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Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

2009

Department of the Treasury
Internal Revenue Service

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

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

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation FORSTER-POWERS CHARITABLE TRUST		A Employer identification number 43-6110478
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite 4635 WYANDOTTE 206		B Telephone number 816-753-7777
	City or town, state, and ZIP code KANSAS CITY, MO 64112-1537		C If exemption application is pending, check here ☐
	H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 6825278.		J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received			N/A	
2	Check ☒ If the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	137.	137.		STATEMENT 1
4	Dividends and interest from securities	111189.	111189.		STATEMENT 2
5a	Gross rents	234711.	234711.		STATEMENT 3
b	Net rental income or (loss)	136534.			STATEMENT 4
6a	Net gain or (loss) from sale of assets not on line 10	43119.			
b	Gross sales price for all assets on line 6a	839468.			
7	Capital gain net income (from Part IV, line 2)		43119.		
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	389156.	389156.		
13	Compensation of officers, directors, trustees, etc	0.	0.		0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees STMT 5	7589.	7589.		0.
b	Accounting fees STMT 6	6800.	6800.		0.
c	Other professional fees				
17	Interest				
18	Taxes STMT 7	33066.	16606.		0.
19	Depreciation and depletion	37288.	37288.		
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses STMT 8	37526.	37080.		0.
24	Total operating and administrative expenses. Add lines 13 through 23	122269.	105363.		0.
25	Contributions, gifts, grants paid	448000.			448000.
26	Total expenses and disbursements. Add lines 24 and 25	570269.	105363.		448000.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	-181113.			
b	Net investment income (if negative, enter -0-)		283793.		
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		
		Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	663835.	356996.	356996.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	32359.	25832.	25832.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 10	4832993.	4976278.	4852450.
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment basis ▶ 1559825.			
	Less accumulated depreciation STMT 9 ▶ 325866.	1250395.	1233959.	1590000.
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	6779582.	6593065.	6825278.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ STATEMENT 11)	13591.	8187.	
23 Total liabilities (add lines 17 through 22)	13591.	8187.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐			
	24 Unrestricted and complete lines 24 through 26 and lines 30 and 31.			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	27 Capital stock, trust principal, or current funds	3145408.	3145408.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
29 Retained earnings, accumulated income, endowment, or other funds	3620583.	3439470.		
30 Total net assets or fund balances	6765991.	6584878.		
31 Total liabilities and net assets/fund balances	6779582.	6593065.		

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	6765991.
2 Enter amount from Part I, line 27a	2	-181113.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	6584878.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	6584878.

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 VISA INC CL A	P	07/02/08	12/15/09
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 839468.		796349.	43119.
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			43119.
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** **43119.**

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):
If gain, also enter in Part I, line 8, column (c).
If (loss), enter -0- in Part I, line 8 **3** **N/A**

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	433740.	8994478.	.048223
2007	451654.	10191576.	.044316
2006	433708.	9248359.	.046896
2005	414473.	9152099.	.045287
2004	427959.	8759675.	.048856

2 Total of line 1, column (d)	2	.233578
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	.046716
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	4917533.
5 Multiply line 4 by line 3	5	229727.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2838.
7 Add lines 5 and 6	7	232565.
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.	8	448000.

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 ☐ 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 ☒ and enter 1% of Part I, line 27b		1	2838.
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	2838.
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	2838.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	3600.	
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	3600.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ 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	762.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax	11	762.	Refunded

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
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. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 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) MO		
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

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 ► **DOES NOT HAVE A WEBSITE**

14 The books are in care of ► **ROBERT E TURGEON** Telephone no. ► **816-753-7777**
 Located at ► **4635 WYANDOTTE, SUITE 206, KANSAS CITY, MO** ZIP+4 ► **64112**

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?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ 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)?	☐ Yes ☒ 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.)	☐ Yes ☒ 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	N/A	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?	☐ Yes ☒ No	
If "Yes," list the years ► _____ , _____ , _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____ , _____ , _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b X

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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)?

Organizations relying on a current notice regarding disaster assistance check here

N/A

5b

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?

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

6b

X

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
ROBERT E TURGEON	TRUSTEE			
4635 WYANDOTTE, SUITE 206				
KANSAS CITY, MO 64112	0.00	0.	0.	0.
ARNOLD W MEARS	TRUSTEE			
205 W 125TH ST				
KANSAS CITY, MO 64145	0.00	0.	0.	0.
ROBERT T SCHWEIGER	TRUSTEE			
1204 W 71ST TERR				
KANSAS CITY, MO 64114	0.00	0.	0.	0.
GERALD MEINERS	TRUSTEE			
530 W 123RD				
KANSAS CITY, MO 64145	0.00	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 VIII**Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

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

0

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 FOUNDATION ONLY MAKES CONTRIBUTIONS TO OTHER 501(C)(3) ORGANIZATIONS. SEE LISTING FOR PART XV.	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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

	Amount
1 NONE	0.
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	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	4840402.
b	Average of monthly cash balances	1b	152017.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	4992419.
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	4992419.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	74886.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4917533.
6	Minimum investment return. Enter 5% of line 5	6	245877.

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	245877.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	2838.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2838.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	243039.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	243039.
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	243039.

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	448000.
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	448000.
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	2838.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	445162.

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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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				243039.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			220222.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 448000.				
a Applied to 2008, but not more than line 2a			220222.	
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				227778.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
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				15261.
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	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

Part XIV	Private Operating Foundations (see instructions and Part VII-A, question 9)
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N/A

- 1 a** 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(I)(3) or ☐ 4942(I)(5)

- 2 a** 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.

- 3** Subtract line 2d from line 2c
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(i)(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 the instructions.)
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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 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:

ROBERT E TURGEON, 816-753-777
4635 WYANDOTTE, SUITE 206, KANSAS CITY, MO 64112

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

NO SPECIFIC REOUIREMENTS

- c Any submission deadlines:**

NONE

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

MUST BE A 501(C)(3) ENTITY

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

SOURCE	AMOUNT
UMB	137.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	137.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
CHARLES SCHWAB	111189.	0.	111189.
TOTAL TO FM 990-PF, PART I, LN 4	111189.	0.	111189.

FORM 990-PF RENTAL INCOME STATEMENT 3

KIND AND LOCATION OF PROPERTY	ACTIVITY NUMBER	GROSS RENTAL INCOME
NON RESIDENTIAL RENTAL, KCMO	1	234711.
TOTAL TO FORM 990-PF, PART I, LINE 5A		234711.

FORM 990-PF RENTAL EXPENSES STATEMENT 4

DESCRIPTION	ACTIVITY NUMBER	AMOUNT	TOTAL
RENT EXPENSE (LEASEHOLD INTEREST)		8621.	
INSURANCE		7129.	
REPAIRS AND MAINTENANCE		10101.	
REAL ESTATE TAXES		16606.	
LEGAL FEES		7589.	
UTILITIES		1822.	
AMORTIZATION OF LEASEHOLD INTEREST		2494.	
DEPRECIATION - 3107 ROANOKE		20751.	
DEPRECIATION - 2 EAST GREGORY		16537.	
LEASE COMMISSION AMORTIZATION		6527.	

- SUBTOTAL - 1

98177.

TOTAL RENTAL EXPENSES

98177.

NET RENTAL INCOME TO FORM 990-PF, PART I, LINE 5B

136534.

FORM 990-PF LEGAL FEES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	7589.	7589.		0.
TO FM 990-PF, PG 1, LN 16A	7589.	7589.		0.

FORM 990-PF ACCOUNTING FEES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
JOHN E YOUNG	3800.	3800.		0.
PAMELA WISE	3000.	3000.		0.
TO FORM 990-PF, PG 1, LN 16B	6800.	6800.		0.

FORM 990-PF TAXES STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAXES	16460.	0.		0.
REAL ESTATE TAXES	16606.	16606.		0.
TO FORM 990-PF, PG 1, LN 18	33066.	16606.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
PENALTY - EXCISE TAXES	446.	0.		0.	
OFFICE SUPPLIES	386.	386.		0.	
RENT EXPENSE (LEASEHOLD INTEREST)	8621.	8621.		0.	
INSURANCE	7129.	7129.		0.	
REPAIRS AND MAINTENANCE	10101.	10101.		0.	
UTILITIES	1822.	1822.		0.	
AMORTIZATION	9021.	9021.		0.	
TO FORM 990-PF, PG 1, LN 23	37526.	37080.		0.	

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT			STATEMENT	9
DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE	FAIR MARKET VALUE	
LEASEHOLD - 103RD & WORNALL, KCMO	146967.	59887.	87080.	410000.	
LAND - 3107 ROANOKE, KCMO	105000.	0.	105000.	97080.	
BUILDING - 3107 ROANOKE, KCMO	643881.	155088.	488793.	577920.	
LAND - 2 EAST GREGORY, KCMO	100000.	0.	100000.	76580.	
BUILDING - 2 EAST GREGORY, KCMO	563977.	110891.	453086.	428420.	
TO 990-PF, PART II, LN 14	1559825.	325866.	1233959.	1590000.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	10
DESCRIPTION	BOOK VALUE		FAIR MARKET VALUE	
INVESTMENTS	4976278.		4852450.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	4976278.		4852450.	

FORM 990-PF	OTHER LIABILITIES	STATEMENT	11
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
TENANT SECURITY DEPOSITS	13591.	8187.
TOTAL TO FORM 990-PF, PART II, LINE 22	13591.	8187.

FORM 990-PF	GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR	STATEMENT	12
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RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
AVILA UNIVERSITY 11901 WORNALL ROAD KANSAS CITY, MO 64145	UNRESTRICTED	PUBLIC	2000.
AVILA UNIVERSITY 11901 WORNALL ROAD KANSAS CITY, MO 64145	SCHOLARSHIP	PUBLIC	100000.
BENILDE HALL 3220 EAST 23RD ST KANSAS CITY, MO 64127	UNRESTRICTED	PUBLIC	5000.
BISHOP MIEGE CATHOLIC HIGH SCHOOL 5041 REINHARDT DR SHAWNEE MISSION, KS 66205	SCHOLARSHIP	PUBLIC	50000.
BOY SCOUTS OF AMERICA 10210 HOLMES RD KANSAS CITY, MO 64131	UNRESTRICTED	PUBLIC	5000.
CHILDREN'S CENTER FOR VISUALLY IMPAIRED 3101 MAIN STREET KANSAS CITY, MO 64111	UNRESTRICTED	PUBLIC	2500.

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43-6110478

CONCEPTION SEMINARY COLLEGE PO BOX 502 CONCEPTION , MO 64433	UNRESTRICTED	PUBLIC	10000.
CRISTO REY SCHOOL 211 W LINWOOD BLVD KANSAS CITY, MO 64111	UNRESTRICTED	PUBLIC	10000.
DE PAUW UNIVERSITY PO BOX 37 GREENCASTLE , IN 46135	SCHOLARSHIP	PUBLIC	5000.
FERTILITY CARE CENTER 1312 NW FAIRWAY CIRCLE BLUE SPRINGS, MO 64014	UNRESTRICTED	PUBLIC	10000.
FOUNDATION FOR INCLUSIVE RELIGIOUS EDUCATION 3659 HARRISON BLVD KANSAS CITY, MO 64109	UNRESTRICTED	PUBLIC	10000.
HOLY NAME CATHOLIC SCHOOL 1007 SOUTHWEST BLVD KANSAS CITY, KS 66103	UNRESTRICTED	PUBLIC	10000.
IMMACOLATA MANOR 2101 HUGHES ROAD LIBERTY, MO 64068	UNRESTRICTED	PUBLIC	2000.
LAKEMARY CENTER 100 LAKEMARY DR, BOX 449 PAOLA, KS 66071	UNRESTRICTED	PUBLIC	1000.
LALMBA ASSOCIATION 7685 QUARTZ STREET ARVADA, CO 80007	UNRESTRICTED	PUBLIC	4000.
OUR LADY'S MONTESSORI SCHOOL 3020 S 7TH STREET KANSAS CITY, KS 66103	UNRESTRICTED	PUBLIC	10000.

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ROTARY CLUB YOUTH CAMP 22310 E COLBERN ROAD LEE'S SUMMIT, MO 64063	UNRESTRICTED	PUBLIC	5000.
SERRA CLUB 118 W 119TH ST KANSAS CITY, MO 64145	UNRESTRICTED	PUBLIC	5000.
SETON CENTER 2816 EAST 23RD ST KANSAS CITY, MO 64127	UNRESTRICTED	PUBLIC	5000.
SISTERS OF ST. FRANCIS 2100 N NOLAND ROAD INDEPENDENCE, MO 64050	UNRESTRICTED	PUBLIC	2500.
SISTERS OF ST. JOSEPH OF CARONDELET 5101 COLLEGE BLVD, SUITE 220 LEAWOOD, KS 66211	UNRESTRICTED	PUBLIC	5000.
ST. STEPHEN'S INDIAN MISSION WIND RIVER RESERVATION, BOX 278 ST STEPHENS, WY 82524	UNRESTRICTED	PUBLIC	1000.
ST. TERESA'S ACADEMY 5600 MAIN STREET KANSAS CITY, MO 64113	UNRESTRICTED	PUBLIC	100000.
ST. VINCENT DEPAUL SOCIETY OF ST. FRANCIS XAVIER CHURCH 1001 E 52ND ST KANSAS CITY, MO 64110	UNRESTRICTED	PUBLIC	3000.
VISITATION PARISH 5141 MAIN STREET KANSAS CITY, MO 64112	UNRESTRICTED	PUBLIC	5000.
VITAE SOCIETY 1731 STE D S RIDGE DR JEFFERSON CITY, MO 65109	UNRESTRICTED	PUBLIC	25000.

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BISHOP WARD HIGH SCHOOL
708 N 18TH STREET KANSAS CITY, SCHOLARSHIP
KS 66102

PUBLIC 50000.

RED CLOUD INDIAN SCHOOL
100 MISSION DRIVE PINE RIDGE , UNRESTRICTED
SD 57770

PUBLIC 5000.

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

448000.