512
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.172502
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	425,934.
5 Multiply line 4 by line 3	5	73,474.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	120.
7 Add lines 5 and 6	7	73,594.
8 Enter qualifying distributions from Part XII, line 4	8	31,757.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	241.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	241.
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	241.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	1,060.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	1,060.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	819.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input type="checkbox"/> 819. Refunded <input type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> IA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ JANE MEGINNIS Telephone no. ▶ 435-652-1333
 Located at ▶ 2331 W. ENTRADA TR. #51, ST GEORGE, UT ZIP+4 ▶ 84770

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ▶ ☐
 and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

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

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

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

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

▶ ☐

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

X

If "Yes" to 6b, file Form 8870.

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JANE BEKINS MEGINNIS 2331 W. ENTRADA TR. #51 ST GEORGE, UT 84770	PRES.-DIRECTOR 2.00	0.	0.	0.

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

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

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

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	419,847.
b	Average of monthly cash balances	1b	12,573.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	432,420.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	432,420.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	6,486.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	425,934.
6	Minimum investment return. Enter 5% of line 5	6	21,297.

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

1	Minimum investment return from Part X, line 6	1	21,297.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	241.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	241.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	21,056.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	21,056.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	21,056.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	31,757.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	31,757.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	31,757.

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

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& RICHARD KUNZ

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

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				21,056.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	57,856.			
b From 2005	45,963.			
c From 2006	21,830.			
d From 2007	16,630.			
e From 2008	5,263.			
f Total of lines 3a through e	147,542.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 31,757.				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				21,056.
e Remaining amount distributed out of corpus	10,701.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	158,243.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	57,856.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	100,387.			
10 Analysis of line 9:				
a Excess from 2005	45,963.			
b Excess from 2006	21,830.			
c Excess from 2007	16,630.			
d Excess from 2008	5,263.			
e Excess from 2009	10,701.			

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N/A

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Part XV	Supplementary Information (continued)
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3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SEE STATEMENT 9				
Total			▶ 3a	30,900.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

Enter gross amounts unless otherwise indicated.

(See worksheet in line 13 instructions to verify calculations.)

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FORM 990-PF		DIVIDENDS AND INTEREST FROM SECURITIES		STATEMENT	1
SOURCE		GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT	
SECURITY NATIONAL BANK		14,844.	196.	14,648.	
TOTAL TO FM 990-PF, PART I, LN 4		14,844.	196.	14,648.	

FORM 990-PF		ACCOUNTING FEES		STATEMENT	2
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING		857.	0.		857.
TO FORM 990-PF, PG 1, LN 16B		857.	0.		857.

FORM 990-PF		OTHER PROFESSIONAL FEES		STATEMENT	3
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TRUST FEES		2,614.	2,614.		0.
TO FORM 990-PF, PG 1, LN 16C		2,614.	2,614.		0.

FORM 990-PF		TAXES		STATEMENT	4
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX		72.	0.		0.
TO FORM 990-PF, PG 1, LN 18		72.	0.		0.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS			STATEMENT	5
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE	
US GOVERNMENT SECURITIES	X		15,000.	15,502.	
TOTAL U.S. GOVERNMENT OBLIGATIONS			15,000.	15,502.	
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS					
TOTAL TO FORM 990-PF, PART II, LINE 10A			15,000.	15,502.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	6
DESCRIPTION	BOOK VALUE		FAIR MARKET VALUE	
AMANA GROWTH FD	13,135.		14,200.	
AMERICAN BEACON LARGE CAP VALUE FD	20,961.		21,460.	
ARTISAN INTL FUND	11,258.		11,572.	
COLUMBIA ACORN INTL FD CL Z	8,035.		6,545.	
COLUMBIA ACORN TR FD CL Z	11,611.		14,869.	
FIDELITY ADV DIVERSIFIED INTL FD #734	6,182.		7,762.	
FIDELITY ADVISOR EMERGING MKTS FD-I	6,979.		12,571.	
FIRST AMERN REAL ESTATE SECS FD-Y	4,866.		6,627.	
G S COMMODITY STRATEGY FD INSTL	8,592.		8,820.	
GOLDMAN SACHS LRG CAP VAL FD-I	13,680.		17,503.	
MERCK INC. STK.	145,490.		83,750.	
PIMCO COMMODITY REAL RETURN STRAT FD	8,592.		9,361.	
ROWE T PRICE GROWTH STK FD INC	29,580.		33,722.	
TEMPLETON FOREIGN EQUITY SERIES	21,270.		14,764.	
VANGUARD MID CAP INDEX SIGNAL FD	14,557.		21,304.	
WESTPORT FDS-CI I	6,569.		8,958.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	331,357.		293,788.	

FORM 990-PF

CORPORATE BONDS

STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
BLACKROCK HIGH YIELD BD FD	19,537.	21,399.
GEN ELEC CAP CORP 4.8%	20,176.	20,905.
GOLDMAN SACHS EMERGING MKT DBT FD-1	21,801.	22,508.
GOLDMAN SACHS GROUP 5.5% 11/15/14	20,050.	21,347.
HSBC FIN CORP 5.0%	24,453.	25,825.
HSBC FIN CORP 5.25%	24,864.	25,973.
WACHOVIA CORP GLOBAL 5.7% 8/01/13	20,430.	21,511.
TOTAL TO FORM 990-PF, PART II, LINE 10C	151,311.	159,468.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 8

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTEDJANE BEKINS MEGINNIS
2331 W. ENTRADA TRAIL #51
ST GEORGE, UT 84770TELEPHONE NUMBER

435-652-1333

FORM AND CONTENT OF APPLICATIONSINFORMATION SHOULD BE PRESENTED IN A ONE PAGE LETTER. INFORMATION SHOULD
INCLUDE AN EXPLANATION OF HOW CONTRIBUTIONS WILL BE USED AND PROOF OF TAX
EXEMPT STATUS OF ORGANIZATION REQUESTING FUNDS.ANY SUBMISSION DEADLINESTHERE ARE NO SPECIFIC TIMEFRAMES FOR SUBMISSION OF REQUESTS. REQUESTS WILL
BE CONSIDERED WHEN RECEIVED.RESTRICTIONS AND LIMITATIONS ON AWARDS

NONE UNLESS SPECIFIED AT TIME A CONTRIBUTION IS MADE.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 9

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
ARTS CENTER ASSOCIATION SIOUX CITY, IA 51101	NONE UNRESTRICTED	PUBLIC	500.
CASTLE ON THE HILL ASSOCIATION PO BOX 1776 SIOUX CITY, IA 51102	NONE UNRESTRICTED	PUBLIC	100.
CENTER FOR THE ARTS PO BOX 1819 CRESTED BUTTE, CO 81220	NONE UNRESTRICTED	PUBLIC	700.
CRESTED BUTTE LAND TRUST PO BOX 2224 CRESTED BUTTE, CO 81220	NONE UNRESTRICTED	PUBLIC	1,000.
GOODWILL INDUSTRIES 3100 W 4TH STREET SIOUX CITY, IA 51103	NONE UNRESTRICTED	PUBLIC	200.
LIVING JOURNEYS CANCER CRESTED BUTTE, CO 81220	NONE UNRESTRICTED	PUBLIC	100.
MORNINGSIDE COLLEGE 1501 MORNINGSIDE AVE SIOUX CITY, IA 51106	NONE UNRESTRICTED	PUBLIC	1,000.
ORPHANED & INJURED WILDLIFE 3012 CENTER LAKE DR SIOUX CITY, IA 51360	NONE UNRESTRICTED	PUBLIC	1,000.

JANE BEKINS MEGINNIS FOUNDATION & RICHA

42-1475620

RED CLOUD INDIAN SCHOOL 100 MISSION DR PINE RIDGE, SD 57770	NONE UNRESTRICTED	PUBLIC	200.
ROTARY CLUB OF CRESTED BUTTE CRESTED BUTTE, CO 81220	NONE UNRESTRICTED	PUBLIC	100.
SIOUX CITY MUSEUM 2900 JACKSON ST SIOUX CITY, IA 51104	NONE UNRESTRICTED	PUBLIC	200.
SIOUX CITY PUBLIC LIBRARY FOUNDATION SIOUX CITY, IA 51101	NONE UNRESTRICTED	PUBLIC	100.
COLUMBIA CENTER FOR THE ARTS HOOD RIVER, OR 97031	NONE UNRESTRICTED	PUBLIC	400.
PAWS ST GEORGE, UT 84770	NONE UNRESTRICTED	PUBLIC	100.
FISH FOOD BANK HOOD RIVER, OR 97031	NONE UNRESTRICTED	PUBLIC	200.
PAWS CRESTED BUTTE, CO 81224	NONE UNRESTRICTED	PUBLIC	25,000.

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

30,900.

2009 Tax Information Statement

Recipient's Name and Address
JANE BEKINS MEGINNIS FOUNDATION
PO BOX 3101
CRESTED BUTTE, CO 81224

☐ Corrected ☐ 2nd TIN notice

SECURITY NATIONAL BANK OF
SOUTH DAKOTA
325 DAKOTA DUNES BLVD
DAKOTA DUNES, SD 57049-5176

2009 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
Short Term Sales								
138.0710	315920686	FIDELITY ADV DIVERSIFIED INTL FD#734	12/29/2008	09/29/2009	2,025.50	1,652.71	372.79	0.00
66.6670	315805101	FIDELITY ADV EQUITY GROWTH #86	12/29/2008	09/29/2009	2,920.01	2,340.00	580.01	0.00
294.0000	315920249	FIDELITY ADVISOR EMERGING MKTS FD-I	12/29/2008	06/01/2009	4,939.20	3,445.68	1,493.52	0.00
114.0000	315920249	FIDELITY ADVISOR EMERGING MKTS FD-I	12/29/2008	09/11/2009	2,160.30	1,336.08	824.22	0.00
597.0000	318530268	FIRST AMERN REAL ESTATE SECS FD-Y	12/29/2008	06/01/2009	6,489.39	6,249.96	239.43	0.00
113.0000	318530268	FIRST AMERN REAL ESTATE SECS FD-Y	12/29/2008	09/11/2009	1,445.27	1,177.73	267.54	0.00
441.0000	38142Y773	GOLDMAN SACHS LRG CAP VAL FD-I	12/29/2008	06/01/2009	4,026.33	3,677.94	348.39	0.00
269.0000	38142Y773	GOLDMAN SACHS LRG CAP VAL FD-I	12/29/2008	09/11/2009	2,735.73	2,243.46	492.27	0.00
1643.8030	693390700	PIMCO TOTAL RETURN FUND INST	VARIOUS	09/29/2009	17,950.33	17,301.00	649.33	0.00
307.0000	922908447	VANGUARD M D CAP INDEX SIGNAL FD	12/29/2008	06/01/2009	5,845.28	4,915.07	930.21	0.00
183.0000	922908447	VANGUARD MID CAP INDEX SIGNAL FD	12/29/2008	09/11/2009	3,976.59	2,929.83	1,046.76	0.00
1670.5080	921937868	VANGUARD TOTAL BOND MKT INDEX FD-SIG	VARIOUS	09/29/2009	17,440.10	17,000.00	440.10	0.00
132.0000	961323300	WESTPORT FDS-CL I	12/29/2008	06/01/2009	2,175.36	1,873.08	302.28	0.00
76.0000	961323300	WESTPORT FDS-CL I	12/29/2008	09/11/2009	1,392.32	1,078.44	313.88	0.00
Total Short Term Sales						75,521.72 TR	67,220.98 TR	8,300.74

This is important tax information and is being furnished to you.

2009 Tax Information Statement

Page 7 of 13

Recipient's Name and Address
JANE BEKINS MEGINNIS FOUNDATION
PO BOX 3101
CRESTED BUTTE, CO 81224

☐ Corrected ☐ 2nd TIN notice

SECURITY NATIONAL BANK OF
SOUTH DAKOTA
325 DAKOTA DUNES BLVD
DAKOTA DUNES, SD 57049-5176

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks, Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
Long Term 15% Sales								
295.0000	02368A208	AMERICAN BEACON LARGE CAP VALUE FD	VARIOUS	06/31/2009	4,274.55	6,851.24	-2,576.69	0.00
234.0000	02368A208	AMERICAN BEACON LARGE CAP VALUE FD	03/06/2007	09/11/2009	3,835.25	5,522.40	-1,687.15	0.00
294.0000	197199409	COLUMBIA ACORN TR FD CL Z	VARIOUS	06/01/2009	5,856.48	8,535.20	-2,678.72	0.00
126.0000	197199409	COLUMBIA ACORN TR FD CL Z	08/15/2006	09/11/2009	2,887.92	3,577.14	-689.22	0.00
432.0000	315920686	FIDELITY ADV DIVERSIFIED INTL FD#734	VARIOUS	06/01/2009	5,650.56	9,833.89	-4,183.33	0.00
195.0000	315920686	FIDELITY ADV DIVERSIFIED INTL FD#734	VARIOUS	09/11/2009	2,854.80	4,261.63	-1,406.83	0.00
521.9290	315920686	FIDELITY ADV DIVERSIFIED INTL FD#734	01/09/2008	09/29/2009	7,656.70	11,258.03	-3,601.33	0.00
104.0000	315805101	FIDELITY ADV EQUITY GROWTH #86	VARIOUS	06/01/2009	4,114.24	5,508.79	-1,394.55	0.00
50.0000	315805101	FIDELITY ADV EQUITY GROWTH #86	03/06/2007	09/11/2009	2,164.51	2,681.50	-516.99	0.00
277.0340	315805101	FIDELITY ADV EQUITY GROWTH #86	VARIOUS	09/29/2009	12,134.09	15,517.31	-3,383.22	0.00
377.0000	741479109	ROWE T PRICE GROWTH STK FD INC	VARIOUS	06/01/2009	8,527.74	11,579.56	-3,051.82	0.00
130.0000	741479109	ROWE T PRICE GROWTH STK FD INC	03/06/2007	09/11/2009	3,225.30	4,072.90	-847.60	0.00
245.0000	880210505	TEMPLETON FOREIGN EQUITY SERIES	VARIOUS	06/01/2009	4,084.15	5,925.05	-1,840.90	0.00
156.0000	880210505	TEMPLETON FOREIGN EQUITY SERIES	VARIOUS	09/11/2009	2,996.76	4,051.80	-1,055.04	0.00
Total Long Term 15% Sales						99,176.44	-28,913.40	0.00

This is important tax information and is being furnished to you.

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

OMB No 1545-1709

▶ File a separate application for each return.

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

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

Type or print File by the due date for filing your return. See instructions.	Name of Exempt Organization JANE BEKINS MEGINNIS FOUNDATION & RICHARD KUNZ	Employer identification number 42-1475620
	Number, street, and room or suite no. If a P.O. box, see instructions 325 DAKOTA DUNES BOULEVARD	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions DAKOTA DUNES, SD 57049	

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

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

JANE MEGINNIS

- The books are in the care of ▶
- 2331 W. ENTRADA TR. #51 - ST GEORGE, UT 84770**

Telephone No ▶ **435-652-1333**

FAX No ▶

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

- 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2010**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

▶ ☒ calendar year **2009** or▶ ☐ tax year beginning _____, and ending _____.

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$ 241.
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$ 1,060.
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$ 0.

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

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

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