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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

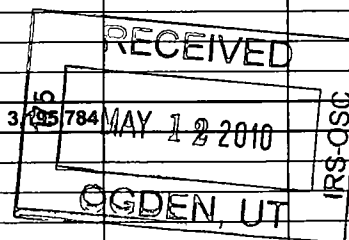
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G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation Edward & Lida Robinson Charitable Trust		A Employer identification number 47-0767603
	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) 402-390-9932
	P.O. Box 241021		
	City or town, state, and ZIP code Omaha, NE 68124-0521		
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) ▶ \$ 4,992,595		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 checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	106,349	106,349		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		3,089,435		
	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	106,349	3,195,784			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	3,000			3,000
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	850	E. Fitzgerald, CPA		850
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	3,000	excisetax		3,000
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	838	Misc.		838
	24 Total operating and administrative expenses. Add lines 13 through 23	7,688			7,688
	25 Contributions, gifts, grants paid	429,500			429,500
26 Total expenses and disbursements. Add lines 24 and 25	437,188			437,188	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	(330,839)				
b Net investment income (if negative, enter -0-)		3,195,784			
c Adjusted net income (if negative, enter -0-)					

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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			4,965	1,660	1,660
	2 Savings and temporary cash investments				1,716,000	1,716,000
	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)			2,460,210	2,614,172	2,371,294
	c Investments—corporate bonds (attach schedule)					
	11 Investments—land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶					
	12 Investments—mortgage loans					
	13 Investments—other (attach schedule)					
	14 Land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶					
	15 Other assets (describe ▶ other cash)			19,701	903,641	903,641
	16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)			2,484,701	5,235,473	4,992,595
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 ▶ outstanding checks)			11,535	3,535	
	23 Total liabilities (add lines 17 through 22)			11,535	3,535	
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			2,473,341	5,231,937	
	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)			2,473,341	5,231,937	
	31 Total liabilities and net assets/fund balances (see page 17 of the instructions)			2,484,701	5,235,473	

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	2,473,341
2 Enter amount from Part I, line 27a	2	(330,839)
3 Other increases not included in line 2 (itemize) ▶ capital gain income	3	3,089,435
4 Add lines 1, 2, and 3	4	5,231,937
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	5,231,937

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	89020 Wyeth Common Stock	D	4-28-94	10-19-09
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 4,486,159		1,396,724	3,089,435	
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(j) F.M.V. as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col. (j) over col. (k), if any		
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	3,089,435
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	

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			
2007			
2006			
2005			
2004			
2 Total of line 1, column (d)			2
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
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4
5 Multiply line 4 by line 3			5
6 Enter 1% of net investment income (1% of Part I, line 27b)			6
7 Add lines 5 and 6			7
8 Enter qualifying distributions from Part XII, line 4			8

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.

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			
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
1				63,919
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
3	Add lines 1 and 2			
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			63,919
6	Credits/Payments:			
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	6,037	
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			6,037
8	Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached			-0-
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			57,879
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11	Enter the amount of line 10 to be: Credited to 2010 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>			

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?		<input checked="" type="checkbox"/>
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)?		<input checked="" type="checkbox"/>
<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?		<input checked="" type="checkbox"/>
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? <i>If "Yes," attach a detailed description of the activities.</i>		<input checked="" type="checkbox"/>
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>		<input checked="" type="checkbox"/>
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		<input checked="" type="checkbox"/>
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? <i>If "Yes," attach the statement required by General Instruction T.</i>		<input checked="" type="checkbox"/>
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?	<input checked="" type="checkbox"/>	
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) >		
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 <i>General Instruction G</i> ? <i>If "No," attach explanation</i>	<input checked="" type="checkbox"/>	
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>		<input checked="" type="checkbox"/>
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		<input checked="" type="checkbox"/>

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 ▶	13	✓	
14	The books are in care of ▶ <u>E.W. Fitzgerald, CPA</u> Telephone no. ▶ <u>402-390-9932</u> Located at ▶ <u>218 South 94th Street Omaha, NE</u> ZIP+4 ▶ <u>68114</u>			
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 type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input 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)? <input type="checkbox"/> 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	
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? (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	✓
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**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
James Roubal 400 Essex Court, Omaha, NE	Trustee 1	-0-	-0-	-0-
Sherry Rathbun 400 Essex Court, Omaha, NE	Trustee 1	-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 **▶**

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

Part IX-A Summary of Direct Charitable Activities

Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)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	4,468,178
b	Average of monthly cash balances	1b	
c	Fair market value of all other assets (see page 24 of the instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	4,468,178
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	
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	67,023
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,401,155
6	Minimum investment return. Enter 5% of line 5	6	220,058

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	220,058
2a	Tax on investment income for 2009 from Part VI, line 5	2a	63,916
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	63,916
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	156,142
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	
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	156,142

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	437,188
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	437,188
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	437,188

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				156,142
2 Undistributed income, if any, as of the end of 2009:				
a Enter amount for 2008 only				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				19,892
e From 2008				134,264
f Total of lines 3a through e	154,156			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 437,188				
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				156,142
e Remaining amount distributed out of corpus	281,046			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	435,202			
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				-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)				
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	435,202			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				19,892
d Excess from 2008				134,264
e Excess from 2009				281,046

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 N/A *f*

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

	Prior 3 years				(e) Total
	Tax year (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:

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Schedule attached		509(a)(1)	Charitable	\$424,500
Archdiocese of Omaha		509(a)(1)	Charitable	5,000
Total			▶ 3a	429,500
b Approved for future payment				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

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 _____						
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						
4 Dividends and interest from securities			14	106,349		
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 capital gain income			18	3,089,435		
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e)				3,195,784		
13 Total. Add line 12, columns (b), (d), and (e)				13	3,195,784	

(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]



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	1a(1)		✓
	(2) Other assets	1a(2)		✓
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		✓
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		✓
	(3) Rental of facilities, equipment, or other assets	1b(3)		✓
	(4) Reimbursement arrangements	1b(4)		✓
	(5) Loans or loan guarantees	1b(5)		✓
	(6) Performance of services or membership or fundraising solicitations	1b(6)		✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		✓
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

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		7 MAY 2010 Date	TRUSTEE Title
Paid Preparer's Use Only	 Preparer's signature	7 MAY 2010 Date	Check if self-employed <input checked="" type="checkbox"/> Preparer's identifying number (see Signature on page 30 of the instructions) 000009490
	Firm's name (or yours if self-employed), address, and ZIP code E.W.Fitzgerald, CPA 218 South 94th Street Omaha, NE 68114	EIN Phone no.	402-390-9932

EDWARD AND LIDA ROBINSON CHARITABLE TRUST
Form 990-PF
2009

Part II, Line 10b

	Cost	FMV
Mutual funds held at Morgan Stanley Smith Barney	\$1,065,673	776,323
87,684 shares Pfizer Common Stock	1,548,499	1,594,971
	<hr/>	<hr/>
Total Line 10b	\$2,614,172	2,371,294

41-0767603

EDWARD AND LIDA ROBINSON CHARITABLE TRUST - 2009 CONTRIBUTIONS

\$426,500	Actual Donated 2009 amount - see note at end of spreadsheet	To The	Area	Phone	Address	City	St	Zip
***\$424,500	Organization donated to:	ATTN Of:	(402)	558-3100	100 N 62nd St	Omaha	NE	68132
\$ 5,500.00	Archdiocesan & Parish Annual Appeal	Not Needed	(402)					
\$ 3,000.00	To honor pledge to the 2009 Annual Appeal		(402)	390-2914	4654 S 132nd St	Omaha	NE	68137
\$ 3,500.00	ALS - Muscular Dystrophy Association	Doug Bickford - Executive Director	(402)	502-4300	1941 S 42nd St	Omaha	NE	68152
\$ 9,500.00	To provide funding for research	Duane J. Gross - President	(402)	293-3707	1000 Galvin Road	Bellevue	NE	68005
\$ 4,000.00	To provide services to families affected by Alzheimer's Disease and related dementias through the Respite Care Program	Dorothy Morrow	(402)	554-0520	3300 North 60th Street	Omaha	NE	68104
\$ 2,500.00	To provide financial aid to help a needy student reach his/her goal of furthering his/her education	John Griffith	(402)	434-5437	6601 Pioneers Blvd Suite 2	Lincoln	NE	68506
\$ 3,500.00	To support individuals and families through counseling programs	James R. Blue - President	(402)	553-6000	4545 Dodge Street	Omaha	NE	68132
\$ 5,000.00	To provide support for families suffering from abuse and neglect through domestic violence	Wanda Gottschalk - Director of Development	(402)	955-6851	8401 W Dodge Road Suite 160	Omaha	NE	68114
\$ 5,000.00	To support therapeutic care programs for teens and their families experiencing serious financial problems and problems associated with domestic violence	Nancy C. Lund - Director of Planned giving	(402)	554-8493	P O Box 4130	Omaha	NE	68104
\$ 6,000.00	To support the Rainbow House which provides a home-like atmosphere for families spending many hours at the bedside of their ill child	Mary Jewell, Treasurer	(402)	391-3606	654 S 86th St	Omaha	NE	68114
\$ 5,000.00	Children's Scholarship Fund of Omaha	Reverend Stillmunks	(402)	399-2400	7000 Mercy Road	Omaha	NE	68106
\$ 10,000.00	To provide tuition assistance for children of low-income families	Maryanne Stevens - President	(402)	393-1190	7400 Western Ave	Omaha	NE	68114
\$ 5,000.00	Christ the King Campaign	Tom Merkel - President	(402)	734-2000	7700 South 43rd Street	Omaha	NE	68147
\$ 5,000.00	To honor pledge to the 2009 Christ the King Campaign	Lynn Couvillon Poly - Director of Development	(402)	826-8258	1014 Boswell Ave	Crete	NE	68333
\$ 1,500.00	College of St. Mary	Jonathan Brand - President	(402)	398-9928	8990 West Dodge Rd, Suite 205	Omaha	NE	68114
\$ 2,500.00	To support the tuition program for students interested in pursuing a career in the health field	Karen Hadley - Executive Director	(402)	721-1185	2415 N Main Street	Fremont	NE	68026
\$ 5,000.00	Doane College	Ron Gieselmann - Executive Director	(402)	475-6741	1222 South 27th Street	Lincoln	NE	68502
\$ 1,500.00	To provide financial assistance to students who do not receive scholarship funds	John Chappo - Executive Director	(402)	468-8170	4840 Doris Bair Circle Suite A	Lincoln	NE	68504
\$ 2,500.00	Domestic Violence Coordinating Council	Scott Young - Director	(402)	331-1213	6824 J St	Omaha	NE	68117
\$ 5,000.00	To supplement the funding for training and public awareness programs geared to stopping domestic violence	Susan Ogborn - President	(402)	434-0163	P O Box 65358	Lincoln	NE	68501
\$ 5,000.00	Eastern Star Home for Children	Amy Evans, Executive Director	(402)	426-3377	2242 Wright Street	Blair	NE	68008
\$ 5,000.00	To provide a Christmas Party for boys and girls residing at the home who otherwise would not have had that holiday experience	Lois Pfeiffer - CEO/Administrator	(402)	444-1493	Omaha World Herald Building	Omaha	NE	68102
\$ 2,000.00	Folsom's Children's Zoo	Joel Long - Employee at Omaha World Herald Ext 1493	(402)	457-5657	2204 Ames Avenue	Omaha	NE	68110
\$ 2,000.00	To provide underprivileged children the opportunity to spend a day at the zoo and attend educational opportunities	Carla Patton	(402)	553-3000	2101 S 42nd St	Omaha	NE	68105
\$ 3,000.00	To assist with the transportation of food to agencies servicing needy families in Omaha	Laura Iliff	(402)	738-2073	8401 West Dodge Rd Suite 100	Omaha	NE	68114
\$ 4,500.00	Food Bank of Lincoln	Calvin R. Sisson - Executive Director	(402)					
\$ 3,000.00	Food Bank, The							
\$ 3,000.00	Friendship Home Shelter							
\$ 4,500.00	For Shelter and support for battered women and their children							
\$ 5,000.00	Good Shepherd Lutheran Home							
\$ 1,500.00	To initiate an endowment fund which would provide continuing education grants to employees in the health care field							
\$ 2,000.00	Goodfellow's Charities							
\$ 2,000.00	Habitat for Humanity							
\$ 8,000.00	Assist in the construction of a home for a needy family in North Omaha							
	Heartland Family Service							
	To provide support for individuals suffering with serious problems such as child abuse, addictions and poverty							
	Henry Dooley Zoo							
	To underwrite field trips for underprivileged children to enjoy a day at the zoo and to participate in educational programs							

\$ 2,000.00	Holy Name Housing Corporation	Sr. Marilyn Ross	(402) 453-6100	3014 North 45th Street	Omaha	NE	68104
	To enable low-income families to become homeowners and gain the sense of pride home ownership brings						
\$ 2,000.00	Homestead Girl Scout Council of Lincoln	Jenny Cardwell - Director of Fund Development	(402) 476-7539	1701 South 17th Street	Lincoln	NE	68502
	To provide financial assistance to the camping program allowing financial disadvantaged youth to attend a camping experience						
\$ 3,000.00	Jesuit Middle School	Stephanie Kremia Heng - Development Director	(402) 346-4464	2311 North 22nd Street	Omaha	NE	68110
	To help support the Education Club in providing financial support to needy families through their tuition program and provide an interesting curriculum to all students						
\$ 1,500.00	John Beasley Theater and Workshop	Judith Beasley - Office Manager	(402) 502-5767	2505 N 24th St, Suite 201	Omaha	NE	68111
	To support the theater in its effort to offer minorities an opportunity to learn and expand their talents in the area of theater and production						
\$ 3,000.00	KVNO - University of Nebraska - Omaha	Kim Balkovec - Membership Manager	(402) 554-5866	6001 Dodge St CB 200	Omaha	NE	68182
	To help support the programming which provides educational and cultural programs						
\$ 5,000.00	Make-A-Wish Foundation	Brigette Young	(402) 333-8999	11926 Arbor Street	Omaha	NE	68144
	To help make a "wish come true" for a Nebraska Child with a life threatening illness						
\$ 2,000.00	Merrymakers Association	Mary L. O'Brien - Executive Director	(402) 697-0205	11213 Davenport Street, Suite 201	Omaha	NE	68154
	To help defray costs of volunteers who provide music and entertainment to the elderly residing in nursing homes in the area						
\$ 3,000.00	Metropolitan Community College	Patricia Crtisler - Associate Vice President	(402) 457-2346	30th & Fort St, P O Box 3777	Omaha	NE	68103
	To provide financial assistance to needy students for tuition assistance, books and supplies						
\$ 2,500.00	Multiple Sclerosis Society	Stacy Schultz	(402) 505-4000	328 S 72nd St	Omaha	NE	68114
	To provide a "Getaway Weekend" for people suffering from MS and their families to enjoy a time of relaxation and companionship						
\$ 1,500.00	My Sister's Keeper	Jacqueline Hill	(402) 457-6425	4548 Saratoga St	Omaha	NE	68104
	To help provide support to an individual dealing with the pain and expense of cancer						
\$ 3,000.00	Nebraska Society of Professional Engineers Education Foundation	Michael Gerdes - Executive Director	(402) 556-2171	13478 Chandler Rd	Omaha	NE	68138
	To help students develop math skills for the 6th through 8th grade students in Nebraska Schools						
\$ 2,500.00	Omaha Christian Academy	Kathy Larsen	(402) 399-9565	10244 Wiesman Drive	Omaha	NE	68134
	To enhance the educational aspect of the program						
\$ 2,000.00	Omaha Home for Boys	R. Todd Simpson - CFR & Dir of Development	(402) 457-7000	4343 North 52nd Street	Omaha	NE	68104
	To promote support and care to at-risk and needy youth						
\$ 6,000.00	Omaha Schools Foundation/Joslyn Art Museum field trips	Luann Nelson - Executive Director	(402) 557-2070	3215 Cumming St	Omaha	NE	68131
	To defray costs of a tour of 4th grade students of OPS to explore the art and history of our region at the Museum's Art of the American West Galleries						
\$ 5,000.00	Open Door Mission & Lydia House	Candace L. Gregory - President/CEO	(402) 422-1111	2828 N 23rd St East	Omaha	NE	68110
	To support the Open Door Mission and Lydia House meet the needs of homeless people by supplying food, clothing, shelter, counseling and minor medical services						
\$ 2,500.00	Peoples City Mission	Pastor Tom Barber	(402) 475-1303	110 Q St, P O Box 80636	Lincoln	NE	68501
	To provide support for homeless people in Lincoln						
\$ 1,500.00	PULSE	Sadie Bankston	(402) 706-1861	P O Box 11506	Omaha	NE	68111
	To support grieving families and efforts in reaching at risk youths in the Omaha Area						
\$ 3,500.00	Radio Talking Book Services	John C. Fullerton - Executive Director	(402) 572-3003	7101 Newport Avenue Suite 205	Omaha	NE	68152
	To provide supplies to visually disabled and blind persons with printed materials and receivers						
\$ 2,500.00	R.E.S.P.E.C.T	Patricia Newman	(402) 930-2001	820 S 75th St	Omaha	NE	68114
	To provide education opportunities for students through the scholarship fund program						
\$ 6,000.00	Ronald McDonald House of Omaha	Kevin Warneke	(402) 346-9377	620 South 38th Avenue	Omaha	NE	68105
	To provide supplies and operation costs as they continue to serve many families with sick children with lodging and assistance during a stay away from their homes						
\$ 3,500.00	Rotary Club of Omaha/Suburban	Jennifer Jrak-Brungardt	(402) 397-7335	4089 S 84th St PMB 317	Omaha	NE	68127
	To participate in the scholarship program for high school seniors with disabilities giving them confidence in their achievement while becoming productive members of our community						
\$ 6,000.00	Sacred Heart School	Rev Thomas Fangman-Executive Director	(402) 451-5755	2207 Wirt Street	Omaha	NE	68110
	To help cover tuition costs and support the Read to Achieve Program						
\$ 3,000.00	Saint Elizabeth Foundation	Donna K. Hammack - Foundation Director	(402) 219-7052	6900 L Street	Lincoln	NE	68510
	To support the burn program at St. Elizabeth Regional Medical Center to purchase therapeutically approved supplies						
\$ 3,000.00	Salvation Army - Lincoln	Major Paul Smith	(402) 474-6263	2625 Potter Street	Lincoln	NE	68503
	To provide food for hungry families, warm clothing for those who have none, and toys for children whose parents cannot afford them						
\$ 4,000.00	Salvation Army - Omaha	Major Paul Smith	(402) 898-5900	3612 Cumming Street	Omaha	NE	68131
	To provide Christmas needs and support for ongoing year-round programs which benefit local families who are in need						
\$ 3,000.00	Scleroderma Research Foundation	Amy Hewitt - Executive Director	(415) 834-9444	220 Montgomery St suite 1411	San Fran	CA	94104
	Assist in the research to find a cure for scleroderma						
\$ 6,000.00	Siena Francis House	Mike Saklar-Executive Director	(402) 341-1821	P O Box 217 - Downtown Station	Omaha	NE	68101
	To continue to support and care for the homeless and economically disadvantaged of our community						

\$ 5,000.00	Southeast Community College & Milford Campus	Theodore G. Suhr - Secretary/Treasurer	(402) 323-3400	301 S 68th St. Place	Lincoln	NE	68510
	To provide financial assistance to needy students for emergency fees, books and supplies required for students to pursue their chosen vocation						
\$ 3,000.00	St. Peter Claver Cristo Rey Catholic High School	Fr. James Keiter	(402) 734-1802	5301 S 36th St	Omaha	NE	68107
	to support the internship and college preparatory education programs for economically disadvantaged students						
\$ 4,000.00	Tabitha Foundation	David Fuerst Vice President	(402) 483-7671	4720 Randolph Street	Lincoln	NE	68510
	To be included in the Home Health Care and Hospice programs to assist individuals suffering from terminal illness allowing them to remain in their homes with care						
\$ 3,500.00	Tangler Shriner Center	James B. Parks	(402) 392-0404	2823 S 84th St	Omaha	NE	68124
	To support the Transportation Fund for transporting patients to Twin Cities Shrine Hospital for Children, Chicago Shrine Hospital in Chicago and the Galveston Shrine Hospital Bum Center in Texas						
\$ 80,000.00	University of Nebraska Foundation	Clarence L. Castner, President	(402) 502-0300	2285 S 67th St. Suite 200	Omaha	NE	68106
	Joint Venture with DLR Group (Ken West) - fund scholarships and other financial needs for students in the Durham School of Architecture Engineering and Construction						
\$ 115,000.00	University of Nebraska Foundation	Amy Volk- Vice President	(402) 502-0300	2285 S 67th St. Suite 200	Omaha	NE	68106
	To be included in the following funds Bone Marrow Transplantation and Related Cancer Research, The endowed Funds for Nursing Scholarships, Genatnc Research and Neuroirology and Neurodegenerative Disease Resear						
\$ 10,000.00	Visiting Nurse Association	James Summerfelt - President	(402) 342-5566	12565 West Center Road	Omaha	NE	68144
	To be included in the Home Health Care Program to assist patients to be able to live in their homes						
\$ 2,000.00	Youth Emergency Services	Robert Storey	(402) 345-5187	2679 Farnam St	Omaha	NE	68131
	Providing a Drop-In center to furnish basic health care, short term shelter and other living essentials						
\$ 1,500.00	Youth for Christ of Greater Omaha	Darrell Webb - Executive Director	(402) 597-9323	5062 South 108th St PMB 160	Omaha	NE	68137
	To teach youth and families through Campus Life Ministries						
\$ 2,500.00	YWCA - Omaha	Ralph Kellogg - Director of Finance	(402) 345-6555	222 S 29th St	Omaha	NE	68131
	To help fund for domestic violence & sexual assault						
Note: Difference in total is due to "Heartland Family Visitation Center" donation of \$2000.00 - Check was never cashed, tried on several occasions to contact number was disconnected							
E-mails would not go through. Mr. Roubal stopped payment on check							
\$2,000	Heartland Family Visitation Center	Cody Van Winkle - Director	308	385-5650	204 N Locust St	Grand IS	NE 68801
	To provide supervised services for children who have lived with domestic violence						