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: JOSEPH E. & MARJORIE B. JONES FOUNDATION

Number and street (or P O box number if mail is not delivered to street address): 1666 CONNECTICUT AVE NW #200 Room/suite

City or town, state, and ZIP code: WASHINGTON, DC 20009

A Employer identification number: 52-1628951

B Telephone number (see page 10 of the instructions): (202) 797-6720

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 X Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ $ 27,364,483.

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)	50,000.			
	2 Check ▶ ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	4,180.	4,180.		ATCH 1
	4 Dividends and interest from securities	160,361.	160,361.		ATCH 2
	5a Gross rents	3,184,966.	3,184,966.		
	b Net rental income or (loss) 445,401.				
	6a Net gain or (loss) from sale of assets not on line 10	-172,104.			
	b Gross sales price for all assets on line 6a 599,016.				
	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)		-707,668.		ATCH 3
	12 **Total.** Add lines 1 through 11	3,227,403.	2,641,839.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	3,900.	1,100.		2,800.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) ATCH 4	30,226.	20,150.	0.	10,076.
	c Other professional fees (attach schedule) *	32,835.	32,835.		
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions) **	15,759.			
	19 Depreciation (attach schedule) and depletion	388,442.	388,442.		
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) ATCH 7	2,355,700.	1,742,419.		
	24 **Total operating and administrative expenses.** Add lines 13 through 23	2,826,862.	2,184,946.	0.	12,876.
	25 Contributions, gifts, grants paid	1,203,410.			1,203,410.
	26 **Total expenses and disbursements** Add lines 24 and 25	4,030,272.	2,184,946.	0.	1,216,286.
	27 Subtract line 26 from line 12				
	a **Excess of revenue over expenses and disbursements**	-802,869.			
	b **Net investment income** (if negative, enter -0-)		456,893.		
	c **Adjusted net income** (if negative, enter -0-)			-0-	

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing	142,546.	114,966.	114,966.
	2	Savings and temporary cash investments	514,677.	132,357.	132,357.
	3	Accounts receivable ▶ 12,866. Less allowance for doubtful accounts ▶	7,940.	12,866.	12,866.
	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 ATCH 8	87,042.	43,409.	43,409.
	10 a	Investments - U S and state government obligations (attach schedule) **	1,550,634.	1,165,193.	1,237,211.
	b	Investments - corporate stock (attach schedule) ATCH 10	2,312,500.	2,179,511.	2,134,243.
	c	Investments - corporate bonds (attach schedule) ATCH 11	718,953.	969,216.	998,431.
	11	Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	12	Investments - mortgage loans			
	13	Investments - other (attach schedule) ATCH 12	8,056.	8,056.	0.
	14	Land, buildings, and equipment basis ▶ 21,014,231. Less accumulated depreciation (attach schedule) ▶ 7,716,523.	13,674,276.	13,297,708.	ATCH 13 22,691,000.
	15	Other assets (describe ▶)			
	16	Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	19,016,624.	17,923,282.	27,364,483.
Liabilities	17	Accounts payable and accrued expenses	254,168.	45,075.	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)	3,384,531.	3,305,910.	ATCH 14
	22	Other liabilities (describe ▶ ATCH 15)	93,209.	90,450.	
	23	Total liabilities (add lines 17 through 22)	3,731,908.	3,441,435.	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ [X] and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted	15,284,716.	14,481,847.	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ [ ]			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	15,284,716.	14,481,847.	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	19,016,624.	17,923,282.	

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	15,284,716.
2	Enter amount from Part I, line 27a	2	-802,869.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	14,481,847.
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	14,481,847.

**ATCH 9

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	SEE PART IV SCHEDULE			
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 | -163,554.

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	1,112,119.	23,179,049.	0.047979
2007	996,705.	23,479,073.	0.042451
2006	782,294.	19,089,559.	0.040980
2005	740,814.	15,769,420.	0.046978
2004	511,990.	15,948,531.	0.032103

2	**Total** of line 1, column (d)	2	0.210491
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	0.042098
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	24,049,462.
5	Multiply line 4 by line 3	5	1,012,434.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	4,569.
7	Add lines 5 and 6	7	1,017,003.
8	Enter qualifying distributions from Part XII, line 4	8	1,216,286.

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	4,569.
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	4,569.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0.
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	4,569.
6	Credits/Payments		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 6a: 5,712.		
b	Exempt foreign organizations-tax withheld at source — 6b: 0.		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 0.		
d	Backup withholding erroneously withheld — 6d:		
7	Total credits and payments Add lines 6a through 6d	7	5,712.
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	
10	**Overpayment** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	1,143.
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ 1,143. **Refunded** ▶	11	0.

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	X	
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) ▶ ________			
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)*

		Line	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) . . ATCH. 16 ATCH. 17	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 ▶ THE FOUNDATION Telephone no ▶ 202-797-6720

Located at ▶ 1666 CONNECTICUT AVE NW #200 WASHINGTON, DC ZIP + 4 ▶ 20009

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.

			Line	Yes	No
1a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ 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			
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? 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			
b	If "Yes," did it have excess business holdings in 2009 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)*		3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b		X

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

5a During the year did the foundation pay or incur any amount to			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No		
(4) Provide a grant to an organization other than a charitable, etc, organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions)	☐ Yes ☒ No		
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?		5b	
Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ Yes ☒ No		
If "Yes," attach the statement required by Regulations section 53 4945-5(d)			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☐ No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b	
If "Yes" to 6b, file Form 8870			
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No		
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b	X

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
ATTACHMENT 18		3,900.	-0-	-0-

2 Compensation of five highest-paid employees (other than those included on line 1 - see page 23 of the instructions). If none, enter "NONE."

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

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

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

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

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

Total number of others receiving over $50,000 for professional services ▶ NONE

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 N/A	
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 NONE	
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	4,039,127.
b	Average of monthly cash balances	1b	629,056.
c	Fair market value of all other assets (see page 24 of the instructions)	1c	22,747,275.
d	**Total** (add lines 1a, b, and c)	1d	27,415,458.
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	2,999,761.
3	Subtract line 2 from line 1d	3	24,415,697.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	366,235.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	24,049,462.
6	**Minimum investment return.** Enter 5% of line 5	6	1,202,473.

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	1,202,473.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	4,569.		
b	Income tax for 2009 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	4,569.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	1,197,904.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	1,197,904.
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	1,197,904.

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	1,216,286.
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	0.
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	0.
b	Cash distribution test (attach the required schedule)	3b	0.
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,216,286.
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	4,569.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	1,211,717.

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					1,197,904.
2 Undistributed income, if any, as of the end of 2009					
a Enter amount for 2008 only				1,139,994.	
b Total for prior years 20 07 ,20 06 ,20 05					
3 Excess distributions carryover, if any, to 2009					
a From 2004					
b From 2005					
c From 2006					
d From 2007					
e From 2008	0.				
f **Total** of lines 3a through e		0.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ $ 1,216,286.					
a Applied to 2008, but not more than line 2a				1,139,994.	
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					76,292.
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).)*		0.			0.
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		0.			
b Prior years' undistributed income Subtract line 4b from line 2b					
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed					
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions					
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions					
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010					1,121,612.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)					
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)					
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a		0.			
10 Analysis of line 9					
a Excess from 2005					
b Excess from 2006					
c Excess from 2007					
d Excess from 2008					
e Excess from 2009	0.				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

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

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

1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

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

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

ATTACHMENT 19

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

COMPLETE PACKAGE WITH INSTRUCTIONS AVAILABLE UPON REQUEST

c Any submission deadlines

MAY 31 FOR CURRENT CALENDAR YEAR.

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

NONE - PREFERENCE GIVEN TO WASHINGTON, DC AREA ORGANIZATIONS.

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*				
ATTACHMENT 20				
Total . . . . . ▶ **3a**				1,203,410.
b *Approved for future payment*				
Total . . . . . ▶ **3b**				

Form **990-PF** (2009)

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	(b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	(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	4,180.	
4 Dividends and interest from securities			14	160,361.	
5 Net rental income or (loss) from real estate					
a Debt-financed property	531120	98,964.			
b Not debt-financed property			16	346,437.	
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		
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)		98,964.		510,978.	

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 609,942.

(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

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
	N/A		N/A

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

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] 11/15/2010 ▶ PRES/CEO
Signature of officer or trustee Date Title

Paid Preparer's Use Only

Preparer's signature ▶ [signature]	Date 9/13/2010	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 ▶	CBIZ MHM, LLC 3 BETHESDA METRO CENTER, SUITE 600 BETHESDA, MD 20814	EIN ▶ 34-1862269 Phone no 301-951-3636	

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, 990-EZ, or 990-PF.**

OMB No 1545-0047

2009

Name of the organization
JOSEPH E. & MARJORIE B. JONES FOUNDATION

Employer identification number
52-1628951

Organization type (check one)

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☐ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☒ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor Complete Parts I and II

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc , purposes, but these contributions did not aggregate to more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc , contributions of $5,000 or more during the year . . . . ▶ $ ____________

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization JOSEPH E. & MARJORIE B. JONES FOUNDATION

Employer identification number 52-1628951

Part I **Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	UNITED INSURANCE SERVICE, INC 1666 CONN AVE, NW WASHINGTON, DC 20009	$ 50,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
BB&T - BUILDING	2,630.	2,630.
BB&T - FOUNDATION	1,550.	1,550.
TOTAL	4,180.	4,180.

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
RBC WEALTH MANAGEMENT		160,361.	160,361.
	TOTAL	160,361.	160,361.

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		SALE OF ASSETS, DAIN INVESTMENT					05/16/2008	03/20/2009
12,563.		37,800.					-25,237.	
		LONG-TERM, RBC WEALTH MGMT					VARIOUS	VARIOUS
568,855.		711,270.					-142,415.	
		OTHER STOCK SETTLEMENTS					VARIOUS	VARIOUS
4,098.		0.					4,098.	
TOTAL GAIN(LOSS)							-163,554.	

9E7000 1 000

RENT AND ROYALTY INCOME

Taxpayer's Name	Identifying Number
JOSEPH E. & MARJORIE B. JONES FOUNDATION	52-1628951

DESCRIPTION OF PROPERTY

OFFICE BUILDING WASHINGTON, DC

[ ] Yes [ ] No Did you actively participate in the operation of the activity during the tax year?

REAL RENTAL INCOME			
OTHER INCOME			
GROSS RENTS		3,184,966.	
TOTAL GROSS INCOME			3,184,966.
OTHER EXPENSES:			
SEE ATTACHMENT			
DEPRECIATION (SHOWN BELOW)			
LESS: Beneficiary's Portion			
AMORTIZATION			
LESS: Beneficiary's Portion			
DEPLETION			
LESS: Beneficiary's Portion			
TOTAL EXPENSES			2,351,123.
TOTAL RENT OR ROYALTY INCOME (LOSS)			833,843.
Less Amount to			
Rent or Royalty			
Depreciation			
Depletion			
Investment Interest Expense			
Other Expenses			
Net Income (Loss) to Others			
Net Rent or Royalty Income (Loss)			833,843.
Deductible Rental Loss (if Applicable)			

SCHEDULE FOR DEPRECIATION CLAIMED

(a) Description of property	(b) Cost or unadjusted basis	(c) Date acquired	(d) ACRS des	(e) Bus %	(f) Basis for depreciation	(g) Depreciation in prior years	(h) Method	(i) Life or rate	(j) Depreciation for this year
Totals									

JSA

SUPPLEMENT TO RENT AND ROYALTY SCHEDULE

OTHER INCOME

GROSS RENTS	3,184,966.
	3,184,966.

OTHER DEDUCTIONS

AUTO AND TRAVEL	979.
CLEANING	49,045.
INSURANCE	72,395.
LEGAL AND OTHER PROFESSIONAL FEES	80,363.
MORTGAGE INTEREST PAID TO FINANCIAL INSTITUTIONS	97,983.
NONINVESTMENT INTEREST	17,354.
REPAIRS	2,160.
TAXES	413,783.
UTILITIES	178,157.
WAGES	565,717.
EMPLOYEE BENEFITS	104,089.
OFFICE AND MEETING EXPENSES	5,637.
TELEPHONE	12,697.
CONTRACT SERVICES	250,734.
REPRODUCTION	5,532.
DC FRANCHISE TAX	21,215.
MISCELLANEOUS TAX AND LICENSES	1,668.
MANAGEMENT FEES AND RENT ABATEMENT	221,218.
PAYROLL TAXES	49,665.
AMORTIZATION	121,725.
POSTAGE	1,161.
BANK SERVICE CHARGES	1,301.
OUTSIDE LABOR	45,388.
LOAN FEES	3,750.
MEETINGS AND CONFERENCES	2,731.
COMPUTER EXPENSE	22,459.
DUES AND SUBSCRIPTIONS	2,217.
	2,351,123.

RENT AND ROYALTY SUMMARY

PROPERTY	TOTAL INCOME	DEPLETION/ DEPRECIATION	OTHER EXPENSES	ALLOWABLE NET INCOME
OFFICE BUILDING WASH	3,184,966.		2,351,123.	833,843.
TOTALS	3,184,966.		2,351,123.	833,843.

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
LESS:RENTAL INCOME REPORTED ON 990-T		-707,668.
TOTALS		-707,668.

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
ACCOUNTING FEES		30,226.	20,150.		10,076.
	TOTALS	30,226.	20,150.	0.	10,076.

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
INVESTMENT ADVISORY FEES	32,835.	32,835.
TOTALS	32,835.	32,835.

FORM 990PF, PART I - TAXES

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS
FEDERAL INCOME TAX		15,759.
	TOTALS	15,759.

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
RENT AND ROYALTY EXPENSES	2,351,123.	
DUES	748.	
INSURANCE	3,825.	
OFFICE SUPPLIES	4.	
LESS:EXPENSE REPORTED ON 990-T	0.	-608,704.
TOTAL RENTAL EXPENSES		2,351,123.
TOTALS	2,355,700.	1,742,419.

JOSEPH E. & MARJORIE B. JONES FOUNDATION 52-1628951

FORM 990PF, PART II - PREPAID EXPENSES AND DEFERRED CHARGES

ATTACHMENT 8

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
PREPAID INCOME TAXES	35,200.	35,200.
OTHER PREPAID EXPENSES	8,209.	8,209.
TOTALS	43,409.	43,409.

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

ATTACHMENT 9

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
US TREASURY AND AGENCY BONDS	1,165,193.	1,237,211.
US OBLIGATIONS TOTAL	1,165,193.	1,237,211.

JOSEPH E. & MARJORIE B. JONES FOUNDATION 52-1628951

FORM 990PF, PART II - CORPORATE STOCK

ATTACHMENT 10

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
CORPORATE STOCKS	2,179,511.	2,134,243.
TOTALS	2,179,511.	2,134,243.

FORM 990PF, PART II - CORPORATE BONDS

ATTACHMENT 11

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
CORPORATE BONDS	969,216.	998,431.
TOTALS	969,216.	998,431.

JOSEPH E. & MARJORIE B. JONES FOUNDATION 52-1628951

FORM 990PF, PART II - OTHER INVESTMENTS

ATTACHMENT 12

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
ART WORK	8,056.	0.
TOTALS	8,056.	0.

LAND, BUILDINGS, EQUIPMENT NOT HELD FOR INVESTMENT

ATTACHMENT 13

ASSET DESCRIPTION	METHOD/ CLASS	FIXED ASSET DETAIL: BEGINNING BALANCE	ADDITIONS	DISPOSALS	ENDING BALANCE	ACCUMULATED DEPRECIATION DETAIL: BEGINNING BALANCE	ADDITIONS	DISPOSALS	ENDING BALANCE
LEASE COMM-WMG	SL	5,222.		5,222		1,392.	3,830	5,222	
LEASE COMM-NARC	SL	89,468			89,468	17,148	8,858		26,006.
LEASE COMM-BENNETN	SL	111,434			111,434	67,477	11,143		78,620
LEASE COMM-EGYPT	SL	15,812.			15,812	9,486	1,581		11,067
LEASE COMM-LTR	SL	53,813			53,813	29,239	6,727		35,966
LEASE COMM-SETTE	SL	81,194			81,194	54,128	7,588		61,716
LEASE COMM-LD & E	SL	21,241.		21,241		14,160	7,080.	21,240.	
LEASE COMM-ARC	SL	387,410			387,410	77,482.	38,741		116,223
LHI-ARC	M15	428,030			428,030	42,803	28,550		71,353
LHI-SWH	SL	59,424			59,424	22,865	1,524.		24,389.
LHI-EDLOW	SL	107,052			107,052	50,880	2,745		53,625.
LHI-SWH	SL	11,954			11,954	1,992	797		2,789
LHI-NARC	M15	37,889			37,889	3,789.	2,527		6,316
LHI-BENNETTON	SL	252,800			252,800	38,622	6,482		45,104
LHI-EGYPT	M39	21,377			21,377	1,244	274		1,518
LHI-LTSR	M39	135,545			135,545	7,892	1,738		9,630
LHI-SETTE	M39	157,550			157,550	9,173	2,020		11,193
JET WASHER	M7	2,152		2,152		2,152.	0	2,152	

LAND, BUILDINGS, EQUIPMENT NOT HELD FOR INVESTMENT

ATTACHMENT 13 (CONT'D)

		FIXED ASSET DETAIL				ACCUMULATED DEPRECIATION DETAIL			
ASSET DESCRIPTION	METHOD/ CLASS	BEGINNING BALANCE	ADDITIONS	DISPOSALS	ENDING BALANCE	BEGINNING BALANCE	ADDITIONS	DISPOSALS	ENDING BALANCE
PHONE SYSTEM	M7	2,724		2,724		2,724.		2,724	
SNOW BLOWER	M7	1,729		1,729.		1,729		1,729	
EMERGENCY GENERATR	M7	9,331			9,331	9,331.			9,331.
CASH REGISTER	M7	639.			639.	639			639
SEWER EJECTORS	M7	9,543			9,543	9,543			9,543
SEWER EJECTORS	M7	3,720.			3,720	3,720			3,720
TYPEWRITER	SL	423		423		423		423	
COMPTR MONTR LOBBY	M5	522			522	246	15		261
DELL LAPTOP-HWH	M5	4,597			4,597.	2,166.	132		2,298
DIRECTORY	M7	4,824			4,824	1,874.	215		2,089
LOBBY DESK	M7	2,200.			2,200	854.	98		952
GARAGE DOOR	M7	14,859			14,859	5,771	663		6,434
LINCOLN WELDER	M7	2,130.			2,130	826	373.		1,199
SONY VAIO-2	M5	5,932		5,932		3,084		3,084	
SONY VAIO-KDL	M5	3,342		3,342.		1,737		1,737.	
NEW CONSTRUCTION	SL	2,551,150			2,551,150	324,344	65,414		389,758
PUBLC AREA RESTRTN	SL	100,153			100,153	9,095	2,568		11,663
BLDG NEW-SPRINKLER	SL	115,785			115,785.	5,443.	2,969.		8,412.

LAND, BUILDINGS, EQUIPMENT NOT HELD FOR INVESTMENT

ATTACHMENT 13 (CONT'D)

		FIXED ASSET DETAIL				ACCUMULATED DEPRECIATION DETAIL			
ASSET DESCRIPTION	METHOD/ CLASS	BEGINNING BALANCE	ADDITIONS	DISPOSALS	ENDING BALANCE	BEGINNING BALANCE	ADDITIONS	DISPOSALS	ENDING BALANCE
BUILDING COMPONENT	M7	29,770			29,770.	11,564.	1,328.		12,892
ADDL754 BASIS-BLDG	SL	3,965,871			3,965,871	2,180,276	125,901		2,306,177
ADDL VALUE-BLDG	SL	2,877,101			2,877,101	1,655,543	91,337		1,746,880
VOLVO 2004	SL	27,730		27,730		8,319	924.	9,243	
BUILDING REMAINDER	SL	2,019,988			2,019,988.	2,019,988.			2,019,988
WATER TOWER-COILS	SL	38,919			38,919	26,825	1,236		28,061
ROOF	SL	72,000			72,000	48,768.	2,286		51,054.
BLDG IMPRVMNT-1995	SL	38,103.			38,103	12,213.	977.		13,190
ELECTRIC UPGRADE	SL	51,828			51,828	17,941	1,329		19,270
FIRE ALARM	SL	33,143			33,143.	11,475	850		12,325
LIGHT REPLACEMENT	SL	73,216			73,216.	25,340.	1,877.		27,217.
COOLING TOWER	SL	12,000.			12,000	3,760.	308.		4,068
SUN BLOCKING FILM	SL	10,125			10,125	3,153.	260.		3,413
COOLING TOWER	SL	27,400			27,400	8,516	703		9,219
LAND	L	6,181,649			6,181,649				
3RD/4TH FLRSPRINKL	M39	56,810			56,810	0	1,457		1,457.
ELEVATOR DOOR RECL	M39	19,457			19,457.	479	499		978
SECURITY CAMERAS	M5	16,850			16,850	843	1,685		2,528

LAND, BUILDINGS, EQUIPMENT NOT HELD FOR INVESTMENT

ATTACHMENT 13 (CONT'D)

ASSET DESCRIPTION	METHOD/ CLASS	FIXED ASSET DETAIL BEGINNING BALANCE	ADDITIONS	DISPOSALS	ENDING BALANCE	ACCUMULATED DEPRECIATION DETAIL BEGINNING BALANCE	ADDITIONS	DISPOSALS	ENDING BALANCE
WINDOW GRILLS	M39	8,973			8,973	125.	230		355.
WINDOW BLINDS	M7	41,111			41,111	1,468.	2,937		4,405
EMERGENCY EVAC CHA	M7	3,685			3,685.	132	263		395
LHI-ARC	M15	46,188			46,188	769.	1,540		2,309
LHI-NARC	M15	11,040.			11,040	184.	368		552
LHI-NARC	M15	10,325.			10,325	172	344		516
LHI-SWH	M15	15,027			15,027	250	501		751.
LHI-WOLA	M15	175,500			175,500.	2,922.	5,853		8,775
LHI-WOLA	M15	4,523.			4,523	75	151		226.
LHI-FOUNDATION	M39	10,205			10,205	251	262		513
LEASE COMM-SWH	SL	46,618.			46,618	9,324	9,324.		18,648
LEASE COMM-WOLA	SL	182,978			182,978	17,426	18,298		35,724
WINDOW BLINDS	M7	7,976			7,976.	285	570		855
SPRINKLER	SL		56,261		56,261				
APPLE MAC	SL		3,270		3,270		286		286
APPLE-MAC FOR SHOPA	SL		633		633		24		24
VACUUM CLEANER	SL		2,148		2,148		19.		19.
CARPET CLEANER	SL		1,949		1,949.		17		17.

LAND, BUILDINGS, EQUIPMENT NOT HELD FOR INVESTMENT

ATTACHMENT 13 (CONT'D)

		FIXED ASSET DETAIL				ACCUMULATED DEPRECIATION DETAIL			
ASSET DESCRIPTION	METHOD/ CLASS	BEGINNING BALANCE	ADDITIONS	DISPOSALS	ENDING BALANCE	BEGINNING BALANCE	ADDITIONS	DISPOSALS	ENDING BALANCE
APPLE - MAC	SL		635.		635		8.		8
LHI- EDLOW	SL		26,484		26,484		110		110.
LHI - SWH	SL		8,422.		8,422		176		176
LEASE COMM- EDLOW	SL		50,494.		50,494		8,416		8,416
LEASE COMM - SWH	SL		5,351.		5,351		139		139.
LEASE COMM LD&E			3,280		3,280		0		0
TOTALS		20929079			21017511	6,903,859			7,343,750

FORM 990PF, PART II - MORTGAGES AND OTHER NOTES PAYABLE

LENDER: BB&T BANK
ORIGINAL AMOUNT: 3,000,000.
INTEREST RATE: 3.500000
DATE OF NOTE: 01/15/2009
MATURITY DATE: 01/24/2011
REPAYMENT TERMS: UPON MATURITY
SECURITY PROVIDED: ASSETS
PURPOSE OF LOAN: WORKING CAPITAL

BEGINNING BALANCE DUE	2,999,761.
ENDING BALANCE DUE	2,999,761.

LENDER: UNITED INSURANCE SERVICE
ORIGINAL AMOUNT: 757,000.
INTEREST RATE: 4.750000
DATE OF NOTE: 05/20/2003
MATURITY DATE: 05/20/2013
REPAYMENT TERMS: SEMIANNUAL PAYMENTS OF 47,988
PURPOSE OF LOAN: INSTALLMENT NOTE

BEGINNING BALANCE DUE	384,770.
ENDING BALANCE DUE	306,149.

TOTAL BEGINNING MORTGAGES AND OTHER NOTES PAYABLE	3,384,531.
TOTAL ENDING MORTGAGES AND OTHER NOTES PAYABLE	3,305,910.

FORM 990PF, PART II - OTHER LIABILITIES

ATTACHMENT 15

DESCRIPTION	ENDING BOOK VALUE
SECURITY DEPOSITS	90,450.
TOTALS	90,450.

FORM 990PF, PART VII-A, LINE 11A-TRANSFERS FROM CONT. ENT. STATEMENT

CONTROLLED ENTITY'S NAME: UNITED INSURANCE SERVICE, INC
CONTROLLED ENTITY'S ADDRESS: 1666 CONNECTICUT AVE, NW SUITE 200
CITY, STATE & ZIP: WASHINGTON, DC 20009
EIN: 53-0218892
TRANSFER AMOUNT: 50,000.
EXPLANATION OF TRANSFER FROM CONTROLLED ENTITY:
CONTRIBUTION OF $50,000

FORM 990PF, PART VII-A, LINE 11A-TRANSFERS TO CONT. ENT. STATEMENT

CONTROLLED ENTITY'S NAME: UNITED INSURANCE SERVICE, INC
CONTROLLED ENTITY'S ADDRESS: 1666 CONNECTICUT AVE, NW SUITE 200
CITY, STATE & ZIP: WASHINGTON, DC 20009
EIN: 53-0218892
TRANSFER AMOUNT: 95,975.
EXPLANATION OF TRANSFER TO CONTROLLED ENTITY:
INSTALLMENT PAYMENT FOR PARTNERSHIP INTEREST

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION
HARRIS W. HAVARD 1666 CONNECTICUT AVE NW #200 WASHINGTON, DC 20009	CHAIRMAN 20.00	800.

MR. HAVARD RECEIVED $800 AS BOARD FEES. HE RECEIVED A SALARY OF $197,316 AND BENEFITS OF $6,668, WHICH ARE REPORTED AS RENTAL EXPENSES, FOR SERVICES TO 1666 CONNECTICUT AVENUE LLC, A LIMITED LIABILITY COMPANY OWNED BY THE FOUNDATION.

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION
JOYCE HAVARD 1666 CONNECTICUT AVE NW #200 WASHINGTON, DC 20009	PRESIDENT 40.00	800.

MS. HAVARD RECEIVED $800 AS BOARD FEES. SHE RECEIVED $127,160 IN SALARY AND $20,350 IN BENEFITS, WHICH ARE REPORTED AS RENTAL EXPENSES, FOR SERVICES TO 1666 CONNECTICUT AVENUE LLC, A LIMITED LIABILITY COMPANY OWNED BY THE FOUNDATION.

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION
MARY J. HAVARD 1666 CONNECTICUT AVE NW #200 WASHINGTON, DC 20009	DIRECTOR 2.00	500.

COMPENSATION CONSISTS OF BOARD FEES.

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION
STEPHANIE HAVARD 1666 CONNECTICUT AVE NW #200 WASHINGTON, DC 20009	SECRETARY 2.00	500.

COMPENSATION CONSISTS OF BOARD FEES.

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION
DONALD HAVARD 1666 CONNECTICUT AVE NW #200 WASHINGTON, DC 20009 COMPENSATION CONSISTS OF BOARD FEES.	DIRECTOR 2.00	800.
JOHN MARVIN JONES 1666 CONNECTICUT AVE NW #200 WASHINGTON, DC 20009 MR. JONES RECEIVED $500 AS BOARD FEES. HIS FIRM, JMJ & ASSOCIATES, LLC, RECEIVED $34,214 AS LEASING COMMISSIONS FROM 1666 CONNECTICUT AVENUE, LLC, A RENTAL ENTITY OWNED BY THE FOUNDATION. AMORTIZATION OF THE COMMISSIONS ARE BEING REPORTED AS RENTAL EXPENSES ON THE FOUNDATION'S RETURN.	TREASURER 8.00	500.
	GRAND TOTALS	3,900.

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

JOYCE HAVARD
1666 CONNECTICUT AVENUE, NW
WASHINGTON, DC 20009
202-797-6720

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 20

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ACADEMY OF HOPE 601 EDGEWOOD STREET, NE, SUITE 25 WASHINGTON, DC 20017	N/A PUBLIC CHARITY	GENERAL SUPPORT FOR ADULT EDUCATION AND JOB TRAINING PROGRAM	45,000
AMERICA'S VETDOGS 371 EAST JERICHO TURNPIKE SMITHTOWN, NY 11787-2976	NONE PUBLIC CHARITY	BREEDING/TRAINING DOGS FOR WOUNDED VETERANS	50,000.
BETHESDA-CHEVY CHASE RESCUE SQUAD 5020 BATTERY LANE BETHESDA, MD 20814	NONE PUBLIC CHARITY	LIFEPAK DEFIBRILLATOR/MONITOR	35,000.
BREAD FOR THE CITY 1525 SEVENTH STREET, NW WASHINGTON, DC 20001	NONE PUBLIC CHARITY	GENERAL SUPPORT FOR MEAL & HEALTH SERVICES,	60,000.
CAMP ATTAWAY, INC 8640 GUILFORD ROAD SUITE 220 COLUMBIA, MD 21046	NONE PUBLIC CHARITY	CHILDREN WITH SPECIAL NEEDS SUMMER CAMP	35,000
CHESAPEAKE BAY FOUNDATION PHILIP MERRIL ENVIRONMENTAL CENTER 6 HERNDON AVENUE ANNAPOLIS, MD 21403	NONE PUBLIC CHARITY	MARYLAND SCHOOLS EDUCATION PROJECT	80,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 20 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
CHI CENTERS, INC 10501 NEW HAMPSHIRE AVENUE SILVER SPRING, MD 20903	NONE PUBLIC CHARITY	1-2-3 SPEAK COMMUNICATION PROJECT--50,000, WORKSHOP EXPANSION--60,000	110,000
DOWNTOWN CLUSTER OF CONGREGATIONS 1313 NEW YORK AVENUE, NW WASHINGTON, DC 20005	NONE PUBLIC CHARITY	SUPPORT FOR HOMELESS SERVICES UNIT	75,000
FRIENDS OF FORT DUPONT ICE ARENA 1313 NEW YORK AVENUE, NW WASHINGTON, DC 20005	NONE PUBLIC CHARITY	SUPPORT SCHOOLS SKATE FOR FITNESS--45,000, LIFE SAFETY IMPROVEMENTS--30,000	75,000
GEORGETOWN UNIVERSITY HOSPITAL KIDS MOBILE MEDICAL CLINIC 3800 RESERVOIR ROAD NW, 2PHC WASHINGTON, DC 20007	NONE PUBLIC CHARITY	SUPPORT FOR KIDS MOBILE CLINIC--JONES RESIDENT FELLOW--150,000, KIDS MOBILE CLINIC--JONES COMMUN ED FELLOW--50,000	200,000
GEORGETOWN UNIVERSITY MEDICAL CENTER LOMBARDI COMPREHENSIVE CANCER CENTER 3970 RESERVOIR ROAD, NW, RESEARCH BLDG E501 WASHINGTON, DC 20007	NONE PUBLIC CHARITY	SUPPORT FOR LOMBARDI CANCER CENTER--ARTS/HUMANITIES	40,000
HIGHER ACHIEVEMENT PROGRAM 317 8TH STREET, NE WASHINGTON, DC 20002	NONE PUBLIC CHARITY	SUPPORT FOR PROGRAM LAUNCHING MOTIVATED YOUTH	40,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 20 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
LEVINE SCHOOL OF MUSIC 317 8TH STREET WASHINGTON, DC 20002	NONE PUBLIC CHARITY	SUPPORT FOR THEARC MUSIC PROGRAM ENDOWMENT	110,000
IONA SENIOR SERVICES 4125 ALBEMARLE STREET, NW WASHINGTON, DC 20016	NONE PUBLIC CHARITY	CARE MANAGEMENT/COUNSELING FOR LOW INCOME	20,000
MARY'S CENTER FOR MATERNAL AND CHILD CLINIC 2333 ONTARIO ROAD, NW WASHINGTON, DC 20009	NONE PUBLIC CHARITY	SUPPORT TEEN PROGRAM	60,000
THE READING CONNECTION 2009 N 14TH STREET #307 ARLINGTON, VA 22201	NONE PUBLIC CHARITY	SUPPORT READ-ALOUD AND PARENT WORKSHOPS	25,000
STRIVE DC, INC 715 I STREET, NE WASHINGTON, DC 20002	NONE PUBLIC CHARITY	SUPPORT JOB TRAINING/PLACEMENT PROGRAM	60,000
WILMER EYE INSTITUTE@JOHNS HOPKINS LIONS VISION CT 600 N WOLFE STREET, WILMER 112 BALTIMORE, MD 21287	NONE PUBLIC CHARITY	SUPPORT FOR LIONS VISION CENTER	80,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 20 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
MISCELLANEOUS CONTRIBUTIONS VARIOUS	NONE PUBLIC CHARITIES	MISCELLANEOUS SMALL CONTRIBUTIONS	3,410
		TOTAL CONTRIBUTIONS PAID	1,203,410

SCHEDULE D
(Form 1041)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

▶ Attach to Form 1041, Form 5227, or Form 990-T. See the instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).

OMB No 1545-0092

2009

Name of estate or trust: JOSEPH E. & MARJORIE B. JONES FOUNDATION

Employer identification number: 52-1628951

Note: *Form 5227 filers need to complete **only** Parts I and II*

Part I — Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a					

b	Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	-25,237.
2	Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3	Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4	Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2008 Capital Loss Carryover Worksheet	4	( )
5	**Net short-term gain or (loss).** Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back ▶	5	-25,237.

Part II — Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a					

b	Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	-138,317.
7	Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8	Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	
9	Capital gain distributions	9	
10	Gain from Form 4797, Part I	10	
11	Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2008 Capital Loss Carryover Worksheet	11	( )
12	**Net long-term gain or (loss).** Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back ▶	12	-138,317.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041. **Schedule D (Form 1041) 2009**

Part III Summary of Parts I and II

Caution: *Read the instructions before completing this part.*

			(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
13	**Net short-term gain or (loss)**	13			-25,237.
14	**Net long-term gain or (loss):**				
a	Total for year	14a			-138,317.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht)	14b			
c	28% rate gain	14c			
15	**Total net gain or (loss).** Combine lines 13 and 14a ▶	15			-163,554.

Note: *If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a) If lines 14a and 15, column (2), are net gains, go to Part V, and* ***do not*** *complete Part IV If line 15, column (3), is a net loss, complete Part IV and the* ***Capital Loss Carryover Worksheet,*** *as necessary*

Part IV Capital Loss Limitation

16 Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the **smaller** of
a The loss on line 15, column (3) **or** b $3,000 . . . . . 16 (3,000)

Note: *If the loss on line 15, column (3), is more than $3,000,* ***or*** *if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the* ***Capital Loss Carryover Worksheet*** *on page 7 of the instructions to figure your capital loss carryover*

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), **and** Form 1041, line 22, is more than zero

Caution: *Skip this part and complete the worksheet on page 8 of the instructions if*

- *Either line 14b, col (2) or line 14c, col (2) is more than zero, or*
- *Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero*

Form 990-T trusts. Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, **and** Form 990-T, line 34, is more than zero Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col (2) or line 14c, col (2) is more than zero

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)		17		
18	Enter the **smaller** of line 14a or 15 in column (2) but not less than zero	18			
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19			
20	Add lines 18 and 19	20			
21	If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0- ▶	21			
22	Subtract line 21 from line 20 If zero or less, enter -0-		22		
23	Subtract line 22 from line 17 If zero or less, enter -0-		23		
24	Enter the **smaller** of the amount on line 17 or $2,300		24		
25	Is the amount on line 23 equal to or more than the amount on line 24? ☐ **Yes.** Skip lines 25 and 26, go to line 27 and check the "No" box ☐ **No.** Enter the amount from line 23		25		
26	Subtract line 25 from line 24		26		
27	Are the amounts on lines 22 and 26 the same? ☐ **Yes.** Skip lines 27 thru 30, go to line 31 ☐ **No.** Enter the **smaller** of line 17 or line 22		27		
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)		28		
29	Subtract line 28 from line 27		29		
30	Multiply line 29 by 15% (.15)			30	
31	Figure the tax on the amount on line 23 Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)			31	
32	Add lines 30 and 31			32	
33	Figure the tax on the amount on line 17 Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)			33	
34	**Tax on all taxable income.** Enter the **smaller** of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)			34	

SCHEDULE D-1
(Form 1041)

Department of the Treasury
Internal Revenue Service

Continuation Sheet for Schedule D (Form 1041)

▶ See instructions for Schedule D (Form 1041).
▶ Attach to Schedule D to list additional transactions for lines 1a and 6a.

OMB No 1545-0092

2009

Name of estate or trust
JOSEPH E. & MARJORIE B. JONES FOUNDATION

Employer identification number
52-1628951

Part I **Short-Term Capital Gains and Losses - Assets Held One Year or Less**

	(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
1a	SALE OF ASSETS, DAIN INVESTMENT	05/16/2008	03/20/2009	12,563.	37,800.	-25,237.

1b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 1b . . . . -25,237.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041. **Schedule D-1 (Form 1041) 2009**

JSA
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Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side | **Employer identification number**

Part II **Long-Term Capital Gains and Losses - Assets Held More Than One Year**

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a LONG-TERM, RBC WEALTH MGMT	VARIOUS	VARIOUS	568,855.	711,270.	-142,415.
OTHER STOCK SETTLEMENTS	VARIOUS	VARIOUS	4,098.	0.	4,098.

6b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 6b . . . . -138,317.

JOSEPH E. & MARJORIE B. JONES FOUNDATION

52-1628951

ATTACHMENT 21

Supplement to Form 4797 Part I Detail

Description	Date Acquired	Date Sold	Gross Sales Price	Depreciation Allowed or Allowable	Cost or Other Basis	Gain or (Loss) for entire year
RENTAL PROPERTY	VARIOUS	VARIOUS	13,500.	36,195.	58,245.	-8,550.
Totals						