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

OMB No 1545-0052

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

, 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

Allen Birge Charitable Trust

Number and street (or P O box number if mail is not delivered to street address)

2243 Centeroyal Drive

City or town, state, and ZIP code

Saint Louis, MO 63131

A Employer identification number

43-6647224

B Telephone number (see page 10 of the instructions)

214-260-1721

C If exemption application is pending, check here

D 1. Foreign organizations, check here

2. Foreign organizations meeting the 85% test,  
check here and attach computationE If private foundation status was terminated  
under section 507(b)(1)(A), check hereF If the foundation is in a 60-month termination  
under section 507(b)(1)(B), 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

I Fair market value of all assets at

end of year (from Part II, col (c),

line 16) ▶ \$

667,567

J Accounting method

☒ Cash

Accrual

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)

1 Contributions, gifts, grants, etc., received (attach schedule)

2 Check ☒ if the foundation is not required to attach Sch B

3 Interest on savings and temporary cash investments

15

15

4 Dividends and interest from securities

22,306

22,306

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10 - STM139

(837)

b Gross sales price for all assets on line 6a

2,904

7 Capital gain net income (from Part IV, line 2)

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) (attach schedule)

11 Other income (attach schedule)

12 Total. Add lines 1 through 11

21,484

22,321

13 Compensation of officers, directors, trustees, etc

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule) - STM108

b Accounting fees (attach schedule)

1,295

1,295

c Other professional fees (attach schedule)

17 Interest - STM110

18 Taxes (attach schedule) (see page 14 of the instructions)

1,819

1,718

19 Depreciation (attach schedule) and depletion

20 Occupancy

21 Travel, conferences, and meetings

412

412

22 Printing and publications - STM103

23 Other expenses (attach schedule)

125

125

24 Total operating and administrative expenses.

Add lines 13 through 23

3,651

1,843

1,707

25 Contributions, gifts, grants paid

21,800

21,800

26 Total expenses and disbursements. Add lines 24 and 25

25,451

1,843

23,507

27 Subtract line 26 from line 12

a Excess of revenue over expenses and disbursements

(3,967)

b Net investment income (if negative, enter -0-)

20,478

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

0

P23

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	2,993	2,768	2,768		
	2	Savings and temporary cash investments					
	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 (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)					
	c	Investments - corporate bonds (attach schedule)					
	Liabilities	11	Investments - land, buildings and equipment basis				
		Less accumulated depreciation (attach schedule)					
12		Investments - mortgage loans					
13		Investments - other (attach schedule)	142,161	138,421	664,799		
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)	145,154	141,189	667,567		
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 (attach schedule)					
	22	Other liabilities (describe)					
	23	Total liabilities (add lines 17 through 22)		0			
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted	145,154	141,189			
	25	Temporarily restricted					
	26	Permanently restricted					
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.					
27	Capital stock, trust principal, or current funds						
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)	145,154	141,189				
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	145,154	141,189				

## 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	145,154
2	Enter amount from Part I, line 27a	2	(3,967)
3	Other increases not included in line 2 (itemize)	3	2
4	Add lines 1, 2, and 3	4	141,189
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	141,189

**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 (yr., mo., day)	(d) Date sold (yr., mo., day)
<b>1a</b> Agilent Technologies Stock 100shs	P	1997-09-26	2009-12-15
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)
<b>a</b> 2,904		3,741	(837)
b			
c			
d			
e			

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

(i) FMV 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))
<b>a</b>			(837)
b			
c			
d			
e			

<b>2</b> 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	(837)
<b>3</b> 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	

**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 page 18 of the 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	41,724	843,917	0.049441
2007	51,750	1,004,065	0.05154
2006	49,620	942,585	0.052642
2005	51,068	899,604	0.056767
2004	36,898	857,881	0.043011

<b>2</b> Total of line 1, column (d) . . . . .	2	0.253402
<b>3</b> 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	0.05068
<b>4</b> Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 . . . . .	4	676,210
<b>5</b> Multiply line 4 by line 3 . . . . .	5	34,270
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b) . . . . .	6	205
<b>7</b> Add lines 5 and 6 . . . . .	7	34,475
<b>8</b> 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	23,507

**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	410
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	410
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	410
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009 . . . . .	6a	600	
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	600	
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	190	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax <input type="checkbox"/> 190 Refunded <input type="checkbox"/>	11		

**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 page 19 of the instructions for definition)? . . . . . If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials 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"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
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 page 19 of the instructions) <input type="checkbox"/> 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 on page 27)? 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

**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		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 ▶ William Steinhart CPA	Telephone no	▶ 314-260-1721	
	Located at ▶ 2243 Centeroyal Drive Saint Louis, MO	ZIP+4	▶ 63131	
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	▶	

**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 X No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes X No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes X 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 X 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 X 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)?	1b	
Organizations relying on a current notice regarding disaster assistance check here ▶		
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 X 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 page 20 of the instructions)	2b	X
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 X 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)	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

**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

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? . . . . . 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 ☒

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

**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
Dr Clifford A Birge 12 Ridgetop Saint Louis, MO 63117	Trustee 1	0	0	0
Dr Stanley J Birge 7130 Westmoreland, MO 63130	Trustee 0	0	0	0
Elizabeth Curren 2045 Fearn Los Osos, CA 93402	Trustee 0	0	0	412
Nanacy J Birge 18 Fair Oaks Saint Louis, MO 63124	Trustee 0	0	0	0

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	
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	
2	
All other program-related investments. See page 24 of the instructions	
3	
Total. Add lines 1 through 3 . . . . .	▶

EEA

Form 990-PF (2009)



**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	674,223
b	Average of monthly cash balances	1b	12,285
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	686,508
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	0
3	Subtract line 2 from line 1d	3	686,508
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	10,298
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	676,210
6	Minimum investment return. Enter 5% of line 5	6	33,811

**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	33,811
2a	Tax on investment income for 2009 from Part VI, line 5	2a	410
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	410
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	33,401
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	33,401
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	33,401

**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	23,507
b	Program-related investments - total from Part IX-B	1b	
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	23,507
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	23,507

**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				33,401
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only				
b Total for prior years				
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005	1,880			
c From 2006	3,399			
d From 2007	2,593			
e From 2008	109			
f Total of lines 3a through e	7,981			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 23,507				
a Applied to 2008, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)				
d Applied to 2009 distributable amount				23,507
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	7,981			7,981
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
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				
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions				
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions				
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				1,913
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)				
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a				
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 page 27 of the instructions and Part VII-A, question 9)

<b>1a</b>	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>b</b>	Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)				
<b>2a</b>	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .	Tax year	Prior 3 years		(e) Total
		(a) 2009	(b) 2008	(c) 2007	(d) 2006
<b>b</b>	85% of line 2a . . . . .				
<b>c</b>	Qualifying distributions from Part XII, line 4 for each year listed . . . . .				
<b>d</b>	Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .				
<b>e</b>	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .				
<b>3</b>	Complete 3a, b, or c for the alternative test relied upon				
<b>a</b>	"Assets" alternative test - enter				
	(1) Value of all assets . . . . .				
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .				
<b>b</b>	"Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed . . . . .				
<b>c</b>	"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) )
- 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

**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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
Barnes Jewish Hospital Found 1001 Highlands Plaza Drive Saint Louis MO 63110	none	Exempt	Medical research	4,500
Ladue Chapel Presbyterian Chur 9450 Clayton Road Saint Louis MO 63124	none	exempt	Religious	1,000
Newark Junior High School 6201 Lafayette Avenue Newark CA 94560	none	exempt	Education	900
St Louis Symphony 718 North Grand Boulevard Saint Louis MO 63103	none	exempt	Education	3,000
san Luis Obispo Literacy Counc 1264 Higuerra Avenue San Luis Obispo CA 93401	none	exempt	Education	250
Trinity United Methodost Schol 490 Los Osos Valley Road Los Osos CA 93402	none	exempt	Education	3,000
Washington University St Louis 1 Brookings Drive Saint Louis MO 63130	none	Exempt	Education	1,000
Beautification Commission Elks 315 Bridge Street Elk Rapids MI 49629-0398	none	Exempt	Land Preservation	600
<b>Total</b>			<b>3a</b>	
<b>b Approved for future payment</b>				
<b>Total</b>			<b>3b</b>	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
Mount Holyoke College 50 College Street South Hadley MA 01075-1485	none	Exempt	Education	1,300
Pilgrim Congregational Church 826 Union Boulevard Saint Louis MO 63108	none	Exempt	Religious	400
Saint Luke's Hospital 232 Woods Mill Road Chesterfield MO 63017	none	Exempt	Medical Research	1,000
Trinity United Methodist Church 790 Los Osos Valley Road Los Osos CA 93402	none	Exempt	Religious	2,250
Whitney Harris World Ecology Cn 1 University Drive Saint Louis MO 63121	none	Exempt	Educational	2,600
<b>Total</b>			<b>3a</b>	<b>21,800</b>
<b>b Approved for future payment</b>				
<b>Total</b>			<b>3b</b>	

**Part XVI-A Analysis of Income-Producing Activities**

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					
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	15	
4 Dividends and interest from securities . . . . .			14	22,306	
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 .					
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) . . . . .				22,321	
13 Total. Add line 12, columns (b), (d), and (e) . . . . .			13		22,321

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

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

Line No.



Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 29 of the instructions )



**Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

- | 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?   |  | Yes | No |
|---|--|-----|----|
| a Transfers from the reporting foundation to a noncharitable exempt organization of   |  |     |    |
| (1) Cash  |  |     | X  |
| (2) Other assets  |  |     | X  |
| b Other transactions  |  |     |    |
| (1) Sales of assets to a noncharitable exempt organization  |  |     | X  |
| (2) Purchases of assets from a noncharitable exempt organization  |  |     | X  |
| (3) Rental of facilities, equipment, or other assets  |  |     | X  |
| (4) Reimbursement arrangements  |  |     | X  |
| (5) Loans or loan guarantees  |  |     | X  |
| (6) Performance of services or membership or fundraising solicitations  |  |     | X  |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees  |  |     | X  |
| d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received |  |     |    |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? . . . . . ☐ Yes ☒ No
- b** If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

S i g n  H e r e	Under penalties of perjury, I declare that I have examined this return including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.			
	 Signature of officer or trustee		5/14/10 Date	TRUSTEE Title
Paid Prepar- er's Use Only	Preparer's signature 		Date 05-11-2010	Check if self-employed <input checked="" type="checkbox"/> X Preparer's identifying number (see <b>Signature</b> on page 30 of the instructions) P00038143
	Firm's name (or yours if self-employed), address, and ZIP code William Steinhart, CPA LLC Saint Louis, MO 63131		EIN 314-260-1721	Phone no 314-260-1721

# Federal Supporting Statements

2009 PG 01

Name(s) as shown on return

FEIN

Allen Birge Charitable Trust

43-6647224

## Form 990PF, Part III, Line 3 Other Increases Schedule

Statement #115

Rounding	2
Total	2

## Form 990PF, Part II, Line 13 Investments: Other Schedule

PG 01  
Statement #118

Category	Book value (BOY)	Book value (EOY)	FMV (EOY)
Marketable Securities	142,161	138,421	664,799
Total	142,161	138,421	664,799

Agilent Technologies  
1997-09  
Purchase  
2009-12

\$2,904  
\$  
\$  
\$  
\$3,741



# Federal Supporting Statements

2009 PG 01

Your Social Security Number

43-6647224

Name(s) as shown on return  
Allen Birge Charitable Trust

Form 990PF, Part I, Line 23 - Other Expenses Schedule Statement #103

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
CMA Fee	125	125	0	0
Totals	125	125	0	0

PG 01

Statement #108

Form 990PF, Part I, Line 16(b) - Accounting Fees Schedule

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
Accounting	1,295	0	0	1,295
Totals	1,295	0	0	1,295

# Federal Supporting Statements

2009 PG 01

Name(s) as shown on return

Allen Birge Charitable Trust

Your Social Security Number

43-6647224

Form 990PF, Part I, Line 18 - Taxes Schedule

Statement #110

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
Foreign Taxes	1,718	1,718	0	0
Federal Excise Tax	101	0	0	0
Totals	1,819	1,718	0	0

ALLEN-BIRGE CHARITABLE TRUST

Account Number: 683-15G95

24-Hour Assistance: (800) MERRILL  
Access Code: 91-683-15495

## YOUR CMA FOR TRUST BANK DEPOSIT INTEREST SUMMARY

December 01, 2009 December 31, 2009

Money Account Description	Opening Balance	Average Deposit Balance	Current Yield%	Interest on Deposits	Closing Balance
FIA Card Services, N.A.	18,356	21,440	10	173	24,567
<b>TOTAL ML Bank Deposit Program</b>	18,356			173	24,567

## YOUR CMA FOR TRUST ASSETS

CASH/MONEY ACCOUNTS	Quantity	Total Cost Basis	Estimated Market Price	Estimated Market Value	Estimated Annual Income	Est Annual Yield%
CASH	0.98	0.98		.98		
ML BANK DEPOSIT PROGRAM	24,567.00	24,567.00	1.0000	24,567.00	25	10
<b>TOTAL</b>		24,567.98		24,567.98	25	10

EQUITIES	Description	Symbol	Acquired	Quantity	Unit Cost Basis	Total Cost Basis	Estimated Market Price	Estimated Market Value	Unrealized Gain/(Loss)	Annual Income	Estimated Current Yield%
BANK OF AMERICA CORP		BAC	10/08/90	3,200	5.2850	16,912.00	15.0600	48,192.00	31,280.00	128	26
CISCO SYSTEMS INC	COM	CSCO	09/26/97	2,248	8.2166	18,470.98	23.9400	53,817.12	35,346.14		
EMERSON ELEC CO		EMR	10/08/90	2,000	8.4300	16,860.00	42.6000	85,200.00	68,340.00	2,680	3.14
GENERAL ELECTRIC		GE	10/08/90	3,600	4.6180	16,625.00	15.1300	54,468.00	37,843.00	1,441	2.64
HEWLETT PACKARD CO	DEL	HPQ	09/26/97	500	28.1565	14,078.29	51.5100	25,755.00	11,676.71	160	62
INTEL CORP		INTC	09/26/97	1,000	23.6741	23,674.10	20.4000	20,400.00	(3,274.10)	560	2.74
PEPSICO INC		PEP	10/08/90	400	11.5254	4,610.17	60.8000	24,320.00	19,709.83	720	2.96
PROCTER & GAMBLE CO		PG	10/08/90	1,600	10.0432	16,069.18	60.6300	97,008.00	80,938.82	2,817	2.90
ROYAL DUTCH SHELL PLC		RDSA	01/01/89	3,450	1.3550	4,674.98	60.1100	207,379.50	202,704.52	9,854	4.75
SPONS ADR A											
VERIGY LTD		VRGY	09/26/97	11	20.8645	229.51	12.8600	141.46	(88.05)		
			N/A	1	N/A	N/A	12.8600	12.86	N/A		
				12		229.51		154.32	(88.05)		
<b>Subtotal</b>											



016



742289500026810002

8371

MERRILL LYNCH

ALLEN-BIRGE CHARITABLE TRUST

Account Number: 683-15G95

TOTAL MERRILL

## YOUR CMA FOR TRUST ASSETS

December 01, 2009- December 31, 2009

EQUITIES (continued) Description	Symbol	Acquired	Quantity	Unit		Total Cost Basis	Estimated Market Price	Estimated Market Value	Unrealized Gain/(Loss)	Annual Income	Estimated Current Yield%
				Cost Basis	Cost Basis						
WAL-MART STORES INC	WMT	10/08/90	100	6 9050	53 4500	690 50	53 4500	5,345 00	4,654 50	109	2 03
		10/08/90	800	6 9075	53 4500	5,526 00	53 4500	42,760 00	37,234 00	872	2 03
Subtotal			900			6,216 50		48,105 00	41,888 50	981	2 03
<b>TOTAL</b>						138 420 71		664,798 94	526 365 37	19,341	2 91

## RESEARCH RATINGS

Security	Symbol	BAS-ML Research Rating	IPR Rating	IPR Rating		IPR Rating	Jaywalk Consensus Rating	
				BUY	SELL		BUY	SELL
CISCO SYSTEMS INC COM	CSCO	B-1-9	Hold -Morningstar	Buy -Standard & Poor's		Buy -Standard & Poor's		1 58
EMERSON ELEC CO	EMR	A-1 7	Hold -Morningstar	Hold -Standard & Poor's		Hold -Standard & Poor's		1 57
GENERAL ELECTRIC	GE	B-2 8	Buy -Morningstar	Hold -Standard & Poor's		Hold -Standard & Poor's		1 59
HEWLETT PACKARD CO DEL	HPQ	B-1 7	Hold -Morningstar	Buy -Standard & Poor's		Buy -Standard & Poor's		1 43
INTEL CORP	INTC	C-2 7	Hold -Morningstar	Buy -Standard & Poor's		Buy -Standard & Poor's		1 42
PEPSICO INC	PEP	A-1 7	Hold -Morningstar	Hold -Standard & Poor's		Hold -Standard & Poor's		1 50
PROCTER & GAMBLE CO	PG	A-2 7	Buy -Morningstar	Buy -Standard & Poor's		Buy -Standard & Poor's		1 52
ROYAL DUTCH SHELL PLC	RDSA	A-1 7	Hold -Morningstar	Hold -Standard & Poor's		Hold -Standard & Poor's		1 92
VERIGY LTD	VRGY	C-2 9	Hold -Morningstar	Buy -Standard & Poor's		Buy -Standard & Poor's		9 99
WAL-MART STORES INC	WMT	A-1 7	Buy -Morningstar	Buy -Standard & Poor's		Buy -Standard & Poor's		1 48

PLEASE REFER TO THE BACK OF YOUR STATEMENT FOR A GUIDE TO YOUR BAS-ML RESEARCH AND IPR RATINGS.

## LONG PORTFOLIO

LONG PORTFOLIO	Adjusted/Total Cost Basis	Estimated Market Value	Unrealized Gain/(Loss)	Estimated Accrued Interest	Estimated Annual Income	Current Yield%
<b>TOTAL</b>	162,988 69	689,366 92	526 365 37		19,365	2 81

Total values exclude N/A items