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

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

2009

For calendar year 2009, or tax year beginning

, 2009, and ending

, 20

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 The Margaret Blanke Grigg Foundation		A Employer identification number 43-1699657
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number (see page 10 of the instructions)
	c/o Thomas E. Venker, Jr., 911 Washington Avenue		7th Floor
	City or town, state, and ZIP code St. Louis, MO 63101		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 9,059,798		J Accounting method. <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(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 (attach schedule)				
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	23,409	23,409	N/A	
	4 Dividends and interest from securities	128,049	128,049	N/A	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	(787)			
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain			N/A	
	9 Income modifications			N/A	
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	150,671	151,458	N/A		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	24,583	24,583	N/A	24,583
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	10,358	10,358	N/A	10,358
	b Accounting fees (attach schedule)	100	100	N/A	100
	c Other professional fees (attach schedule)	61,433	61,433	N/A	61,433
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	1,445	1,445	N/A	1,445
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	29	2	N/A	2
	24 Total operating and administrative expenses. Add lines 13 through 23				
25 Contributions, gifts, grants paid	482,000			482,000	
26 Total expenses and disbursements. Add lines 24 and 25	579,948	97,921	N/A	579,921	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	(429,277)				
b Net investment income (if negative, enter -0-)		53,537			
c Adjusted net income (if negative, enter -0-)			N/A		

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash—non-interest-bearing	8,429,944	1,399,878	1,399,878		
	2 Savings and temporary cash investments					
	3 Accounts receivable ▶					
	Less: allowance for doubtful accounts ▶	1,448	1,448	1,448		
	4 Pledges receivable ▶					
	Less: allowance for doubtful accounts ▶					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)					
	7 Other notes and loans receivable (attach schedule) ▶					
	Less: allowance for doubtful accounts ▶					
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges					
	10a Investments—U.S. and state government obligations (attach schedule)					
	b Investments—corporate stock (attach schedule)	414,892	3,060,209	3,422,260		
	c Investments—corporate bonds (attach schedule)	0	3,619,593	3,686,669		
	11 Investments—land, buildings, and equipment basis ▶					
Less: accumulated depreciation (attach schedule) ▶						
12 Investments—mortgage loans						
13 Investments—other (attach schedule)	180,588	517,682	549,543			
14 Land, buildings, and equipment: basis ▶						
Less: accumulated depreciation (attach schedule) ▶						
15 Other assets (describe ▶)						
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	9,026,872	8,598,810	9,059,798			
Liabilities	17 Accounts payable and accrued expenses					
	18 Grants payable					
	19 Deferred revenue					
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable (attach schedule)					
	22 Other liabilities (describe ▶ withholding taxes)		1,211			
23 Total liabilities (add lines 17 through 22)		1,211				
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here . . . ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24 Unrestricted					
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.					
	27 Capital stock, trust principal, or current funds	9,026,872	9,026,872			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund					
	29 Retained earnings, accumulated income, endowment, or other funds					
	30 Total net assets or fund balances (see page 17 of the instructions)	9,026,872	8,597,599			
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	9,026,872	8,598,810				

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	9,026,872
2 Enter amount from Part I, line 27a	2	(429,277)
3 Other increases not included in line 2 (itemize) ▶ Rounding adjustment	3	4
4 Add lines 1, 2, and 3	4	8,597,599
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	8,597,599

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	See attached schedule			
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
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				
b				
c				
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	(547)
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8		3	515

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.

(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	589,787	1,293,834	45.58%
2007	114,207	677,773	16.85%
2006	114,263	614,629	18.59%
2005	105,997	589,439	17.98%
2004	122,358	584,503	20.93%
2	Total of line 1, column (d)		2 119.93%
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 23.99%
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5		4 8,930,483
5	Multiply line 4 by line 3		5 2,142,423
6	Enter 1% of net investment income (1% of Part I, line 27b)		6 535
7	Add lines 5 and 6		7 2,142,958
8	Enter qualifying distributions from Part XII, line 4 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 on page 18.		8 579,921

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the 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		1,071
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		1,071
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		1,071
6	Credits/Payments:			
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a		1,448
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		1,448
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		377
11	Enter the amount of line 10 to be: Credited to 2010 estimated tax 377 Refunded	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?		✓
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? <i>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.</i>		✓
c Did the foundation file Form 1120-POL for this year?		✓
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ▶ \$ _____ (2) On foundation managers. ▶ \$ _____		
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? <i>If "Yes," attach a detailed description of the activities.</i>		✓
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? <i>If "Yes," attach a conformed copy of the changes.</i>		✓
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		✓
b If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		✓
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?	✓	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	✓	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ <u>Missouri</u>		
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? <i>If "No," attach explanation</i>	✓	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? <i>If "Yes," complete Part XIV</i>		✓
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		✓

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 page 20 of the instructions)	11		✓
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	✓	
14	The books are in care of ► Charles H. Perkins Telephone no. ► 314-721-1456 Located at ► 825 S. Central Ave., Clayton, MO ZIP+4 ► 63105			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here. ► <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ► 15			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	✓
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	✓
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 ► 20____, 20____, 20____, 20____		
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 page 20 of the instructions.)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► 20____, 20____, 20____, 20____		
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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.</i>)	3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	✓
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	✓

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)? (see page 22 of the instructions) ☐ 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 page 22 of the instructions)? **5b** ☐ Yes ☒ No **N/A**

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** ☐ Yes ☒ No **✓**

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? **7b** ☐ Yes ☒ No **N/A**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).**

(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
See attached schedule				

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). 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 **►**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***3** Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 NONE	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3	

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
a	Average monthly fair market value of securities	1a	4,929,001
b	Average of monthly cash balances	1b	4,137,479
c	Fair market value of all other assets (see page 24 of the instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	9,066,480
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	9,066,480
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see page 25 of the instructions)	4	135,997
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,930,483
6	Minimum investment return. Enter 5% of line 5	6	446,524

Part XI Distributable Amount (see page 25 of the 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	446,524
2a	Tax on investment income for 2009 from Part VI, line 5	2a	1,071
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	0
c	Add lines 2a and 2b	2c	1,071
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	445,453
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	445,453
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	445,453

Part 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	579,921
b	Program-related investments—total from Part IX-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	579,921
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	579,921

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.

Part XIII Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				445,453
2 Undistributed income, if any, as of the end of 2009:				
a Enter amount for 2008 only			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	69,196			
b From 2005	76,823			
c From 2006	84,280			
d From 2007	80,472			
e From 2008	525,096			
f Total of lines 3a through e	835,867			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 579,921				
a Applied to 2008, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)	0			
d Applied to 2009 distributable amount				445,453
e Remaining amount distributed out of corpus	134,468			
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	970,335			
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 page 27 of the instructions		0		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions			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) (see page 27 of the instructions)	0			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	69,196			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	901,139			
10 Analysis of line 9:				
a Excess from 2005	76,823			
b Excess from 2006	84,280			
c Excess from 2007	80,472			
d Excess from 2008	525,096			
e Excess from 2009	134,468			

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 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 Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
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 support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see page 28 of the instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2))

None

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

None

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number of the person to whom applications should be addressed:

b The form in which applications should be submitted and information and materials they should include:

c Any submission deadlines:

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

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Form **990-PF** (2009)

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue:					
a	None					
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	23,409	
4	Dividends and interest from securities			14	128,049	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory			18	(787)	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue a					
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)				150,671	
13	Total. Add line 12, columns (b), (d), and (e)				150,671	

(See worksheet in line 13 instructions on page 28 to verify calculations.)

Part XVI-B	Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]

Form **990-PF** (2009)

The Margaret Blanke Grigg Foundation
EIN: 43-1699657
2008 Form 990-PF, Part I

Line 6a Net gain or (loss) from sale of assets not on line 10 per books

<u>Asset</u>	<u>Book-Carrying Value</u>	<u>Sale Price</u>	<u>Book Profit/Loss</u>
1 512 shs T Rowe Price Intl Gr & Inc Adv	\$19	\$18	(\$1)
1 shs AIG 2008 Securities Litigation	0	151	\$151
76 shs Citadel Broadcasting Corp	376	2	(\$374)
937 425 shs T Rowe Price Intl Gr & Inc Adv	13,404	11,427	(\$1,977)
350 shs Western Union Co	6,176	6,766	590
1 sh United Health Group Inc Securities Litig	0	307	307
Fidelity Ad Intl Discovery CI A			49
Fidelity Ad Divers Intl CI 1			131
T Rowe Price Intl Gr&Inc Adv			19
T Rowe Price Intl Gr&Inc Fd			318
			<u>318</u>
			<u>(787)</u>

Line 13 Compensation of Officers, Directors, and Trustees

Charles H Perkins	23,833
Harry Langenberg	750
	<u>\$24,583</u>

Line 16a Legal fees to The Stolar Partnership LLP

10,358

Line 16c U S Bank Investment Management Services

61,433

Line 18 Taxes

Excise Tax Based on Investment Income	\$0
Withholding Taxes	1,316
Foreign Tax	129
	<u>\$1,445</u>

Line 23 Other expenses

Fee on payment of foreign dividends	2
Basis adjustment on Peabody Energy for 2008 return of capital	27
	<u>\$29</u>

The Margaret Blanke Grigg Foundation
EIN: 43-1699657
2009 Form 990-PF, Part II

	Beginning of year (a) Book Value	End of Year (b) Book Value	(c) Fair Market Value
Line 10a - Investments-US and state government obligations	\$0	\$0	\$0
Line 10b - Investments-corporate stock			
Abbott Labs	\$11,220	\$83,820	\$97,182
American Electric Power Co	0	66,954	93,933
American Express Co	11,562	11,562	14,182
Apache Corp	0	94,773	103,170
Apple Inc	0	39,788	42,146
AT&T Inc	0	68,526	75,681
Bank of America	18,612	18,612	6,024
Chevron Corporation	0	67,110	76,990
Cisco Sys Inc	16,234	81,603	83,790
Citadel Broadcasting Corp	376	0	0
Colgate Palmolive Co	14,639	14,639	20,538
Conoco Phillips	10,521	89,014	109,801
Devon Energy Corp	8,967	8,967	7,350
Disney, Walt Co	27,250	27,250	32,250
Emerson Elec Co	0	156,327	170,400
Express Scripts Inc	0	118,264	138,272
Fpl Group Inc	0	75,892	79,230
General Mills Corp	11,370	11,370	17,703
Glaxo SmithKline PLC	22,625	22,625	17,492
Home Depot, Inc	28,334	112,784	107,041
Intel Corp	0	69,442	73,440
Interational Business Machines Corp	13,510	72,244	85,085
Johnson & Johnson	0	79,978	96,615
Kohls Corp	0	116,847	124,039
L-3 Communications Hldgs Inc	0	119,494	130,425
McDonald's Corp	12,752	83,498	131,124
Medtronic Inc	5,034	5,034	4,398
Microsoft Corporation	59,563	230,687	243,840
Nike Inc	17,010	17,010	26,428
Norfolk Southn Corp	0	94,997	104,840
Novartis	27,905	27,905	27,215
Peabody Energy	10,122	10,095	6,782
Pepsico Inc	12,885	64,911	79,040
Pfizer, Inc	12,504	62,151	61,846
Philip Morris Intl	0	120,122	144,570
Proctor & Gamble Co	11,549	11,549	12,126
Schlumberger Ltd	0	142,828	156,216
Sysco Corp	0	146,787	167,640
T J X Cos Inc	0	110,111	109,650
Union Pacific Corp	11,802	11,802	25,560
United Health Group Incorporated	11,106	11,106	6,096
United Technologies Corp	0	124,100	138,820
Valero Energy	10,159	10,159	3,183
Venzon Communications Inc	0	75,423	82,825
Wellpoint Inc	11,105	11,105	17,487
Western Union Company	6,176	0	0
X T O Energy Inc	0	60,944	69,795
Total Stock	\$414,892	\$3,060,209	\$3,422,260

Line 10c - Investments-corporate bonds

General Dynamics Corp 4 500 08/15/2010	\$0	\$259,548	\$256,453
Bhp Billiton Finance 5 000 12/15/2010	0	261,035	260,238
Ontario Providence 3 375% 05/20/2011	0	258,830	257,560
Ktw Group 3 250 10/14/2011	0	262,895	262,842
Chevron Corp 3 450 03/03/2012	0	258,420	259,830
Eli Lilly And Co 3 550 03/06/2012	0	257,635	260,173
Honeywell Intl 4 250 03/01/2013	0	259,963	262,460
Disney Walt Co 4 500 12/15/2013	0	257,355	265,563
Shell International Fin 4 000 03/21/2014	0	256,530	260,883
Bellsouth Corp 5 200 09/15/2014	0	255,668	267,748
Praxair Inc 4 625 03/30/2015	0	253,993	265,888
United Technologies Corp 4 875 05/01/2015	0	260,973	268,348
Oracle Corp Ozark Hldg Inc 5 250 1/15/16	0	258,438	269,965
Wyeth 5 500 02/15/2016	0	258,310	268,718

Total Corporate Bonds	<u>\$0</u>	<u>\$3,619,593</u>	<u>\$3,686,669</u>
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Line 13 - Investments-other

Fixed Income Funds

First American Intermediate Term Bond Fund	<u>\$107,141</u>	<u>\$107,141</u>	<u>\$112,408</u>
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Total Fixed Income Funds	<u>\$107,141</u>	<u>\$107,141</u>	<u>\$112,408</u>
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Equity Funds

Fidelity Ad Intl Discovery CI A	\$51,958	\$52,007	\$36,781
Fidelity Adv Divers Intl CI I	\$0	175,131	196,270
First American Mid Cap Growth Opp Fund	8,085	8,085	8,122
T Rowe Price International Gr & Inc Adv Fund	<u>13,404</u>	<u>175,318</u>	<u>195,962</u>

Total Funds	<u>\$73,447</u>	<u>\$410,541</u>	<u>\$437,135</u>
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Total Investments-other	<u>\$180,588</u>	<u>\$517,682</u>	<u>\$549,543</u>
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The Margaret Blanke Grigg Foundation
EIN: 43-1699657
2009 Form 990-PF, Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold	(b) How acquired	(c) Date Acquired	(d) Date Sold	(e) Gross Sales Price	(f) Depreciation	(g) Cost or other basis	(h) Gain or Loss	
							Long Term	Short Term
Capital Gain Distributions								
1 a Fidelity Ad Intl Discovery Cl A								\$49
b Fidelity Ad Divers Intl Cl 1								\$131
c T Rowe Price Intl Gr&Inc Adv								\$19
d T Rowe Price Intl Gr&Inc Fd								\$318
Sales								
e 1 512 shs T Rowe Price Intl Gr & Inc Adv	P	12/16/09	12/21/09	\$18		\$19	\$0	(\$1)
f 1 shs AIG 2008 Securities Litigation	P	11/11/31	06/24/09	151		0	\$151	
g 76 shs Citadel Broadcasting Corp	P	05/03/91	08/05/09	2		136	(\$134)	\$0
h 937 425 shs T Rowe Price Intl Gr & Inc Adv	P	Various	12/21/09	11,427		13,404	(\$1,977)	\$0
i 350 shs Western Union Co	P	04/23/03	12/21/09	6,766		6,176	\$590	\$0
j 1 sh United Health Group Inc Securities Litig	P	11/11/31	12/23/09	307		0	\$307	\$0
Total Gains (Losses) from Sales							(\$1,063)	(\$1)
Total Gains (Losses)							(\$1,063)	\$516
2 Capital gain net income or (net capital loss)								(\$547)
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)								\$515
Total Sales Price				\$18,671				

The Margaret Blanke Grigg Foundation
EIN: 43-1699657
2008 Form 990-PF, Part VIII

Information About Officers, Directors, Trustees, Etc

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

(a) <u>Name and Address</u>	(b) <u>Title and average hours per week devoted to position</u>	(c) <u>Compensation</u>	(d) <u>Contributions to employee benefit plans and deferred compensation</u>	(e) <u>Expense account other allowances</u>
William H Hobson 911 Washington Ave 7th Floor St. Louis, MO 63101	President Member Board of Directors 60-80 hours per year	\$0	\$0	\$0
Charles R Grigg P O Box 807 Haverhill, MA 01831	Vice-President Member Board of Directors 15-20 hours per year	\$0	\$0	\$0
Kaatri Grigg 2500 Steiner St , Apt 4 San Francisco, CA 94115	Vice-President (from 12/15/09 on) Member Board of Directors (from 9/30/09 on) 5 hours per year			
Harry H Langenberg II 7777 Bonhomme Suite 2400 Clayton, MO 63105	Vice-President Member Board of Directors 15-20 hours per year	\$750	\$0	\$0
Charles H Perkins 825 S Central Ave Clayton, MO 63105	Treasurer Member Board of Directors 40-60 hours per month	\$23,833	\$0	\$0
Thomas E Venker, Jr 911 Washington Ave 7th Floor St Louis, MO 63101	Secretary Member Board of Directors (through 9/30/09) 60-80 hours per year	\$0	\$0	\$0

The Margaret Blanke Grigg Foundation
E.I.N. 43-1699657
2009 Form 990-PF, Part X
Average Month End Asset Values, Lines 1a and 1b

	Cash Balance	Est Tax Payment	Adjusted Cash Balance	Total Account	Est Tax Payment	Adjusted Total Account	Market Value of Securities
January	\$8,432,086	\$1,448	\$8,433,534	8,896,437	\$1,448	\$8,897,885	\$464,351
February	8,434,254	1,448	8,435,702	8,854,391	1,448	8,855,839	420,137
March	7,651,745	1,448	7,653,193	8,870,648	1,448	8,872,096	1,218,903
April	4,264,283	1,448	4,265,731	8,858,180	1,448	8,859,628	4,593,897
May	4,010,851	1,448	4,012,299	8,954,094	1,448	8,955,542	4,943,243
June	4,015,671	1,448	4,017,119	8,989,739	1,448	8,991,187	4,974,068
July	2,897,865	1,448	2,899,313	9,082,564	1,448	9,084,012	6,184,699
August	2,905,866	1,448	2,907,314	9,168,169	1,448	9,169,617	6,262,303
September	1,873,923	1,448	1,875,371	9,271,812	1,448	9,273,260	7,397,889
October	1,869,477	1,448	1,870,925	9,279,984	1,448	9,281,432	7,410,507
November	1,876,472	1,448	1,877,920	9,496,018	1,448	9,497,466	7,619,546
December	1,399,878	1,448	1,401,326	9,058,342	1,448	9,059,790	7,658,464
Total	\$49,632,371	\$17,376	\$49,649,747	\$108,780,378	\$17,376	\$108,797,754	\$59,148,007
Months	12	12	12	12	12	12	12
Ave Monthly Bal	\$4,136,031	\$1,448	\$4,137,479	\$9,065,032	\$1,448	\$9,066,480	\$4,929,001

The Margaret Blanke Grigg Foundation
EIN: 43-1699657
2009 Form 990-PF, Part XV, Line 3a
Contributions

Page 1 of 2

<u>Name and Address</u>	<u>Purpose</u>	<u>Amount</u>
Artist Guild of St Louis 2 Oak Knoll Park St Louis, MO 63105	Operational Support	\$1,500
Bethesda Health Home Foundation 1630 Des Peres Road, Suite 290 St Louis, MO 63131	Operational Support	15,000
Community Music School of Webster 470 East Lockwood Avenue St Louis, MO 63119	Operational Support	2,500
Eugene Field House 634 South Broadway St Louis, MO 63102	Operational Support	2,500
Forest Park Forever 5595 Grand Drive St Louis, MO 63112	Operational Support	1,500
Foundation Fighting Blindness P O Box 16646 St Louis, MO 63105	Operational Support	15,000
Grand Center 634 North Grand, Suite 10A St Louis, MO 63103	Operational Support	5,000
Missouri Botanical Garden P O Box 299 St Louis, MO 63166	Operational Support	50,000
Missouri Historical Society P O Box 11940 St Louis, MO 63112	Operational Support	50,000
Oasis Institute 7710 Carondelet Ave , Suite 125 St Louis, MO 63105	Operational Support	1,500
Opera Theatre of St Louis P O Box 191910 Webster Groves, MO 63119	Operational Support	50,000

The Margaret Blanke Grigg Foundation
EIN: 43-1699657
2008 Form 990-PF, Part XV, Line 3a
Contributions

Page 2 of 2

Sheldon Art Foundation 3658 Washington Blvd St Louis, MO 63108	Operational Support	10,000
St Andrews Society for Seniors 6633 Delmar Blvd St Louis, MO 63130	Operational Support	10,000
St Louis Art Museum 1 Fine Arts Drive St Louis, MO 63110	Operational Support	50,000
St Louis Science Center 5050 Oakland St. Louis, MO 63110	Operational Support	50,000
St Louis Symphony Foundation 718 North Grand Avenue St Louis, MO 63103	Operational support	50,000
St Louis Symphony Foundation 718 North Grand Avenue St Louis, MO 63103	Ford Challenge Pledge	100,000
Shakespeare Festival of St. Louis 14 South Euclid St Louis, MO 63108	Operational Support	2,500
Washington University 1 Brookings Drive St Louis, MO 63130	Operational Support	15,000
Total Contributions		<u><u>\$482,000</u></u>

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

COPY
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 The Margaret Blanke Grigg Foundation	Employer identification number 43 1699657	
	Number, street, and room or suite no. If a P.O. box, see instructions c/o Thomas E. Venker, Jr., 911 Washington Avenue, 7th Floor		
	City, town or post office, state, and ZIP code. For a foreign address, see instructions St. Louis, MO 63101		

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 |

- The books are in the care of ► **Charles H. Perkins**

Telephone No. ► (**314**) **721-1456** FAX No. ► ()

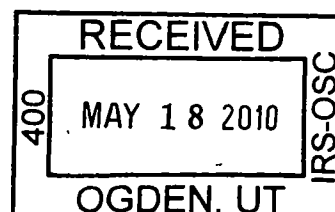
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If this is for the whole group, check this box ☐ . If it is for part of the group, check this box ☐ 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**, 20**10**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☒ calendar year 20**09** or
 - ☐ tax year beginning, 20, and ending, 20

- 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	\$	1,071
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	\$	1,448
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	\$	(377)

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.



ENVELOPE
POSTMARK DATE MAY 14 2010

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☐ **Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868
- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1)

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed)

Type or print File by the extended due date for filing the return. See instructions.	Name of Exempt Organization	Employer identification number
	Number, street, and room or suite no. If a P.O. box, see instructions	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	

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

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

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

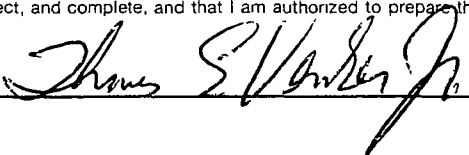
- The books are in the care of _____
Telephone No. (_____) _____ FAX No. (_____) _____
- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____. If 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 is for.
- 4 I request an additional 3-month extension of time until _____, 20____.
- 5 For calendar year _____, or other tax year beginning _____, 20____, and ending _____, 20____.
- 6 If this tax year is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period
- 7 State in detail why you need the extension _____

8a 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.	8a \$
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b \$
c Balance Due. Subtract line 8b from line 8a. 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.	8c \$

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ▶


Title ▶ **Attorney**Date ▶ **5/14/10**