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## Return of Private Foundation

OMB No 1545-0052

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

2009

Department of the Treasury  
Internal Revenue Service

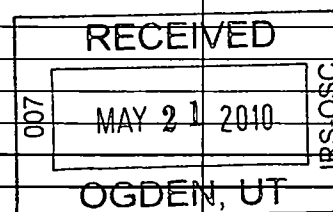
Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

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

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation <b>RUSS &amp; HELEN MEYER CHARITABLE TRUST</b>		A Employer identification number <b>48-6336357</b>
	Number and street (or P.O. box number if mail is not delivered to street address) <b>600 TARA COURT</b>	Room/suite	B Telephone number <b>(316) 634-2071</b>
	City or town, state, and ZIP code <b>WICHITA, KS 67206</b>		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
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			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ <b>1,307,901.</b> (Part I, column (d) must be on cash basis)			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> 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			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	33,069.	33,069.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	174,802.			
	b Gross sales price for all assets on line 6a	204,802.			
	7 Capital gain net income (from Part IV, line 2)		174,802.		
	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	207,871.	207,871.			
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	STMT 2	770.	0.	0.
	c Other professional fees				
	17 Interest				
	18 Taxes	STMT 3	4,545.	0.	0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses				
	24 Total operating and administrative expenses. Add lines 13 through 23		5,315.	0.	0.
	25 Contributions, gifts, grants paid		106,260.		106,260.
26 Total expenses and disbursements. Add lines 24 and 25		111,575.	0.	106,260.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		96,296.			
b Net investment income (if negative, enter -0-)		207,871.			
c Adjusted net income (if negative, enter -0-)			N/A		



SCANNED MAY 25 2010

**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	
<b>Assets</b>	1 Cash - non-interest-bearing	111,526.	237,822.	237,822.	
	2 Savings and temporary cash investments				
	3 Accounts receivable ▶				
	Less: allowance for doubtful accounts ▶				
	4 Pledges receivable ▶				
	Less: allowance for doubtful accounts ▶				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons				
	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 4	291,500.	261,500.	1,070,079.	
	c Investments - corporate bonds				
<b>Liabilities</b>	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)	403,026.	499,322.	1,307,901.	
	17 Accounts payable and accrued expenses				
	18 Grants payable				
<b>Net Assets or Fund Balances</b>	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.			
<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/>	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/>	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	403,026.	499,322.	
		30 Total net assets or fund balances	403,026.	499,322.	
	31 Total liabilities and net assets/fund balances	403,026.	499,322.		

**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	403,026.
2 Enter amount from Part I, line 27a	2	96,296.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	499,322.
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	499,322.

**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.)
<b>1a GENERAL DYNAMICS 3,000 SHARES</b>	<b>P</b>	<b>VARIOUS</b>	<b>12/04/09</b>
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
<b>a 204,802.</b>		<b>30,000.</b>	<b>174,802.</b>
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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	
<b>a</b>			<b>174,802.</b>
b			
c			
d			
e			

<b>2 Capital gain net income or (net capital loss)</b>	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	<b>2</b>	<b>174,802.</b>
<b>3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):</b> If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		<b>3</b>	<b>N/A</b>

**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	233,165.	1,897,641.	.122871
2007	71,390.	2,203,497.	.032399
2006	56,960.	1,936,836.	.029409
2005	56,760.	1,606,082.	.035341
2004	50,060.	1,643,314.	.030463

<b>2 Total of line 1, column (d)</b>	<b>2</b>	<b>.250483</b>
<b>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</b>	<b>3</b>	<b>.050097</b>
<b>4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5</b>	<b>4</b>	<b>1,141,346.</b>
<b>5 Multiply line 4 by line 3</b>	<b>5</b>	<b>57,178.</b>
<b>6 Enter 1% of net investment income (1% of Part I, line 27b)</b>	<b>6</b>	<b>2,079.</b>
<b>7 Add lines 5 and 6</b>	<b>7</b>	<b>59,257.</b>
<b>8 Enter qualifying distributions from Part XII, line 4</b>	<b>8</b>	<b>106,260.</b>

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	2,079.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		3	2,079.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	2,079.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		6a	2,640.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		6b	
6 Credits/Payments:		6c	
a 2009 estimated tax payments and 2008 overpayment credited to 2009		6d	
b Exempt foreign organizations - tax withheld at source		7	2,640.
c Tax paid with application for extension of time to file (Form 8868)		8	
d Backup withholding erroneously withheld		9	
7 Total credits and payments. Add lines 6a through 6d		10	561.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached		11	0.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
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 <u>561.</u> Refunded <u>561.</u>			

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <u>\$ 0.</u> (2) On foundation managers. <u>\$ 0.</u>		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <u>\$ 0.</u>		
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) <u>KS</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ RUSS MEYER Telephone no. ▶ (316) 634-2071  
 Located at ▶ 600 TARA COURT, WICHITA, KS ZIP+4 ▶ 67206

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	<u>N/A</u>	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years ▶ _____ , _____ , _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	<u>N/A</u>	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.)	<u>N/A</u>	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?

☐ Yes ☒ No

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

6b

X

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
RUSS MEYER	TRUSTEE			
600 TARA COURT				
WICHITA, KS 67206	1.00	0.	0.	0.
HELEN MEYER	TRUSTEE			
600 TARA COURT				
WICHITA, KS 67206	1.00	0.	0.	0.

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

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

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

0

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**Part VIII****Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

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

0

**Part IX-A** Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 THERE WERE NO DIRECT CHARITABLE ACTIVITIES - SEE PART XV FOR CHARITABLE CONTRIBUTIONS.	0.
2	
3	
4	

**Part IX-B** Summary of Program-Related Investments

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

	Amount
1 N/A	
2	
3 All other program-related investments. See instructions.	
Total. Add lines 1 through 3	0.

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	1,054,098.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	104,629.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	1,158,727.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	1,158,727.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	17,381.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	1,141,346.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	57,067.

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	57,067.
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	2,079.
<b>b</b>	Income tax for 2009. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	2,079.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	54,988.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	54,988.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	54,988.

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	106,260.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	106,260.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	2,079.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	104,181.

**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 instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				54,988.
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				
c From 2006				
d From 2007				
e From 2008				60,616.
f Total of lines 3a through e	60,616.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$				106,260.
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				54,988.
e Remaining amount distributed out of corpus	51,272.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	111,888.			
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	111,888.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008	60,616.			
e Excess from 2009	51,272.			

N/A

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

☐ 4942(1)(3) or ☐ 4942(1)(5)

- (4) Gross investment income

[illegible]

<b>Part XV</b>	<b>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.)</b>
----------------	--

**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).)

SEE STATEMENT 5

- 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:**

N/A

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

N/A

- c Any submission deadlines:**

N/A

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

N/A

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> Paid during the year <b>DETAIL ATTACHED</b>	NONE	PUBLIC	FURTHER THE CHARITABLE PURPOSES OF THE ORGANIZATIONS	106,260.
<b>Total</b>				▶ 3a 106,260.
<b>b</b> Approved for future payment  NONE				
<b>Total</b>				▶ 3b 0.





FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
BANK OF AMERICA CORPORATION	209.	0.	209.
GENERAL DYNAMICS	23,260.	0.	23,260.
QWEST COMMUNICATIONS	9,600.	0.	9,600.
TOTAL TO FM 990-PF, PART I, LN 4	33,069.	0.	33,069.

FORM 990-PF ACCOUNTING FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	770.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	770.	0.		0.

FORM 990-PF TAXES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INTERNAL REVENUE SERVICE	4,545.	0.		0.
TO FORM 990-PF, PG 1, LN 18	4,545.	0.		0.

FORM 990-PF CORPORATE STOCK STATEMENT 4

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
BANK OF AMERICA	28,000.	78,953.
GENERAL DYNAMICS	126,100.	864,226.
QWEST COMMUNICATIONS	107,400.	126,900.
TOTAL TO FORM 990-PF, PART II, LINE 10B	261,500.	1,070,079.

FORM 990-PF

PART XV - LINE 1A  
LIST OF FOUNDATION MANAGERS

STATEMENT 5

NAME OF MANAGER

RUSS MEYER  
HELEN MEYER



**RUSS AND HELEN MEYER CHARITABLE TRUST**  
**48-6336357**  
**Contributions**  
**Taxable Year Ended December 31, 2009**

<u>PAYEE</u>	<u>AMOUNT</u>
<b>KPTS</b> MAILING ADDRESS: P. O. Box 288 Wichita, KS 67201-0288	<b>\$1,000.00</b>
<b>Quivira Council, Boy Scouts of America</b> MAILING ADDRESS: 1555 East 2 <sup>nd</sup> Street P. O. Box 48166 Wichita, KS 67201	<b>\$ 500.00</b>
<b>Wichita Symphony Society, Inc.</b> MAILING ADDRESS: 225 West Douglas Wichita, KS 67202	<b>\$8,000.00</b>
<b>Kansas Humane Society</b> MAILING ADDRESS: P. O. Box 945 Wichita, KS 67201-0945	<b>\$1,000.00</b>
<b>Boys Hope Girls Hope</b> MAILING ADDRESS: 9625 Garfield Boulevard Garfield Heights, OH 44125	<b>\$ 200.00</b>
<b>The Envision Foundation</b> MAILING ADDRESS: Beyond 20/20 Campaign ATTN: Mary E. Shannon 610 North Main Wichita, KS 67203	<b>\$2,200.00</b>
<b>Arts Partners, Inc.</b> MAILING ADDRESS: 201 North Water, Suite 300 Wichita, KS 67202-1292	<b>\$2,500.00</b>

**RUSS AND HELEN MEYER CHARITABLE TRUST**

**48-6336357**

**Contributions**

**Taxable Year Ended December 31, 2009**

**(Continued)**

<u><b>PAYEE</b></u>	<u><b>AMOUNT</b></u>
<b>The Opportunity Project (TOP)</b>	<b>\$1,000.00</b>
MAILING ADDRESS: c/o Barry L. Downing 1625 North Waterfront Parkway Suite 100 Wichita, KS 67206	
<b>The Desert Community Foundation</b>	<b>\$3,000.00</b>
MAILING ADDRESS: c/o Tradition Golf Club 78-505 Old Avenue 52 La Quinta, CA 92253	
<b>Wichita Art Museum</b>	<b>\$1,000.00</b>
MAILING ADDRESS: 1400 West Museum Boulevard Wichita, KS 67203-3296	
<b>Cerebral Palsy Research Foundation of Kansas, Inc.</b>	<b>\$2,500.00</b>
MAILING ADDRESS: 5111 East 21 <sup>st</sup> Street North P. O. Box 8217 Wichita, KS 67208	
<b>WSU Foundation</b>	<b>\$1,000.00</b>
MAILING ADDRESS: ATTN: Natalie Olmsted 1845 Fairmount, Box 2 Wichita, KS 67260-0002	
<b>Big Brothers Big Sisters</b>	<b>\$ 600.00</b>
MAILING ADDRESS: P. O. Box 48109 Wichita, KS 67201-8109	

**RUSS AND HELEN MEYER CHARITABLE TRUST**

**48-6336357**

**Contributions**

**Taxable Year Ended December 31, 2009**

**(Continued)**

<u><b>PAYEE</b></u>	<u><b>AMOUNT</b></u>
<b>WSU Foundation/Music Associates</b>	<b>\$ 500.00</b>
MAILING ADDRESS: Music Associates, School of Music Wichita State University 1845 Fairmount, Box 53 Wichita, KS 67260-0053	
<b>The Grumpy Old Men (Wichita Symphony donation)</b>	<b>\$1,000.00</b>
MAILING ADDRESS: 800 Lakewood Drive Wichita, KS 67230	
<b>The ALS Association, Keith Worthington Chapter</b>	<b>\$1,000.00</b>
MAILING ADDRESS: c/o Mrs. Whitney Vliet Ward Walk to Defeat ALS 3450 North Rock Road, Suite 211 Wichita, KS 67226	
<b>Wichita Art Museum</b>	<b>\$5,000.00</b>
MAILING ADDRESS: 1400 West Museum Boulevard Wichita, KS 67203-3296	
<b>American Diabetes Association</b>	<b>\$2,500.00</b>
MAILING ADDRESS: 3210 East Douglas Wichita, KS 67208-3309	
<b>Botanica</b>	<b>\$1,500.00</b>
MAILING ADDRESS: 701 Amidon Wichita, KS 67203-3199	
<b>Swingin' Fore A Coz V (Victory in the Valley)</b>	<b>\$ 500.00</b>
MAILING ADDRESS: c/o Cary Cosby Wichita Country Club 8501 East Thirteenth Street Wichita, KS 67206	

**RUSS AND HELEN MEYER CHARITABLE TRUST**  
**48-6336357**  
**Contributions**  
**Taxable Year Ended December 31, 2009**

(Continued)

<u>PAYEE</u>	<u>AMOUNT</u>
<b>Kansas Foodbank Warehouse</b> MAILING ADDRESS: 1919 East Douglas Wichita, KS 67211	<b>\$1,160.00</b>
<b>FUNDamental Learning Center</b> MAILING ADDRESS: 917 South Glendale Wichita, KS 67218	<b>\$1,000.00</b>
<b>WSU Foundation</b> MAILING ADDRESS: 1845 Fairmount Wichita, KS 67260-0151	<b>\$ 500.00</b>
<b>Music Theatre of Wichita</b> MAILING ADDRESS: 225 West Douglas, Suite 202 Wichita, KS 67202	<b>\$ 5,500.00</b>
<b>The AOPA Foundation</b> MAILING ADDRESS: c/o Mr. Craig L. Fuller Aircraft Owners and Pilots Assn. 421 Aviation Way Frederick, MD 21701-4798	<b>\$ 10,000.00</b>
<b>Three Trees, Inc.</b> MAILING ADDRESS: 8100 East 22 <sup>nd</sup> Street North Building 800, Suite 100 Wichita, KS 67226	<b>\$ 2,600.00</b>
<b>The Lord's Diner</b> MAILING ADDRESS: 520 North Broadway Wichita, KS 67214-3504	<b>\$ 1,000.00</b>

**RUSS AND HELEN MEYER CHARITABLE TRUST**  
**48-6336357**  
**Contributions**  
**Taxable Year Ended December 31, 2009**

(Continued)

<u>PAYEE</u>	<u>AMOUNT</u>
<b>The Desert Community Foundation</b>	<b>\$ 500.00</b>
MAILING ADDRESS: c/o Eldorado Country Club 46000 Fairway Drive Indian Wells, CA 92210	
<b>Arts Partners, Inc.</b>	<b>\$ 10,000.00</b>
MAILING ADDRESS: 201 North Water, Suite 300 Wichita, KS 67202-1292	
<b>Education Edge</b>	<b>\$ 10,000.00</b>
MAILING ADDRESS: Wichita Public Schools Grants Office ATTN: Ross Hollander, Chairman 201 North Water Wichita, KS 67202	
<b>Skidmore College</b>	<b>\$ 5,000.00</b>
MAILING ADDRESS: Skidmore College 815 North Broadway Saratoga Springs, NY 12866	
<b>Yale University</b>	<b>\$ 1,000.00</b>
MAILING ADDRESS: Yale Alumni Fund P. O. Box 803 New Haven, CT 06503-0803	
<b>Duke University</b>	<b>\$ 1,000.00</b>
MAILING ADDRESS: Duke Annual Fund Box 90581 Durham, NC 27708-0581	

**RUSS AND HELEN MEYER CHARITABLE TRUST**  
**48-6336357**  
**Contributions**  
**Taxable Year Ended December 31, 2009**

(Continued)

<u>PAYEE</u>	<u>AMOUNT</u>
<b>Experimental Aircraft Association</b> MAILING ADDRESS: EAA Aviation Center P. O. Box 3086 Oshkosh, WI 54903-3086	<b>\$ 10,000.00</b>
<b>Wake Forest University</b> MAILING ADDRESS: P. O. Box 7227 Winston-Salem, NC 27109	<b>\$ 2,000.00</b>
<b>The Lord's Diner</b> MAILING ADDRESS: 520 North Broadway Wichita, KS 67214-3504	<b>\$ 5,000.00</b>
<b>Kansas Society for Crippled Children</b> MAILING ADDRESS: 106 West Douglas, Suite 900 Wichita, KS 67202	<b>\$ 1,000.00</b>
<b>Three Trees, Inc.</b> MAILING ADDRESS: 8100 East 22 <sup>nd</sup> Street North Building 800, Suite 100 Wichita, KS 67226	<b>\$ 1,500.00</b>
<b>Williams College Parents Fund</b> MAILING ADDRESS: Williams College 75 Park Street Williamstown, MA 01267-2141	<b>\$ 1,000.00</b>
<b>TOTAL CONTRIBUTIONS</b>	<b><u>\$106,260.00</u></b>