Form **990-PF**

Department of the Treasury
Internal Revenue Service

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.

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning , 2009, and ending , 20

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.

Name of foundation
SECURITY BENEFIT LIFE CHARITABLE TRUST

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
ONE SECURITY BENEFIT PLACE

City or town, state, and ZIP code
TOPEKA, KS 66636

A Employer identification number
48-6211612

B Telephone number (see page 10 of the instructions)

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: [X] 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)* ▶ $ 59,002

J Accounting method: ☐ Cash [X] Accrual
☐ Other (specify) ____________________
(Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions).)*

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3 Interest on savings and temporary cash investments	48	48	48	
	4 Dividends and interest from securities				
	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)				
	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	48	48	48	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	42	42		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 **Total operating and administrative expenses.** Add lines 13 through 23	42	42		
	25 Contributions, gifts, grants paid	244,382			244,382
	26 **Total expenses and disbursements** Add lines 24 and 25	244,424	42		244,382
	27 Subtract line 26 from line 12.				
	a **Excess of revenue over expenses and disbursements**	-244,376			
	b **Net investment income** (if negative, enter -0-)		6		
	c **Adjusted net income** (if negative, enter -0-)			48	

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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)

	Line	Description	Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1	Cash - non-interest-bearing	45,812		
	2	Savings and temporary cash investments	257,566	59,002	59,002
	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			
	10 a	Investments - U S and state government obligations (attach schedule)			
	b	Investments - corporate stock (attach schedule)			
	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 ▶)			
	16	**Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item I)	303,378	59,002	59,002
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 ▶)			
	23	**Total liabilities** (add lines 17 through 22)			
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ 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 and complete lines 27 through 31. ▶ ☒			
	27	Capital stock, trust principal, or current funds	162,198		
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	141,180	59,002	
	30	**Total net assets or fund balances** (see page 17 of the instructions)	303,378	59,002	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	303,378	59,002	

Part III Analysis of Changes in Net Assets or Fund Balances

	Description	Line	Amount
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	303,378
2	Enter amount from Part I, line 27a	2	-244,376
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	59,002
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	59,002

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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				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e				

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

	(i) F M V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col (k), but not less than -0-) or Losses (from col. (h))
a				
b				
c				
d				
e				

2 Capital gain net income or (net capital loss) . . . . . { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 } 2

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	476,158	592,424	0.8037
2007	520,421	953,503	0.5458
2006	518,888	1,578,419	0.3287
2005	515,703	1,461,324	0.3529
2004	526,274	1,072,899	0.4905

2	**Total** of line 1, column (d)	2	2.5216
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	0.5043
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	174,572
5	Multiply line 4 by line 3	5	88,037
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	0
7	Add lines 5 and 6	7	88,037
8	Enter qualifying distributions from Part XII, line 4	8	244,382

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 ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ____________ (attach copy of ruling letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b	1	1
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	
3	Add lines 1 and 2	3	1
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	1
6	Credits/Payments:		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 6a		
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	
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	1
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be: **Credited to 2010 estimated tax** ▶ **Refunded** ▶	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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	*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.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ▶ $ ____________ (2) On foundation managers ▶ $ ____________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ ____________			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		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*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		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?	6	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*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ KANSAS			
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*	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

Part VII-A Statements Regarding Activities *(continued)*

		Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		X
12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶

14 The books are in care of ▶ SUSAN LACEY - CONTROLLER Telephone no. ▶ 785-438-3000

Located at ▶ ONE SECURITY BENEFIT PLACE, TOPEKA, KS ZIP + 4 ▶ 66636-0001

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ 15

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

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

1a During the year did the foundation (either directly or indirectly):

(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No

(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No

(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No

(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No

(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No

(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No

		Yes	No
b If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		
Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c		X

2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):

a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? ☐ Yes ☒ No
If "Yes," list the years ▶ ____, ____, ____, ____

		Yes	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 page 20 of the instructions.)	2b		X

c If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here.
▶ ____, ____, ____, ____

3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No

		Yes	No
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)*	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)*

			Yes	No
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		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?		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
KRIS ROBBINS TOPEKA, KS 66636	INDIVIDUAL TRUSTEE	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 ▶

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

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

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

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 NOT APPLICABLE	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)

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

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

1	Fair-market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	146,311
b	Average of monthly cash balances	1b	30,919
c	Fair market value of all other assets (see page 24 of the instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	177,230
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	177,230
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	2,658
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	174,572
6	**Minimum investment return.** Enter 5% of line 5	6	8,729

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	8,729
2a	Tax on investment income for 2009 from Part VI, line 5	2a	1		
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	1
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	8,728
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	8,728
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	8,728

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	244,382
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	244,382
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	1
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	244,381

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				8,728
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 473,163				
b From 2005 443,489				
c From 2006 441,984				
d From 2007 474,418				
e From 2008 446,621				
f **Total** of lines 3a through e	2,279,675			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ $ 244,382				
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				8,728
e Remaining amount distributed out of corpus	236,104			
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	2,515,779			
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				
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)	473,163			
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a	2,042,616			
10 Analysis of line 9:				
a Excess from 2005 ... 443,489				
b Excess from 2006 ... 441,984				
c Excess from 2007 ... 474,418				
d Excess from 2008 ... 446,621				
e Excess from 2009 ... 236,104				

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

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test-enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942 (j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

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

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

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

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

BETSY KELLY - ONE SECURITY BENEFIT PLACE, TOPEKA, KS 66636 785-438-3000

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

ANY WRITTEN REQUEST

c Any submission deadlines:

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

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE ATTACHED LIST				244,382
Total ▶ 3a				244,382
b Approved for future payment				
NONE				
Total ▶ 3b				

JSA
9E1491 1 000

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See page 28 of the instructions.)
1 Program service revenue.					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	48	
4 Dividends and interest from securities					
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue. a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				48	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 48

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See page 29 of the instructions.)
	NOT APPLICABLE

JSA
9E1492 1 000

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

			Yes	No
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		NOT APPLICABLE	

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
NOT APPLICABLE		

Sign Here

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 | Date: 5.3.10 | Title: TRUSTEE

Paid Preparer's Use Only

Preparer's signature	Date	Check if self-employed ☐	Preparer's identifying number (See Signature on page 30 of the instructions)
Firm's name (or yours if self-employed), address, and ZIP code		EIN	Phone no.

JSA
9E1493 1 000

SBL Charitable Trust
YEAR END 2009

ORG	City	ST	Contribution	Project
Boys & Girls Club of Topeka	Topeka	KS	$625 00	Supporting
Doorstep, Inc	Topeka	KS	$1,000 00	Supporting
Easter Seals Capper Foundation	Topeka	KS	$300 00	Supporting
Great Overland Station	Topeka	KS	$200 00	Supporting
Greater Topeka Chamber of Commerce	Topeka	KS	$430 00	Supporting
Junior Achievement of Kansas	Topeka	KS	$1,500 00	Supporting
Leadership Kansas	Topeka	KS	$250 00	Supporting
Sheltered Living, Inc	Topeka	KS	$750 00	Supporting
Topeka Civic Theatre & Academy	Topeka	KS	$5,000 00	Supporting
United Way of Greater Topeka	Topeka	KS	$75,000 00	Supporting
YWCA of Topeka	Topeka	KS	$150 00	Supporting
Toastmasters District 22 Conference	Leavenworth	KS	$150 00	Supporting
Living the Dream, Inc	Topeka	KS	$1,350 00	Supporting
Mana de Topeka	Topeka	KS	$2,260 00	Supporting
NAACP Special Contribution Fund NAACP ACT	Baltimore	MD	$2,000 00	Supporting
OLG Fiesta Mexicana	Topeka	KS	$2,375 00	Supporting
Sertoma	Kansas City	MO	$500 00	Supporting
Shawnee County Allied Tribes, Inc	Topeka	KS	$650 00	Supporting
Topeka Aids Project	Topeka	KS	$150 00	Supporting
TurnAround Team Aaron Douglas Art Fair	Topeka	KS	$250 00	Supporting
Unity Council of Topeka	Topeka	KS	$250 00	Supporting
The Links, Inc.	Topeka	KS	$2,500 00	Supporting
American Cancer Society	Topeka	KS	$100 00	Supporting
Celiac Sprue Association	Omaha	NE	$100 00	Supporting
Cottonwood, Inc	Lawrence	KS	$100 00	Supporting
Crown Financial Ministries	Topeka	KS	$100.00	Supporting
Easter Seals Capper Foundation	Topeka	KS	$100 00	Supporting
Easter Seals Capper Foundation	Topeka	KS	$300 00	Supporting
Easter Seals Capper Foundation	Topeka	KS	$300 00	Supporting
Elmont Elementary School	Topeka	KS	$100 00	Educational
Friends of the Topeka Zoo	Topeka	KS	$300 00	Supporting
Helping Hands Humane Society	Topeka	KS	$100 00	Supporting
Helping Hands Humane Society	Topeka	KS	$100 00	Supporting
Helping Hands Humane Society	Topeka	KS	$200 00	Supporting
Helping Hands Humane Society	Topeka	KS	$200 00	Supporting
His Kids Ministries Inc. dba Shiloh Adoptions	Topeka	KS	$300 00	Supporting
Holton Middle School	Holton	KS	$200 00	Educational
Junior Achievement of Kansas	Topeka	KS	$300 00	Supporting
Kansas Children's Service League	Topeka	KS	$200 00	Supporting
Lawrence Arts Center Drama Program	Lawrence	KS	$200 00	Supporting
Let's Help, Inc	Topeka	KS	$200 00	Supporting
Lyman Elementary PTO	Topeka	KS	$300 00	Educational
March of Dimes	Topeka	KS	$300 00	Supporting
National Multiple Sclerosis Society Eastern KS Branch, Mid Americ Chapter	Topeka	KS	$300 00	Supporting
Ronald McDonald House	Topeka	KS	$300.00	Supporting
Topeka Collegiate School	Topeka	KS	$300 00	Educational
Topeka Rescue Mission	Topeka	KS	$300.00	Supporting
Topeka Swim Association	Topeka	KS	$300.00	Supporting
Kansas Big Brothers Big Sisters	Topeka	KS	$1,000.00	Supporting
KTWU-TV	Topeka	KS	$1,500 00	Supporting
Washburn Women's Alliance	Topeka	KS	$1,080 00	Supporting
American Cancer Society	Topeka	KS	$850 00	Supporting
Meals on Wheels	Topeka	KS	$1,000 00	Supporting
Race Against Breast Cancer, Inc	Topeka	SK	$2,500 00	Supporting
Benedictine College	Atchison	KS	$25 00	Educational
Bethany College	Lindsborg	KS	$1,000 00	Educational

SBL Charitable Trust
YEAR END 2009

Boston College	Chestnut Hill	MA	$3,000 00	Educational
Boston College University Advancement	Chestnut Hill	MA	$3,000 00	Educational
Easter Seals Capper Foundation	Topeka	KS	$1,000 00	Supporting
Easter Seals Capper Foundation	Topeka	KS	$1,500 00	Supporting
Fort Hays State University Foundation	Hays	KS	$50 00	Educational
Fort Scott Community College	Fort Scott	KS	$50 00	Educational
Fort Scott Community College Endowment	Fort Scott	KS	$50 00	Educational
Hayden High School	Topeka	KS	$1,000 00	Educational
Holy Trinity Catholic School	Lenexa	KS	$3,000 00	Educational
Kansas State University Foundation	Manhattan	KS	$25 00	Educational
Kansas State University Foundation	Manhattan	KS	$80 00	Educational
Kansas State University Foundation	Manhattan	KS	$100 00	Educational
Kansas State University Foundation	Manhattan	KS	$100 00	Educational
Kansas State University Foundation	Manhattan	KS	$100 00	Educational
Kansas State University Foundation	Manhattan	KS	$125 00	Educational
Kansas State University Foundation	Manhattan	KS	$240 00	Educational
Kansas State University Foundation	Manhattan	KS	$400 00	Educational
Kansas State University Foundation	Manhattan	KS	$500 00	Educational
Kansas State University Foundation	Manhattan	KS	$500 00	Educational
Kansas State University Foundation	Manhattan	KS	$720 00	Educational
Kansas State University Foundation	Manhattan	KS	$1,440.00	Educational
Kansas University Endowment Assn	Lawrence	KS	$30 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$30 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$30 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$30 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$48 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$48 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$48 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$50 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$50 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$50 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$55 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$60 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$72 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$80 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$100 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$125 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$150.00	Educational
Kansas University Endowment Assn	Lawrence	KS	$240.00	Educational
Kansas University Endowment Assn	Lawrence	KS	$400.00	Educational
Kansas University Endowment Assn	Lawrence	KS	$456.00	Educational
Kansas University Endowment Assn	Lawrence	KS	$1,000.00	Educational
Kansas University Endowment Assn	Lawrence	KS	$1,000 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$1,000 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$1,000 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$1,200 00	Educational
Kansas University Endowment Assn	Lawrence	KS	$1,500.00	Educational
KTWU - Washburn Univeristy	Topeka	KS	$75 00	Supporting
KTWU - Washburn University	Topeka	KS	$40 00	Supporting
KTWU - Washburn University	Topeka	KS	$75 00	Supporting
KTWU / Washburn University	Topeka	KS	$50 00	Supporting
KTWU / Washburn University	Topeka	KS	$50 00	Supporting
KTWU / Washburn University	Topeka	KS	$65.00	Supporting
KTWU / Washburn University	Topeka	KS	$70.00	Supporting
Missouri State University Foundation	Springfield	MO	$150 00	Educational
Most Pure Heart of Mary Elementary School	Topeka	KS	$100 00	Educational
Murray State University Foundation	Murray	KY	$3,000 00	Educational
Pembroke Hill School	Kansas City	MO	$50 00	Educational
Pittsburg State University	Pittsburg	KS	$30 00	Educational
Pittsburg State University	Pittsburg	KS	$100 00	Educational
Pittsburg State University	Pittsburg	KS	$100 00	Educational
St John Catholic School	Lawrence	KS	$3,000 00	Educational
St Matthew School	Topeka	KS	$3,000 00	Educational

SBL Charitable Trust
YEAR END 2009

Tennessee Wesleyan College	Athens	Tn	$100 00	Educatıonal
Tennessee Wesleyan College	Athens	TN	$500 00	Educatıonal
Topeka Collegıate School	Topeka	KS	$500 00	Educatıonal
Topeka Collegıate School	Topeka	KS	$500.00	Educatıonal
Topeka Collegıate School	Topeka	KS	$500 00	Educatıonal
Topeka Collegıate School	Topeka	KS	$750 00	Educatıonal
Topeka Collegıate School, Inc	Topeka	KS	$100 00	Educatıonal
Topeka Collegıate School, Inc	Topeka	KS	$500 00	Educatıonal
Topeka Collegıate School, Inc	Topeka	KS	$500 00	Educatıonal
Topeka Collegıate School, Inc	Topeka	KS	$3,000 00	Educatıonal
Topeka Lutheran School Foundatıon	Topeka	KS	$3,000 00	Educatıonal
Topeka Lutheran School Foundatıon, Inc	Topeka	KS	$2,500 00	Educatıonal
Topeka Publıc Schools Foundatıon	Topeka	KS	$50 00	Educatıonal
Topeka Publıc Schools Foundatıon	Topeka	KS	$500 00	Educatıonal
Trınıty College	Hartford	CT	$750 00	Educatıonal
Trustees of Dartmouth College	Hanover	NH	$500 00	Educatıonal
Unıversıty of Central Mıssourı Foundatıon	Warrensburg	MO	$25 00	Educatıonal
Unıversıty of Nebraska Foundatıon	Lıncoln	NE	$448 00	Educatıonal
Unıversıty of Oklahoma Foundatıon, Inc	Norman	OK	$100 00	Educatıonal
Washburn Endowment Assn	Topeka	KS	$25 00	Educatıonal
Washburn Endowment Assn	Topeka	KS	$50 00	Educatıonal
Washburn Endowment Assn	Topeka	KS	$100 00	Educatıonal
Washburn Endowment Assn	Topeka	KS	$100 00	Educatıonal
Washburn Endowment Assn	Topeka	KS	-$48 00	Educatıonal
Washburn Endowment Assn	Topeka	KS	$1,000 00	Educatıonal
Washburn Law School Foundatıon	Topeka	KS	$250 00	Educatıonal
Wichıta State Unıversıty Foundaıton	Wıchıta	KS	$100 00	Educatıonal
CASA of Shawnee County, Inc	Topeka	KS	$15,000 00	Supportıng
Topeka Cıvic Theatre & Academy	Topeka	KS	$20,000 00	Supportıng
Topeka Collegiate School	Topeka	KS	$5,000 00	Educatıonal
Topeka Performıng Arts Center	Topeka	KS	$20,000 00	Supportıng
Washburn Endowment Assn	Topeka	KS	$20,000 00	Educatıonal
			$244,382 00	