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Return of Private Foundation

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Serviceor 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

For calendar year 2009, or tax year beginning

, and ending

G Check all that apply

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeUse the IRS
label.
Otherwise,
print
or type.
See Specific
Instructions.

Name of foundation

HENRY E. WURST FAMILY FOUNDATION

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

1331 SALINE STREET

Room/suite

City or town, state, and ZIP code

KANSAS CITY, MO 64116

A Employer identification number

48-6107464

B Telephone number

(816) 842-3113

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 computation ☐E If private foundation status was terminated
under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination
under section 507(b)(1)(B), check here ☐

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)

\$ 2,911,544. (Part I, column (d) must be on cash basis.)

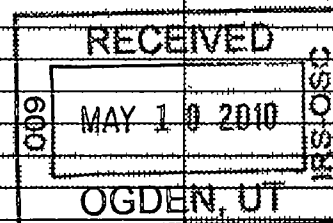
J Accounting method

☒ Cash☐ Accrual☐ Other (specify)

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not
necessarily equal the amounts in column (a).)(a) Revenue and
expenses per books(b) Net investment
income(c) Adjusted net
income(d) Disbursements
for charitable purposes
(cash basis only)

Revenue	1	Contributions, gifts, grants, etc., received	0.	N/A	
	2	Check <input checked="" type="checkbox"/> If the foundation is not required to attach Sch B			
	3	Interest on savings and temporary cash investments			
	4	Dividends and interest from securities	87,333.	87,333.	STATEMENT 1
	5a	Gross rents			
	b	Net rental income or (loss)			
	6a	Net gain or (loss) from sale of assets not on line 10	<343,310.>		
	b	Gross sales price for all assets on line 6a	636,711.		
	7	Capital gain net income (from Part IV, line 2)		0.	
	8	Net short-term capital gain			
	9	Income modifications			
	10a	Gross sales less returns and allowances			
b	Less: Cost of goods sold				
c	Gross profit or (loss)				
11	Other income				
12	Total. Add lines 1 through 11	<255,977.>	87,333.		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0.	0.	0.
	14	Other employee salaries and wages			
	15	Pension plans, employee benefits			
	16a	Legal fees			
	b	Accounting fees			
	c	Other professional fees	9,350.	9,350.	0.
	17	Interest			
	18	Taxes			
	19	Depreciation and depletion			
	20	Occupancy			
	21	Travel, conferences, and meetings			
	22	Printing and publications			
	23	Other expenses	495.	0.	440.
	24	Total operating and administrative expenses. Add lines 13 through 23	9,845.	9,350.	440.
	25	Contributions, gifts, grants paid	122,395.		122,395.
26	Total expenses and disbursements. Add lines 24 and 25	132,240.	9,350.	122,835.	
27	Subtract line 26 from line 12	<388,217.>			
a	Excess of revenue over expenses and disbursements				
b	Net investment income (if negative, enter -0-)		77,983.		
c	Adjusted net income (if negative, enter -0-)			N/A	



9

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		111,353.	290,282.	290,282.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock STMT 5	2,954,649.	2,463,484.	2,474,967.	
	c	Investments - corporate bonds STMT 6	213,637.	137,656.	146,295.	
11	Investments - land, buildings, and equipment basis ▶					
	Less: accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other					
14	Land, buildings, and equipment basis ▶					
	Less: accumulated depreciation ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers)		3,279,639.	2,891,422.	2,911,544.	
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				
	22	Other liabilities (describe ▶)				
23	Total liabilities (add lines 17 through 22)		0.	0.		
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	0.	0.		
28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.			
29	Retained earnings, accumulated income, endowment, or other funds	3,279,639.	2,891,422.			
30	Total net assets or fund balances	3,279,639.	2,891,422.			
31	Total liabilities and net assets/fund balances	3,279,639.	2,891,422.			

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	3,279,639.
2	Enter amount from Part I, line 27a	2	<388,217.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	2,891,422.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,891,422.

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			
b SEE ATTACHED STATEMENT			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 636,711.		980,021.	<343,310.>

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))
a			
b			
c			
d			
e			<343,310.>

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	<343,310.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	{ }	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	153,617.	3,116,379.	.049293
2007	182,163.	3,742,509.	.048674
2006	170,547.	3,500,829.	.048716
2005	166,046.	3,365,580.	.049337
2004	161,120.	3,305,737.	.048740

2 Total of line 1, column (d)	2	.244760
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	.048952
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	2,522,221.
5 Multiply line 4 by line 3	5	123,468.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	780.
7 Add lines 5 and 6	7	124,248.
8 Enter qualifying distributions from Part XII, line 4	8	122,835.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		1	1,560.
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)		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	1,560.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	1,560.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	3,360.	
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	3,360.	
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	1,800.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input type="checkbox"/> 1,800. Refunded <input type="checkbox"/> 0.	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
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> MO		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11	X	
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► MR. JOHN C WURST Located at ► 1331 SALINE ST., KANSAS CITY, MO	Telephone no ► (816) 842-3113 ZIP+4 ► 64116		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	► 15	N/A	

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

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

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

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

X

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

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JOHN C WURST 1331 SALINE STREET KANSAS CITY, MO 64116	CHAIRMAN 0.50	0.	0.	0.
MICHAEL S WURST 1331 SALINE STREET KANSAS CITY, MO 64116	VICE-CHAIR 0.50	0.	0.	0.
MARGARET S WURST 1331 SALINE STREET KANSAS CITY, MO 64116	SECRETARY 15.00	0.	0.	0.

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

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

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

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	2,391,527.
b	Average of monthly cash balances	1b	169,103.
c	Fair market value of all other assets	1c	0.
d	Total (add lines 1a, b, and c)	1d	2,560,630.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	2,560,630.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	38,409.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,522,221.
6	Minimum investment return. Enter 5% of line 5	6	126,111.

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

1	Minimum investment return from Part X, line 6	1	126,111.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	1,560.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	1,560.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	124,551.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	124,551.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	124,551.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	122,835.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	122,835.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	122,835.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				124,551.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009.				
a From 2004				
b From 2005	3,245.			
c From 2006				
d From 2007	1,506.			
e From 2008	1,132.			
f Total of lines 3a through e	5,883.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 122,835.				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				122,835.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	1,716.			1,716.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e. Subtract line 5	4,167.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr.			0.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	4,167.			
10 Analysis of line 9				
a Excess from 2005	1,529.			
b Excess from 2006				
c Excess from 2007	1,506.			
d Excess from 2008	1,132.			
e Excess from 2009				

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

N/A

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

►

- b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

- 2 a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

b 85% of line 2a

c Qualifying distributions from Part XII,
line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

**e Qualifying distributions made directly
for active conduct of exempt activities**

Subtract line 2d from line 2c

- 3 Complete 3a, b, or c for the alternative test relied upon:

- (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 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 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

MARGARET S WURST

1331 SALINE STREET, KANSAS CITY, MO 64116

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

NO SPECIFIC FORM-REQUEST SHOULD BE AS COMPLETE AS POSSIBLE.

- c Any submission deadlines**

NONE

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

PRIMARILY IN GEOGRAPHIC AREAS WHERE THE OFFICES OF HENRY WURST, INC. ARE LOCATED.

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
<i>a Paid during the year</i> SEE ATTACHED STATEMENT 7				122,395.
Total			3a	122,395.
<i>b Approved for future payment</i> SEE ATTACHED STATEMENT 8				16,000.
Total			3b	16,000.

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
		(a) Business code	(b) Amount	(c) Exclu- sion 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	87,333.	
5	Net rental income or (loss) from real estate					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory			18	<343,310.>	
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)		0.		<255,977.>	0.
13	Total. Add line 12, columns (b), (d), and (e)					<255,977.>

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

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

[illegible]

HENRY E. WURST FAMILY FOUNDATION

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	CALAMOSE INVT TR NEW GROWTH FD-A	P	06/22/04	02/02/09
b	TOUCHSTONE INSTL FDS TR	P	11/30/05	02/02/09
c	WESTERN ASSET MANAGED HIGH INCOME FUND	P	02/26/02	07/31/09
d	ING	P	05/22/03	09/14/09
e	VAN KAMPEN SENIOR INCOME TRUST	P	10/22/01	09/14/09
f	WACHOVIA PREFERRED FUNDING	P	09/01/04	09/14/09
g	GMAC SMARTNOTES	P	09/22/03	10/21/09
h	MORGAN STANLEY EMERG MKTS DEBT INC	P	02/25/04	11/24/09
i	EATON VANCE TAX ADVANGD DIVIDEND INCOME FD	P	01/12/04	12/07/09
j	BRIDGEWAY FD INC	P	11/30/05	12/07/09
k				
l				
m				
n				
o				

(a) 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 101,811.		179,119.	<77,308.>
b 112,249.		204,884.	<92,635.>
c 36,804.		49,981.	<13,177.>
d 23,710.		36,761.	<13,051.>
e 16,434.		34,829.	<18,395.>
f 57,635.		69,313.	<11,678.>
g 15,898.		25,000.	<9,102.>
h 20,612.		19,362.	1,250.
i 72,621.		94,611.	<21,990.>
j 178,937.		266,161.	<87,224.>
k			
l			
m			
n			
o			

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			<77,308.>
b			<92,635.>
c			<13,177.>
d			<13,051.>
e			<18,395.>
f			<11,678.>
g			<9,102.>
h			1,250.
i			<21,990.>
j			<87,224.>
k			
l			
m			
n			
o			

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	<343,310.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8 }	3	N/A

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
UBS SECURITIES	87,333.	0.	87,333.
TOTAL TO FM 990-PF, PART I, LN 4	87,333.	0.	87,333.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEE	9,350.	9,350.		0.
TO FORM 990-PF, PG 1, LN 16C	9,350.	9,350.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DUES & SUBSCRIPTIONS	440.	0.		440.
OFFICE SUPPLIES	55.	0.		0.
TO FORM 990-PF, PG 1, LN 23	495.	0.		440.

FOOTNOTES	STATEMENT	4
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MINIMAL BOOKKEEPING SERVICES FOR THE FOUNDATION ARE PROVIDED BY EMPLOYEES OF HENRY WURST, INC. THE VALUE OF TIME SPENT IS MINIMAL, ALTHOUGH REASONABLE AND NECESSARY TO CARRYING OUT THE FOUNDATION'S EXEMPT PURPOSE.

FORM 990-PF	CORPORATE STOCK	STATEMENT	5
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK	2,463,484.	2,474,967.
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,463,484.	2,474,967.

FORM 990-PF	CORPORATE BONDS	STATEMENT	6
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	137,656.	146,295.
TOTAL TO FORM 990-PF, PART II, LINE 10C	137,656.	146,295.

**HEW Family Foundation
2009 Contributions**

Vendor	Date	Contribution	Address line 1	Address line 2	City ST ZIP	Payment type
Assoc of Small Foundations	1/28/09	495.00	33 Wild Berry Lane	PO Box 117	Underhill, VT 05489-0117	002- education*
Musical Theater Heritage	1/26/09	1,000.00	1600 Genesca Ave	Suite 810	Kansas City, MO 64102	003- arts
Big Brothers/Big Sis Douglas Co	2/4/09	250.00	1525 W 6th Street		Lawrence, KS 66044	001- welfare
Champions of Character, NAI	2/5/09	500.00	1200 Grand Blvd		Kansas City, MO 64106	002- education
Independent College Fund of NC	2/5/09	1,600.00	879-A Washington St		Raleigh, NC 27605	002- education
Fuquay-Varina Athletic Associa	2/10/09	500.00	525 N. Main St		Fuquay-Varina, NC 27526	001- welfare
Kansas City Ballet	2/10/09	1,000.00	1616 Broadway Blvd		Kansas City, MO 64108-1207	003- arts
Wake Technical Comm College	2/10/09	3,000.00	9101 Fayetteville Road		Raleigh, NC 27603	002- education
YMCA of Metropolitan Denver	2/10/09	5,000.00	2625 S Colorado Blvd		Denver, CO 80222	001- welfare
De La Salle Education Center	2/23/09	2,000.00	3740 Forest		Kansas City, MO 64109-3200	002- education
Heart of America Council BSA	3/2/09	5,000.00	10210 Holmes Road		Kansas City, MO 64131-4212	002- education
USBIC Educational Foundation	3/10/09	100.00	910 16th St NW Ste 300		Washington, DC 20006	002- education
Boys & Girls Clubs of KC	4/13/09	8,000.00	6301 Rockhill Road #305		Kansas City, MO 64131	002- education
Kansas Independent College	4/14/09	1,500.00	700 S Kansas Ave Suite 511		Topeka, KS 66603-3825	002- education
Salvation Army - KC	4/27/09	50.00	P O Box 412577		Kansas City, MO 64141-2577	001- welfare
YMCA of the Rockies	4/27/09	100.00			Estes Park, CO 80517	001- welfare
CCVI	5/6/09	500.00	3101 Main		Kansas City, MO 64111	002- education
Kansas City Metropolitan Crime Commis	5/1/09	100.00	3100 Main- Suite 201		Kansas City, MO 64111	004- civic
WakeMed Foundation	5/5/09	1,250.00	PO Box 14465		Raleigh, NC 27690-2002	001- welfare
Wildwood Outdoor Education	5/1/09	1,500.00	7095 W 399th Street		LaCygne, KS 66040	002- education
Boys & Girls Clubs Raleigh, NC	6/2/09	3,500.00	701 Raleigh Blvd	P O Box 14337	Raleigh, NC 27620	002- education
Missoun Colleges Fund	6/2/09	1,800.00	3401 W. Truman Blvd. Ste 319		Jefferson City, MO 65109-6892	002- education
YMCA Southwest Wake NC	6/2/09	4,000.00	1610 Center Street	Suite 104	Apex, NC 27502	001- welfare
YMCA of Greater Kansas City	6/4/09	5,000.00	3100 Broadway Suite 1020		Kansas City, MO 64111-9824	001- welfare
Shepherd's Center of KC	6/9/09	100.00	5200 Oak Street		Kansas City, MO 64112-2807	001- welfare
Wichita State University Foundation	6/10/09	100.00	1845 Fairmount		Wichita, KS 67260	002- education
American Royal Association	6/15/09	350.00	1701 American Royal Court		Kansas City, MO 64102	004- civic
Denver Area Council/Boy Scouts	6/15/09	2,500.00	2901 W 19th Ave		Denver, CO 80204	002- education
De La Salle Education Center	6/29/09	3,000.00	3740 Forest		Kansas City, MO 64109-3200	002- education
Town of Apex	8/4/09	950.00	P O. Box 250		Apex, NC 27502	004- civic
Folly Theater	8/6/09	500.00	300 West 12th Street		Kansas City, MO 64105	004- civic
Kansas City Symphony	8/6/09	500.00	1020 Central		Kansas City, MO 64105	003- arts
Ocooneechee Council/Boy Scouts	8/6/09	1,000.00	P O Box 41229		Raleigh, NC 27629-1229	002- education
Junior Achievement /Middle Am.	8/12/09	1,000.00	4049 Pennsylvania Ste 150		Kansas City, MO 64111	002- education
Landmark Legal Foundation	8/12/09	100.00	3100 Broadway, Suite 515		Kansas City, MO 64111	001- welfare
John Wornall House Museum	8/13/09	100.00	6115 Wornall Road		Kansas City, MO 64113	002- education
Ozanam	9/1/09	250.00	421 E. 137th Street		Kansas City, MO 64145	001- welfare
St Peter's School	9/8/09	600.00	6400 Charlotte		Kansas City, MO 64131	002- education
KIPP Endeavor Academy	9/14/09	500.00	2700 E. 18th Street		Kansas City, MO 64127	002- education
Childrens Flight of Hope	9/15/09	100.00	130 Edinburgh South Suite 203		Cary, NC 27511	001- welfare
YMCA of Greater Kansas City	11/11/09	2,000.00	3100 Broadway Suite 1020		Kansas City, MO 64111-9824	001- welfare
YMCA of Metropolitan Denver	11/11/09	2,000.00	2625 S Colorado Blvd		Denver, CO 80222	001- welfare
YMCA of the Triangle Area	11/11/09	2,000.00	801 Corporate Center Drive	Suite 200	Raleigh, NC 27607-5073	001- welfare
YMCA of the Triangle Area	11/11/09	3,000.00	801 Corporate Center Drive	Suite 200	Raleigh, NC 27607-5073	001- welfare
Colorado Ballet	11/12/09	500.00	1278 Lincoln St		Denver, CO 80203	003- arts
Denver Center	11/12/09	500.00	for the Performing Arts		Denver, CO 80204-2104	003- arts
Donnelly College	11/12/09	500.00	608 N 18th Street	1245 Champs St	Kansas City, KS 66102	002- education

Statement 7 1 of 2

**HEW Family Foundation
2009 Contributions**

Vendor	Date	Contribution	Address line 1	Address line 2	City ST ZIP	Payment type
Salvation Army - Raleigh 10666	11/12/09	1,000.00	P O Box 10666		Raleigh, NC 27605	001- welfare
Camp Wood YMCA	11/17/09	2,000.00	Rt 1 Box 798		Elmdale, KS 66850	002- education
Gordon Parks Elementary School	11/17/09	300.00	3715 Wyoming		Kansas City, MO 64111	002- education
Planned Parenthood of KS-MO	11/17/09	4,000.00	4401 W 109th St	Suite 200	Overland Park, KS 66211	002- education
Boys & Girls Club-Metro Denver	11/18/09	3,000.00	2017 W 9th Avenue		Denver, CO 80204	002- education
Exchange City & Earthworks- Kansas City	11/18/09	500.00	8300 NE Underground Drive	108H	Kansas City, MO 64131	002- education
Girl Scouts NC Coastal Pines	12/9/09	500.00	PO Box 52294		Raleigh, NC 27612	002- education
Planned Parenthood	12/9/09	500.00	of the Capital and Coast			002- education
Camp Fire USA Heartland Council	12/15/09	3,000.00	7930 State Line Rd		Prairie Village, KS 66208	002- education
Girl Scouts of Mid-Continent	12/15/09	3,000.00	Council		Kansas City, MO 64133	002- education
Kansas City Young Audiences	12/15/09	250.00	5601 Wyandotte		Kansas City, MO 64113	003- arts
Science Pioneers	12/15/09	100.00	Midwest Research Institute		Kansas City, MO 64110-2241	002- education
The Children's Place	12/15/09	250.00	2 East 59th Street		Kansas City, MO 64113	001- welfare
TMC Charitable Foundation	12/16/09	1,000.00	2310 Holmes	Suite 735	64108, MO	001- welfare
Western Wake Crisis Ministries	12/16/09	1,000.00	103 1/2 E Chatham St		Apex, NC 27502	001- welfare
Youth Symphony of KC	12/16/09	100.00	5960 Dearborn Suite 206		Mission, KS 66202	002- education
Colorado Symphony Orchestra	12/17/09	500.00	999 18th St Ste 2005		Denver, CO 80202	003- arts
Denver Rescue Mission	12/17/09	1,000.00	P O. Box 17973		Denver, CO 80217-9658	001- welfare
Girl Scouts - Mile Hi Council	12/17/09	1,500.00	400 S Broadway		Denver, CO 80209	002- education
Junior Achievement	12/17/09	500.00	of the Rocky Mountains		Denver, CO 80202	002- education
Planned Parenthood	12/17/09	1,000.00	of the Rocky Mountains		Denver, CO 80207-1630	002- education
Salvation Army Intermountain D	12/17/09	2,000.00	1370 Pennsylvania Street		Denver, CO 80203	001- welfare
Tennynson Center for Children	12/17/09	1,000.00	at Colorado Christian Home		Denver, CO 80212	001- welfare
Children's TLC	12/21/09	250.00	3101 Main		Kansas City, MO 64111	001- welfare
Della Lamb Community Service	12/21/09	2,000.00	500 Woodland Ave		Kansas City, MO 64106-9908	001- welfare
Musical Theater Heritage	12/21/09	500.00	1600 Genesca Suite 810		Kansas City, MO 64102	003- arts
Spofford	12/21/09	1,000.00	9700 Grandview Road		Kansas City, MO 64134-0888	001- welfare
reStart	12/21/09	1,000.00	918 E 9th Street		Kansas City, MO 64106-3072	001- welfare
Camps For Kids	12/22/09	3,000.00	1080 Washington		Kansas City, MO 64105	001- welfare
Children's Mercy Hospital	12/22/09	500.00	2401 Gilham Road		Kansas City, MO 64108	001- welfare
Family Conservancy	12/22/09	500.00	626 Minnesota Ave		Kansas City, KS 66101	001- welfare
Genesis School	12/22/09	2,000.00	3800 E 44th St		Kansas City, MO 64130	002- education
Humane Society of Greater Kansas City	12/22/09	500.00	5445 Parallel Parkway		Kansas City, KS 66104	001- welfare
Salvation Army - KC	12/22/09	3,000.00	P O. Box 412577		Kansas City, MO 64141-2577	001- welfare
Students in Free Enterprise	12/22/09	500.00	1959 East Kerr Street		Springfield, MO 65803	002- education
Synergy Services, Inc	12/22/09	2,500.00	400 E. 6th St		Parkville, MO 64152	001- welfare
Don Bosco Centers	12/28/09	500.00	531 Garfield		Kansas City, MO 64124	001- welfare
Higher M	12/28/09	500.00	PO Box 11718		Kansas City, MO 64138	002- education
KCPT	12/28/09	1,000.00	125 E 31st Street		Kansas City, MO 64108	002- education
Turning Point	12/28/09	250.00	8900 State Line Road Ste 240		Shawnee Mission, KS 66208	001- welfare
Women's Employment Network	12/28/09	1,000.00	1734 E 63rd Street	Suite 300	Kansas City, MO 64110	002- education
City Union Mission	12/29/09	2,000.00	P O Box 270107		Kansas City, MO 64127	001- welfare
Kansas City Repertory Theatre	12/29/09	1,500.00	4949 Cherry		Kansas City, MO 64110	003- arts
Rose Brooks	12/29/09	500.00	P O Box 10453		Kansas City, MO 64171	001- welfare
Total		122,395.00				

Statement 7 2 of 2

Henry E. Wurst Family Foundation
48-6107464

JANUARY 2010

FOUNDATION - FUTURE CONTRIBUTIONS

	<u>2010</u>	<u>2011</u>	<u>2012</u>	<u>2013</u>
Boys & Girls Clubs - KC	8000			
DeLaSalle	2000	2000	2000	2000

Statement 8