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50rm 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

Fo	r ca	lendar	year 2009,	or t	ax year begin	ning				, and endi		·	_	, 20
G	Che	ck all t	that apply	\perp	Initial return			Initial return	of a former p	oublic char	ıty	L	J Fınal re	turn
					Amended re	eturn		Addre	ss change		N	lame change		
			Name of fou	ındal	tion							A Employer identific	cation numl	per
U	se th	ne IRS	THE HERS	102	I-STIRMAN	FAMI	LY							
	lab	el.	FOUNDAT:	ION	, INC.							52-	227987	9
C	ther	wise,	Number and	stre	et (or PO box n	umber if	mail is not	delivered to stree	t address)	Room/su	ıte	B Telephone number (see	page 10 of the	nstructions)
	pri		1							:				
_	or ty		24601 BI	EVE	RLY ROAL)						(30	1) 229	-7009
		pecific ctions.	City or town	, sta	te, and ZIP code							C If exemption applica pending, check here	tion is	
"	stru	ctions.	1									D 1 Foreign organizat		re ►
			ST MICH	AEI	S, MD 216	663						2 Foreign organiza		
Н	Che	ck tvp	e of organiza	ation	X Sectio	n 501(d	c)(3) exe	mpt private	foundation			85% test, check h	ere and attach	
Γ	_		•		empt charitable	•	$\overline{}$	ier taxable pr		tion		,		
Ė		-	et value of all		sets at end	Accou		ethod X C				E If private foundation under section 507(b		
-			om Part II, co		1		her (spe					F If the foundation is		
		► \$	1,8					d) must be or	cash basis)			under section 507(b		
P		_	vsis of Reve	nue	and Expense			· · · · · · · · · · · · · · · · · · ·	1			·	T .	oursements
		total d	of amounts in c	olun	nns (b), (c), and	(d)		evenue and enses per	(b) Net inve		(c) Adjusted net	1	haritable
					ial the amounts I of the instruction			oooks	incon	16		income		rposes basis only)
\neg	1				received (attach sche			25,000				 	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
	2	Check	if the f	found	dation is not requi	red to [_		
	3		4110011		B			22,723	 				ATC	<u> </u>
	4		-		om securities	ſ		27,133					ATC	
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aı			•		of assets not on lir		·-	-103,064	1					
ğ	b	Gross s	sales price for all	3010	507,	147.								
Revenue	7		on line 6a Il dain net inco		(from Part IV, lir	ne 2)						RECEIVE	1	
۲	8				ın						<u></u>		18	
	9									16		MAR 2 9 201	h 19	
		Gross s	ales less returns owances			Ī				17	7	MAK & S EO.	. E	
ŀ	b		cost of goods sok								ييل		7 4	
	С	Gross	profit or (loss)	(att	ach schedule)							<u>OGDEN L</u>	10 !	
- 1	11				hedule)					1-				
	12				gh 11			-28,208	<u> </u>					
	13	Compe	ensation of office	ers, d	rectors, trustees, e	etc								
,	14	Other	employee sala	aries	and wages								1	
	15	Pensi	on plans, empl	loye <u>e</u>	e benefits_,_,_				<u> </u>					
		Legal	fees (attach so	ched	ule) ATCH .	3 J		1,575	<u> </u>	0.		0.		0
Ž.	b	Accou	inting fees (at	tach	schedule) [4]			2,725		0.		0.		0
Administrative Expen	С	Other	professional f	ees	(attach schedule)								
rati	17	Intere	st											
ist E	18	Taxes	(attach schedule)) (see	page 14 of the instr	uctions) * *		61	-				<u> </u>	
딅	19	Depre	ciation (attach	n sch	nedule) and dep	letion .								
اڌٍ	20	Occup	pancy			[
	21	Travel	l, conferences,	, and	meetings					_				
	22				s				ļ			_		
<u> </u>	23	Other	expenses (atta	ach :	schedule) [6]	۱		8,581	<u> </u>					
Operating	24	Total	operating and	d ad	ministrative exp	enses				_		_		_
ᆲ			_		3	1		12,942		0.				00.00
۷	25	Contri	ibutions, gifts,	grai	nts paid	}		80,000	1				ļ	80,000
\perp	26	Total ex	penses and disbu	rsem	ents Add lines 24	and 25_		92,942	<u> </u>	0.		0	 	80,000
	27	Subtra	act line 26 fro	m lin	ne 12									
ı					es and disburseme			-121,150	 				 	
					(if negative, ent				ļ	-0-			<u> </u>	<u>_</u>
	С	Adjus	ted net incom	ie (if	negative, enter	-0-)						-0-	l	

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions. 9E1410 1 000 RX1737 2337 3/15/2010 10:39:03 AM V 09-4.3

JsA ** ATCH 5 29-200603-01

Form 990-PF (2009)

PAGE 1

52-2279879

Ð	art II	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year	Beginning of year	End of	year
_		amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	8,535.	13,094.	13,094.
	2	Savings and temporary cash investments	14,106.	74,603.	74,603.
	3	Accounts receivable			
		Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
	•	disqualified persons (attach schedule) (see page 16 of the instructions)			
	7	Other notes and loans receivable (attach schedule)		-	
	•	Less allowance for doubtful accounts			
	8				
Assets		Inventories for sale or use	-		
SS	9	Prepaid expenses and deferred charges			
٨		investments - U.S. and state government obligations (attach schedule)	1, 186, 272.	990,181.	1,178,590.
		Investments - corporate stock (attach schedule) ATCH 8	495,616.	504,360.	549,287.
	11 °	Investments - corporate bonds (attach schedule) ATCH 9 Investments - land, buildings, and equipment basis	493,010.	304,300.	343,207.
		Less accumulated depreciation (attach schedule)			
	12	Investments - mortgage loans			
	13 14	Investments - other (attach schedule) Land, buildings, and equipment basis Less accumulated depreciation			
	4.5	(attach schedule)			
	15	Other assets (describe			
	16	Total assets (to be completed by all filers - see the	1,704,529.	1,582,238.	1,815,574.
_		ınstructions Also, see page 1, item I)	1,704,329.	1, 302, 230.	1,015,574.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
ies	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons .			
jab	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe			
	23	Total liabilities (add lines 17 through 22)			
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
ės	24	Unrestricted			
lances	25	Temporarily restricted			
	26	Permanently restricted		· · · · · · · · · · · · · · · · · · ·	
В	20	Foundations that do not follow SFAS 117,			
Fund		_check here and complete lines-27-through 31.————X			
9	27	Constal stock truck primainal as augreent funda			
	28				
Net Assets	28	Paid-in or capital surplus, or land, bldg , and equipment fund	1,704,529.	1,582,238.	
As	30	Retained earnings, accumulated income, endowment, or other funds	2,101,0231	2,002,200	
et	30	Total net assets or fund balances (see page 17 of the	1,704,529.	1,582,238.	
2		Instructions)	1,,01,023.	1,002,200.	
	31	Total liabilities and net assets/fund balances (see page 17	1,704,529.	1,582,238.	
		of the instructions)		1,302,230.	
		Analysis of Changes in Net Assets or Fund B		I I	
1		al net assets or fund balances at beginning of year - Part II,			1 704 500
		of-year figure reported on prior year's return)			1,704,529.
					-121,150.
3	Oth	er increases not included in line 2 (itemize) ▶		3	
4	Add	lines 1, 2, and 3		4	1,583,379.
		lines 1, 2, and 3			1,141.
		al net assets or fund balances at end of year (line 4 minus li			1,582,238.
		**ATCH 7			Form 990-PF (2009)

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. 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? If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part I Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries. (a) (b) (c) (c) (c) (c) (c) (c) (c) (c) (c) (c	(a) List and 2-story br	and Losses for Tax on Inv describe the kind(s) of property sold (lick warehouse, or common stock, 200	e g , real estate,	(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
(e) Gross sales price (e) Gross sales price (f) Depreciation allowed (or allowable) (or all	1a SEE PART IV SCHE	DULE				_
(e) Gross sales price (f) Depreciation allowed (or allowable) (or plus expense of sale (or plus (f) minus (g)) (or plus (f) minus (g) (or plus	<u>b</u>			ļ		-
(e) Gross sales proce (f) Depreciation allowed (g) Cost or other basis plus expense of sale (h) Cam or (loss) (e) plus (f) minus (g) a Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (g) FM V as of 12/31/69 a b Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (g) FM V as of 12/31/69 (g) FM V as of 12					ļ	
(e) Gross sales price (f) Depreciation allowed (g) Cost or other basis plus expense of sale (h) Gains or Josse) (c) plus (f) minus (g) c d c 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 (ii) Adjusted basis as of 12/31/69 (iii) Adjusted basis as of 12/31/69 (iv) F M V as of 12/31/69 (iv) Adjusted basis as of 12/31/69 (iv) F M V a	<u>d</u>				<u> </u>	
(e) glus (f) minus (g) b c d e Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (ii) Gains (Col. (h) gain minus (g) (ii) FMV as of 12/31/69 (ii) Adjusted basis as of 12/31/69 (iii) Gains (Col. (h) gain minus (iii) FMV as of 12/31/69 (iii) Adjusted basis as of 12/31/69 (iii) Gains (Col. (h) gain minus (iii) FMV as of 12/31/69 (iii) Adjusted basis as of 12/31/69 (iii) Gains (Col. (h) gain minus (iii) Gains (Col. (h) gain minus (iii) FMV as of 12/31/69 (iii) Gains (Col. (h) gain minus (iii) Gains (Col. (h) gains (Co	<u>e</u>		T T T T T T T T T T T T T T T T T T T	 	<u> </u>	L
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a b continue of 12/31/69 as of 12/31/69 be over col (i), if any losses (from col (in)) a b color of the capital loss of 12/31/69 be color of 1/20/40 be color	Complete only for assets sr					
c d d d d d d d d d d d d d d d d d d d	(i) F M V as of 12/31/69					
c d d d d d d d d d d d d d d d d d d d				<u> </u>		
de 2 Capital gain net income or (net capital loss)						
The 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? If enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entres (b) divided by a color any year (c) divided by a color and 100,000. Adjusted qualifying distributions 2008 100,000 100						
2 Capital gain net income or (net capital loss)				<u> </u>		
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) 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 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) (c) (b) (c) (d) (_ei	, If	acin plan enter in Bort Lline 7	<u> </u>		
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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 (column for tax year beginning in) 2008	Was the foundation liable for	the section 4942 tax on the distrib		ase pend	od? [Yes X No
Calendar year (or lax year beginning in) Adjusted qualifying distributions Net value of noncharitable-use assets Calendar year (or lax year beginning in) Adjusted qualifying distributions Net value of noncharitable-use assets Color (b) divided by col (c)				efore ma	king any entries	
Distribution ratio Col (b) dwided by col (c)				T Tila		
2007 122,443. 2,242,738. 0.054 2006 105,438. 2,066,698. 0.051 2005 105,430. 2,066,698. 0.051 2004 106,906. 2,026,076. 0.052 2 Total of line 1, column (d) 2 0.262 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 0.052 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 4 1, 607, 5 Multiply line 4 by line 3 5 84, 6 Enter 1% of net investment income (1% of Part I, line 27b) 6	Base period years Catendar year (or tax year beginning in)	Adjusted qualifying distributions	Net value of noncharitable-use assets		Distribution i	y col (c))
2006						
2005 105, 430. 2, 066, 698. 0.051 2004 106, 906. 2, 026, 076. 0.052 2 Total of line 1, column (d) 2 0.262 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 0.052 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 4 1, 607, 5 Multiply line 4 by line 3 5 84, 6 Enter 1% of net investment income (1% of Part I, line 27b) 6				 		0.034393
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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 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 5 Multiply line 4 by line 3 6 Enter 1% of net investment income (1% of Part I, line 27b)	2004	100, 300:	2,020,070.	 		0.002703
number of years the foundation has been in existence if less than 5 years 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 5 Multiply line 4 by line 3 6 Enter 1% of net investment income (1% of Part I, line 27b)				2		0.262461
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 5 Multiply line 4 by line 3 6 Enter 1% of net investment income (1% of Part I, line 27b)		•		,		0.052492
5 Multiply line 4 by line 3 5 84, 6 Enter 1% of net investment income (1% of Part I, line 27b) 6	number of years the found	Jation has been in existence in less	strian 5 years			01440132
6 Enter 1% of net investment income (1% of Part I, line 27b)	4 Enter the net value of non	charitable-use assets for 2009 fro	om Part X, line 5	4	· ·	1,607,400.
	5 Multiply line 4 by line 3 .			5		84,376.
7 Add lines 5 and 6	6 Enter 1% of net investmen	nt income (1% of Part I, line 27b)		6		
1 1	7 Add lines 5 and 6			7		84,376.
8 Enter qualifying distributions from Part XII, line 4 80, 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 S	8 Enter qualifying distributio	ns from Part XII, line 4	anda walan kan ana ana ana	8		80,000.

Par	Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 18 of the	ne ins	tructio	ns)						
1 a	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			0.						
	here and enter 1% of Part I, line 27b									
С	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4%									
	of Part I, line 12, col (b)									
2										
3	Add lines 1 and 2			0.						
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			<u> </u>						
6	Credits/Payments									
	2009 estimated tax payments and 2006 overpayment credited to 2009 64									
	Exempt foreign organizations-tax withheld at source									
	Tax paid with application for extension of time to lile (Form 8606)									
d	Backup withholding erroneously withheld		-	79.						
7	Total credits and payments Add lines 6a through 6d		<u>_</u>	79.						
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached									
9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed			79.						
10	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			79.						
11	Enter the amount of line 10 to be Credited to 2010 estimated tax Refunded 11			15.						
	t VII-A Statements Regarding Activities			Al -						
1 a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it		Yes	No X						
	participate or intervene in any political campaign?	1a								
Ь	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19	45		Х						
	of the instructions for definition)?	1b								
	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	1c		Х						
C	Did the foundation file Form 1120-POL for this year?	10								
a	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation (2) On foundation managers \$\bigsim \frac{\pi}{2} = \frac{\pi}{2}									
	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed	i l								
e										
_	on foundation managers \$ Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		Х						
2	If "Yes," attach a detailed description of the activities									
2	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of									
3	incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		Х						
4.5	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X						
4a	If "Ves " has it filed a toy return on Form 999 T for this year?	4b		Х						
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		Х						
•	If "Yes," attach the statement required by General Instruction T									
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	Х							
8 a	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	8 b	Х							
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						
		orm 99	0-PF	(2009)						

	t VII-A Statements Regarding Activities (continued)			-30 0
	'At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the			
• • •	meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11_		Х
40	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before			
12	August 17, 2008?	12		Х
4.0	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
13	Website address ► N/A			
1.4	The books are in care of THE HERSON-STIRMAN FAMILY FDN Telephone no 301-229	70	ō5	
14	The books are in care of ►THE HERSON-STIRMAN FAMILY FDN Telephone no Located at ►24601 BEVERLY ROAD, ST. MICHAELS, MD ZIP+4 ► 21663			
46	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		▶	\prod
15	and enter the amount of tax-exempt interest received or accrued during the year			
Par	t 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?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a			
	disqualified person? Yes X No	1		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X 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 X 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 X 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	ļ	
	Organizations relying on a current notice regarding disaster assistance check here			
С	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	1	<u>X</u>
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))			
а	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and			
	de, Part Alli) for tax year(s) beginning before 20037			
	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)	2.5		х
	to all years listed, answer "No" and attach statement - see page 20 of the instructions)	2 b	 	
С	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		-	
٥.	Did the foundation held were then a 20% direct an indirect interest in one business.			
зa	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?			
h	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	ļ		
	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)	3 Ь		
4 a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
	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?			X
	•			(0000)

-Oill 930-FF (2009)					· age •					
Part VII-B Statements Regarding Activities for	or Which Form 4	720 May Be Requ	ired (continued)							
5a During the year did the foundation pay or incur any amou	int to									
(1) Carry on propaganda, or otherwise attempt to influer	nce legislation (section	4945(e))?	. Yes X No							
(2) Influence the outcome of any specific public election	(see section 4955), o	r to carry on,								
directly or indirectly, any voter registration drive?			Yes X No							
(3) Provide a grant to an individual for travel, study, or other	her similar ournoses?		Yes X No		ł					
(4) Provide a grant to an organization other than a chari			•							
section 509(a)(1), (2), or (3), or section 4940(d)(2)?	-		Yes X 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 X No									
b If any answer is "Yes" to 5a(1)-(5), did any of the trans										
Regulations section 53 4945 or in a current notice regard	ling disaster assistanc	e (see page 22 of the	instructions)?	· · 5b						
Organizations relying on a current notice regarding disas	ter assistance check h	ere	▶∟							
c If the answer is "Yes" to question 5a(4), does the foundation	ation claim exemption (from the tax								
because it maintained expenditure responsibility for the g	rant?		Yes X No							
If "Yes," attach the statement required by Regulations sec	tion 53 4945-5(d)									
6a Did the foundation, during the year, receive any funds, of		pay premiums								
on a personal benefit contract?			Yes X No		ł					
b Did the foundation, during the year, pay premiums, direct				6ь	X					
If "Yes" to 6b, file Form 8870	stry or maneotry, orrul	personal benefit contra								
7a At any time during the tax year, was the foundation a pa	rty to a prohibited tax	shelter transaction?	Yes X No							
b If yes, did the foundation receive any proceeds or have					-					
Part VIII Information About Officers, Directors										
and Contractors		_								
1 List all officers, directors, trustees, foundation m		compensation (see								
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter	(d) Contributions to employee benefit plans	(e) Expense other allow						
	devoted to position	-0-)	and deferred compensation							
TOWN OVER 11		-0-	-0-	-0	\ _					
ATTACHMENT 11			-0-							
	,									
			<u> </u>							
2 Compensation of five highest-paid employees (ot	her than those inc	luded on line 1 - se	e page 23 of the inst	ructions).						
If none, enter "NONE."			(d) Contributions to							
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average	(c) Compensation	(d) Contributions to employee benefit	(e) Expense						
(a) Marile and dadress of each employee paid more than 555,555	hours per week devoted to position	(e) companion	plans and deferred compensation	other allow	wances					
NONE										
	ļ									
Total number of other employees paid over \$50,000 .										
	_			Form 990	-PF (2009)					

Part VIII	and Contractors (continued)	oyees,
3 Five high	est-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 numb	er of others receiving over \$50,000 for professional services	→ NONE
		NOINE
Part IX-A	Summary of Direct Charitable Activities	
List the foun	dation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number	
	ons and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 N/A		
2		
3		
4		
Part IY-R	Summary of Program-Related Investments (see page 23 of the instructions)	
	two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE		
2		
•	gram-related investments. See page 24 of the instructions	
3 NONE		
	hand 4 through 2	
T-4-1 A-1-1		

Pa	 Minimum Investment Return (All domestic foundations must complete this part. Foreits see page 24 of the instructions.) 	gn foundatior	18,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes		
а	Average monthly fair market value of securities	1a	1,621,526.
b	Average of monthly cash balances	1 b	10,352.
С	Fair market value of all other assets (see page 24 of the instructions)	1c	0.
d	Total (add lines 1a, b, and c)	1d	1,631,878.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	1 2	0.
3	Subtract line 2 from line 1d	3	1,631,878.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see page 25		
	of the instructions)	4	24,478.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,607,400.
6	Minimum investment return. Enter 5% of line 5	6	80,370.
Pa	Tt XI Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) privation foundations and certain foreign organizations check here ▶ ☐ and do not complete this j		
1	Minimum investment return from Part X, line 6	1	80,370.
2 a	Tax on investment income for 2009 from Part VI, line 5		
b	Income tax for 2009 (This does not include the tax from Part VI) 2b	1	
c	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	80,370.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	80,370.
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	80,370.
	Qualifying Distributions (see page 25 of the instructions)	1 - 1	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes	1 _a	80,000.
a	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1b	0.
b	Program-related investments - total from Part IX-B Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.	10	
2			0.
_	purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		0.
a	Suitability test (prior IRS approval required)	3a	0.
b	Cash distribution test (attach the required schedule)	3b	80,000.
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income	_	— N/A
_	Enter 1% of Part I, line 27b (see page 26 of the instructions)	6	80,000.
6	Adjusted qualifying distributions. Subtract line 5 from line 4		
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating v qualifies for the section 4940(e) reduction of tax in those years	vitetrier trie fou	nuauon

52-2279879 Page 9 Form 990-PF (2009)

1 Distributable amount for 2008 from Part XI, line 7	Pa	rt XIII Undistributed Income (see page	26 of the instruction	ns)		
Distributions alrowing 1 mg, so of the end of 2009	_	Distributable amount for 2000 from Bart VI			• • • • • • • • • • • • • • • • • • • •	
Undestroaced income, if any, as of the end of 2009	1	` [001940			
a Enter amount for 2009 only 5 Total for proyress 20 07 20 06 20 05 5 Excess distributions carryover, if any, to 2009 a From 2006	_					
5 Total for prior years 2,0 07, 20, 66, 20, 05 5 Excess distributions carryover, if any, to 2009 a From 2004		ı				
3 Excess distributions carryover, if any, 10 2009 a From 2004				0.		
a From 2004 952. b From 2005 (4,635. c From 2006 (2,264. d From 2007 (10,420. d From 2007 (6,613. f Total of lines 3a through e						
6 From 2005 2, 254. c From 2006 2, 264. d From 2007 10, 420. e From 2008 6, 613. 1 Total of lines 3a through e 24, 884. Qualifying distributions for 2009 from Part XII, line 4 ► \$ 80,000. 30,000. A Applied to 2008, but not more than line 2a. 4 Applied to 2008, but not more than line 2a. A Applied to 2009 Sub traction of corpus (Election required - see page 26 of the instructions). 6 Applied to 2009 distributions arroyer applied to 2009. d Applied to 2009 distributions arroyer applied to 2009. 0. 8 Excess distributions carroyer applied to 2009. 370. d a memount appears in column (a). 8 Excess distributions carroyer applied to 2009. d a memount appears in column (a). 8 Excess distributions carroyer applied to 2009. d Erief the net total of each column as indicated below: 24,514. d Cropus Add lines 31, 4c, and 46 Subtract line 5 24,514. b Prior years' undistributed incomes Subtract line 4b from line 2b 0. c Enter the amount of prior years' undistributed income subtract line 4b from line 2b (2008, Subtract line 4d from line 2b (2008, Subtract line 4d and 5 from line 8b Taxable amount see page 27 of the instructions. 0. d Indistributed income for 2008 Subtract		1 050				
E From 2006		F10III 2004				
d From 2007		110111 2000				
From 2008		110 2000				
Total of lines 3a through e		From 2008 6, 613.				
4 Qualifying distributions for 2009 from Part XII, Inc 4 ▶ \$ 80,000. a Applied to 2008, but not more than line 2a. b Applied to 2008, but not more than line 2a. c Treated as distributions out of corpus (Election required - see page 26 of the instructions). d Applied to 2009 distributable amount. e Remaining amount distributed out of corpus 5. Excess distributions carryover applied to 2009. glf an amount appears in column (gl, the same amount must be shown in column (a)). Entrer the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 5. b Pror years' undistributed income Subtract line 4 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. Undistributed income for 2008 Subtract line 4 from line 10 from line 2b. Amounts treated as distributions out of corpus to satisfy requirements imposed by section 1700(h1)(f) or 4942(g)(3) (see page 27 of the instructions). Excess form 2006 in inc 7 (see page 27 of the instructions). Excess distributions carryover to 2010. Subtract lines 5 (see see situations). Excess distributions carryover to 2010. Subtract lines 4 from line 7 (see page 27 of the instructions). Excess distributions carryover to 2010. Subtract lines 4 from line 6 (see page 27 of the instructions). Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6 (see page 27 of the instructions). Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6 (see page 27 of the instructions). Excess from 2006 2, 2, 264. Excess from 2006 6, 6, 613.		1	24,884.			
In 4 ▶ \$ 80,000. a Applied to 2008, but not more than line 2a. b Applied to undistributed income of prior years (Election required - see page 26 of the instructions). d Applied to 2009 distributable amount e Remaining amount distributed out of corpus. Excess distributions carryover applied to 2009. If an amount appears in column (8), the same amount must be shown in column (a). E There the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 5 Pror years' undistributed income Subtract line 4b from line 2b. Enter the amount of prior years' undistributed not which the section 4942(a) tax has been previously assessed. d Subtract line 6c from line 6b Taxable amount reuse page 27 of the instructions. Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount must be distributed income for 2008 Subtract line 4a from line 2a Taxable amount income for 2008 Subtract line 4a from line 2a Taxable amount must be distributed income for 2008 Subtract line 4a from line 2a Taxable amount must be distributed income for 2009 Subtract lines 4a from line 2a Taxable amount must be distributed income for 2008 Subtract lines 4a from line 2a Taxable amount must be distributed in 2010. Amounts treated as delirabutions out of corpus to astisty requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions). Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions). Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 23, 932. Excess from 2006 2, 2, 264. Excess from 2006 6, 6, 613.						
a Applied to 2008, but not more than line 2a. b Applied to undistributed moome 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 . e Remaining amount distributed out of corpus . 5 Excess distributions carryover applied to 2009 (if an amount appears in column (d), the same amount must be shown in column (a)). 6 Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income Subtract line 4b from line 2b. c Enter the amount of prior years' undistributed income form 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 6b from line 6b. Taxable amount - see page 27 of the instructions . e Undistributed income for 2008 Subtract lines 4d from line 2a. Taxable amount - see page 27 of the instructions . 1 Undistributed income for 2009 Subtract lines 4d and 5 from line 1. This amount must be distributions carryover from 2004 not applied on line 50 line 7 (see page 27 of the instructions) . 9 Excess form 1006 . 2, 264 . 10 Analysis of line 9 Excess form 2006 . 2, 264 . Excess from 2006 . 2, 264 . Excess from 2006 . 6, 613 .	4	00 000				
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. Remaining amount distributed out of corpus. Excess distributions carryover applied to 2009. 5 Excess distributions carryover applied to 2009. 370. g(f an amount appears in column (d), the same amount must be shown in column (a)). Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 5 Prior years' undistributed income Subtract line 4b from line 2b. Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(g) tax has been previously assessed. d Subtract line 8c from line 8b Taxable amount - see page 27 of the instructions. Undistributed income for 2008 Subtract lines 4a from line 2a Taxable amount - see page 27 of the instructions. Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010. Analysis of line 9 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions). Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions). Excess from 2006 .	•					•
required - see page 26 of the instructions) C Treated as distributions out of corpus (Election required - see page 25 of the instructions). d Applied to 2009 distributable amount Remaining amount distributed out of corpus Excess distributions carryover applied to 2009 (If an amount appears in column (a)) E Excess from 2005 Excess from 2006 Corpus Add lines 3f, 4c, and 4e Subtract line 5 Prior years' undistributed income Subtract line 4b from line 2b Corpus Add lines 3f, 4c, and 4e Subtract line 5 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 Undistributed income for 2008 Subtract lines 4d from line 2 Taxable amount - see page 27 of the instructions to satisfy requirements unposed by section 170(b)(1)(f) or 4942(g)(3) (see page 27 of the instructions). Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions). Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a Excess from 2006 Excess from 2007 Excess from 2007 Excess from 2008 Excess from 2008 Excess from 2007 Excess from 2008 Excess from 2007 Excess from 2008 Ex		· · · · · · · · · · · · · · · · · · ·	· · ·			
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)	b					
required - see page 26 of the instructions). d Applied to 2009 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2009 diff an amount appears in column (a), the same amount must be shown in column (a). Enter the net total of each column as indicated below: a Corpus Add lines 31, 4c, and 4e Subtract line 5 b Prior years' undistributed income Subtract line 4 from line 26 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 6 from line 6b Taxable amount - see page 27 of the instructions. e Undistributed income for 2008 Subtract line 4a from line 23 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. Amounts treated as distributions out of corpus to satisfy requirements imposed by section 1700(b)(f)(f) or 4942(g)(3) (see page 27 of the instructions). Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions). Excess firm 2005		· · · · · · · · · · · · · · · · · · ·				
d Applied to 2009 distributable amount Remaining amount distributed out of corpus Excess distributions carryover applied to 2009 If an amount appears in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be shown in column (a), the same amount must be deficiency has been susued, 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. Undistributed income for 2008 Subtract lines 4a from line 2a Taxable amount - see page 27 of the instructions. Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010. Amounts freated as distributions out of corpus to satisfy requirements imposed by section 170b(h1(f)) of 4942(g) (3) (see page 27 of the instructions). Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions). Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a Analysis of line 9 Excess from 2006. 4, 635. Excess from 2006. 2, 264. Excess from 2007. 10, 420. Excess from 2007. 6, 613.	С					
e Remaining amount distributed out of corpus 5 Excess distributions carryover to 2010. (If an amount appears in column (a), the same amount must be shown in column (a) to Enter the net total of each column as indicated below: 2 Corpus Add lines 3f, 4c, and 4e Subtract line 5 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 8c from line 6b Taxable amount - see page 27 of the instructions. Undistributed income for 2009 Subtract lines 4d afrom line 2 Taxable amount - see page 27 of the instructions. Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010. 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). Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions). Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 Excess from 2006 .	d					80,000.
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a)) 5 Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 5 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 6b Taxable amount - see page 27 of the instructions Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions f Undistributed income for 2008 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to salisty requirements imposed by section 170(b)(1)(f) or 4942(g)(3) (see page 27 of the instructions) Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions) Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 23, 932. 10 Analysis of line 9 a Excess from 2005 4, 635 b Excess from 2006 6, 613.			0.			
If an amount appears in column (d), the same amount must be shown in column (a)			370.			370.
Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income Subtract line 4b from line 2b		(If an amount appears in column (d), the same				
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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	٠					
b Prior years' undistributed income Subtract line 4b from line 2b	а	Corpus Add lines 3f, 4c, and 4e Subtract line 5	24,514.			
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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	С	Enter the amount of prior years' undistributed				
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						
amount - see page 27 of the instructions e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010. 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions) . 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions) . 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a . 10 Analysis of line 9 a Excess from 2005 .		· · · · · · · · · · · · · · · · · · ·				
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4a from line 2a Taxable amount - see page 27 of the instructions		amount - see page 27 of the instructions		0.		
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions) 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 23, 932. 10 Analysis of line 9 a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 6, 613.	е					
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4d and 5 from line 1 This amount must be distributed in 2010. 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)	f	Undistributed income for 2009 Subtract lines				
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)	·	4d and 5 from line 1. This amount must be				
to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)						
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8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)						
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9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 23,932. 10 Analysis of line 9 a Excess from 2005 .	0		502			
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10 Analysis of line 9 a Excess from 2005	9		22 922			
a Excess from 2005			25, 352.			
b Excess from 2006		1				
c Excess from 2007 10, 420 . d Excess from 2008 6, 613 .		2.000				
d Excess from 2008 6, 613.	0					
- 2X355 Holli 2555	ن بہ	2.00000				
		EX3333 HOIN 2000				

Forn	n 990-PF (2009)			52-2	279879	Page 10
Рa	rt XIV Private Oper	ating Foundations (see page 27 of the	instructions and Pa	art VII-A, question 9)	NOT APPLICABLE
1 a	If the foundation has	received a ruling or d	etermination letter that	it is a private oper	rating	
	foundation, and the ruling	g is effective for 2009, e	nter the date of the ruling		. ▶	
ь	Check box to indicate wh	ether the foundation is a	private operating found	ation described in section	4942()	(3) or 4942(j)(5)
2 a	Enter the lesser of the ad-	Tax year		Prior 3 years		(e) Total
4 4	justed net income from Part	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(0) 101411
	I or the minimum investment					
	return from Part X for each year listed					
b	85% of line 2a					
c	Qualifying distributions from Part					
٠	XII, line 4 for each year listed .					
ď	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					
а	alternative test relied upon "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 invest- ment 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 sup- port from an exempt					
	organization					
	(4) Gross investment income	<u> </u>				
ž	art XV Supplement	ary Information (C during the year - se	omplete this part	only if the found	lation had \$5,000	or more in assets
_	Information Regardin					
١	List any managers of			e than 2% of the tot	al contributions receiv	ed by the foundation
u	before the close of any	y tax year (but only if the	ney have contributed r	nore than \$5,000) (See section 507(d)(2))	!
	ATTACHM	ต ท⊤ 12				
<u> </u>	List any managers of		own 10% or more-of	the_stock-of-a-corr	oration-(or-an-equal)	v-large-portion of the
	ownership of a partne	rship or other entity) o	f which the foundation	has a 10% or greate	er interest	, негда размен от пле
	, ,	, ,,		•		
	N/A					
2	Information Regardin	g Contribution, Gran	t, Gift, Loan, Scholarsh	nip, etc., Programs:		
	Check here ► X If	the foundation only	makes contributions	to preselected char	ritable organizations a	and does not accept
	unsolicited requests	for funds If the four	idation makes gifts, g	rants, etc (see pag	e 28 of the instruction	ons) to individuals or
	organizations under of	ther conditions, compl	ete items 2a, b, c, and	d		
а	The name, address, a	and telephone number	of the person to whor	n applications should	be addressed	
b	The form in which app	olications should be su	bmitted and information	on and materials they	y should include	
С	Any submission dead	ines				
d	Any restrictions or I	ımıtatıons on awards	, such as by geogra	aphical areas, charit	able fields, kinds of	institutions, or other
-	factors		, , , , , , , , , , , , , , , , , , , ,	•		•

art XV Supplementary Information (co B Grants and Contributions Paid Duri	ng the Year or Appl	oved for F	uture Payment	
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient	contribution	
Paid during the year				
			ĺ	
ATTACHMENT 13				
		1		
Total			▶ 3a	80,000
Approved for future payment				
, ,				
		<u> </u>		
	1			
		_1	▶ 3b	

Form 990)-PF (2009)			52-	-2279879	Page 12
Part >		cina Activ	vities			<u></u> _
•				Cualing and be		(e)
Enter gr	oss amounts unless otherwise indicated	(a) Business code	(b) Amount	(c) Exclusion code	y section 512, 513, or 514 (d) Amount	Related or exempt function income (See page 28 of
1 Prog	ram service revenue	- Business code	Amount -	Exclusion code	Amount	the instructions)
а						
b				<u> </u>		
С				ļ		
d				<u> </u>		
e						
f						
g i	Fees and contracts from government agencies					
2 Men	nbership dues and assessments	·····				
	est on savings and temporary cash investments		10.05.6	14		
4 Divid	dends and interest from securities		49,856.	14		
5 Net	rental income or (loss) from real estate					
а	Debt-financed property					
b	Not debt-financed property					
6 Net r	ental income or (loss) from personal property .			ļ		
7 Othe	er investment income					
8 Gain	or (loss) from sales of assets other than inventory		-103,064.	18		
9 Net	income or (loss) from special events					
10 Gros	ss profit or (loss) from sales of inventory					
11 Oth	er revenue a					
ь						
С						
d						
ę				ļ		
12 Sub	total Add columns (b), (d), and (e) at Add line 12, columns (b), (d), and (e)		-53,208.			-53,208.
(See wo	orksheet in line 13 instructions on page 28 KVI-B Relationship of Activities	to verify calc	ulations)			
Line N	Explain below how each active the accomplishment of the formage 29 of the instructions.)	ity for whi oundation's	ch income is reported exempt purposes (o	in columi	n (e) of Part XVI-A cor by providing funds for	ntributed importantly to such purposes) (See
						
-						
			· · · · · · · · · · · · · · · · · · ·			
		-				
		_	NOT APPLICABL	E		
	-					
		-			-	
		_				
						
	- 					
						
						· · · · · · · · · · · · · · · · · · ·
						

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 (b) Amount involved (c) Name of noncharitable exempt organization (c) Description of transfers, transactions, and sharing arrangements 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? (a) Name of organization (b) Type of organization (c) Description of relationship Under penalties of perjuny, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, us true, correct, and complete Declaration of preparer (other than taxpayer or inducing) is based on all information of which preparer has any knowledge and base of the contraction of preparer (other than taxpayer or inducing) is based on all information of which preparer has any knowledge. Title Preparer's identitying Preparer's identitying Title Preparer's identitying Preparer's identitying Title Preparer's identitying Preparer's identitying	Part X	VII Information Exempt Or		Transfers To and	Transactio	ns and Rela	ationships	With N	oncha	ritable
(2) Other assets b Other transactions (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan quarantees (6) Loans or loan quarantees (6) Loans or loan quarantees (6) Performance of services or membership or fundrasing solicitations (7) Table (1) X (8) Loans or loan quarantees (8) Loans or loan quarantees (9) Loans or loan quarantees (1) Table (1) X (1)	ın	section 501(c) of the	Code (other than	n section 501(c)(3) orga	nizations) or				Ye	es No
b Other transactions (1) Sales of assets for an oncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan guaranties (6) Loans or loan guaranties (7) Performance of services or membership or fundrassing solicitations (8) Performance of services or membership or fundrassing solicitations (9) Performance of services or membership or fundrassing solicitations (9) Life of goods, other assets, or paid employees (1) If the answer to any of the above is "Yes," complete the following schedule Column (b) should always show the fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received 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 nonchantable exempt organization (d) Description of transfers, transactions, and sharing arrangements N/A N/A 2 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? (a) Line no (b) Tyes, "complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship Under penalties of perjusy, 1 decisie that 1 have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, us they correct, and complete Declaration of propose (other than taxpaper of iducation of based on all informating of which incipater has any knowledge belief, us they correct, and complete Declaration of propose (other than taxpaper of iducation of based on all informating of which incipaters and statements, and to the best of my knowledge and belief, us the second of the ord trustee.	(1)) Cash						[1	a(1)	
(1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (6) Loans or loan guarantees (15) Loans or loan guarantees (16) Loans or loan guarantees (17) Loans or loan guarantees (18) Loans or loans guarantees (18) Loans guara									a(2)	- ×
(2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan guarantees (6) Loans or loan guarantees (7) Loans or loan guarantees (8) Performance of services or membership or fundrasing solicitations (8) Performance of services or membership or fundrasing solicitations (9) Life (1) X (15) X (16) X (15) X (15			acharitable evemnt	organization				,	b(1)	l x
(a) Remital of facilities, equipment, or other assets										
(4) Reimbursement arrangements 114(4) X 15(5) X (5) Loans or loan guarantees 15(6) Loans or loans guarantees 15(6) Loans guarantees										Х
(6) Leans or loan guarantees (6) Performance of services or membership or fundraising solicitations (6) Performance of services or membership or fundraising solicitations (7) Sharing of facilities, equipment, mailing lists, other assets, or paid employees (8) It 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 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? b If "Yes," complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship Under penalties of prijary, I declare that I have examined the return, including accompanying schedules and statements, and to the best of my knowledge and belief, first true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary is based on all information of which preparer is adentifying that the preparer's identifying in under fire Ses Signature on the proparer is destinifying that the preparer's identifying in under the Ses Signature on the proparer is destinifying that the preparer's identifying in under the session propagation in the propagatio									b(4)	
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(a) Line no (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements N/A N/A 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? b. If "Yes," complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship Under penalties of perjuny, 1 declare that 1 have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, the true, correct, and complete Declaration of preparer fother than taxpayer or fiduciana is based gn all informating of which preparer has any knowledge and Signature of Officer or trustee Date Date Preparer's identifying pumpler (See Signature on Date)		=								
N/A N/A N/A N/A N/A N/A N/A N/A										
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Signature of bricer or trustee Date Date Check if self-employed Preparer's identifying number (See Signature on page 30 of the instructions)	Ur be	nder penalties of perjury, 1 cellef, it is true, correct, and cellef.	eclare that I have exomplete Declaration	kamined this return, including of preparer (other than taxpo	accompanying eyer or fiduciary	schedules and sta	atements, and t	o the best of	my knov has any l	vledge and knowledge
Signatúre of ófficer or trustee Daite Title Preparer's identifying number (See Signature on page 30 of the instructions)		1 chara	, pura	<u>~</u> _	1/5	122/60	1 un	Vun 1	<u> </u>	
Date Check if self-employed Preparer's Identifying number (See Signature on page 30 of the instructions)	e	Signature of officer or trust	ee		1	e 	Title	Propororio u	dontifica	
A DESISTRATURE V KNI/ AN TIVO V TO COM DITITION	Sign H	Preparer's signature	a b	worm-cet	Date 3		loyed ►	number (See	Signatui	re on
a a b Firm's name (or yours if ► REZNICK GROUP, P.C. EIN ► 52-1088612		Firm's name (or your	sıf REZNI	CK GROUP, P.C.	1-11-5-	·	EIN ▶	2-10886	12	
sen-eniployed), address, 7 7700 Old GEORGETOWN ROAD, SOTTE 400	هٔ ا	sen-employed), addit		OLD GEORGETOWN	ROAD, SU					
and ZIP code BETHESDA, MD 20814-6224 Phone no 301-652-9100	<u>L.</u>	and ZIP code	BETHE	SDA, MD		20814-622	24 Phone no			

Schedule B

Schedule of Contributors

OMB No 1545-0047

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

► Attach to Form 990, 990-EZ, or 990-PF.

Name of the organization		Employer Identification number
THE HERSON-STIRMAN	FAMILY	52-2279879
FOUNDATION, INC. Organization type (check or	ne)	1 32-22/30/3
Organization type (oncok or		
Filers of:	Section:	
Form 990 or 990-EZ	501(c)() (enter number) organization	
	4947(a)(1) nonexempt charitable trust not treated as a private for	undation
	527 political organization	
Form 990-PF	X 501(c)(3) exempt private foundation	
	4947(a)(1) nonexempt charitable trust treated as a private foundate	ation
	501(c)(3) taxable private foundation	
, ,	s covered by the General Rule or a Special Rule . (7), (8), or (10) organization can check boxes for both the General Rule and a	Special Rule See
General Rule		
	on filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 y one contributor. Complete Parts I and II	or more (in money or
Special Rules		
sections 509(a)(1	(c)(3) organization filing Form 990 or 990-EZ that met the 331/3% support te) and 170(b)(1)(A)(vi), and received from any one contributor, during the yea 2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, lin	ar, a contribution of the greater
the year, aggrega	(c)(7), (8), or (10) organization_filing Eorm_990-or_990-EZ-that-received-from te contributions of more than \$1,000 for use <i>exclusively</i> for religious, charitat ises, or the prevention of cruelty to children or animals. Complete Parts I, II, a	ble, scientific, literary, or
the year, contributing aggregate to more year for an exclusive applies to this org	(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from tions for use <i>exclusively</i> for religious, charitable, etc., purposes, but these cole than \$1,000. If this box is checked, enter here the total contributions that vively religious, charitable, etc., purpose. Do not complete any of the parts unleading anization because it received nonexclusively religious, charitable, etc., contributions.	intributions did not were received during the less the General Rule ributions of \$5,000 or more
990-EZ, or 990-PF), but it m	at is not covered by the General Rule and/or the Special Rules does not file Soust answer "No" on Part IV, line 2 of its Form 990, or check the box on line Here, to certify that it does not meet the filing requirements of Schedule B (Fo	H of its Form 990-EZ,
	eduction Act Notice, see the Instructions Schedule	B (Form 990, 990-EZ, or 990-PF)

Name of organization THE HERSON-STIRMAN FAMILY FOUNDATION, INC.

Employer identification number 52-2279879

alti	Contributors (See instructions)		
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	JOSEPH AND SONIA HERSON 1111 23RD STREET NW WASHINGTON, DC 20037	\$\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(<u>a</u>) No.	(b)	Aggregate contributions	Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)

Name of organization THE HERSON-STIRMAN FAMILY FOUNDATION, INC.

Employer Identification number 52-2279879

Part II Noncash Property (see instructi

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	ISRAEL BONDS	\$	VAR
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
–-(a)-No. – from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

JSA 9E1254 1 000

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES

DESCRIPTION

TUUOMA

TOTAL

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

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS
M&T INVESTMENT FOREIGN INTEREST INCOME OTHER INTEREST INCOME TAX EXEMPT INTEREST		12,789. 4,907. 860. 4,167.
	т∩тат.	22.723

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

REVENUE AND EXPENSES

DESCRIPTION

PER BOOKS

M&T INVESTMENT - ORDINARY DIVIDE ALLFIRST TRUST COMPANY - NONTAXABLE DIVI 26,583. 550.

TOTAL

27,133.

52-2279879

CHARITABLE PURPOSES

ADJUSTED NET INCOME

NET INVESTMENT INCOME

EXPENSES PER BOOKS

REVENUE

- LEGAL FEES

PART I

FORM 990PF,

0

1,575.

TOTALS

WHITEFORD, TAYLOR & PRESTON PROFESSIONAL SERVICES

DESCRIPTION

1,575.

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PART I

FORM 990PF,

	CHARITABLE PURPOSES		0	
	ADJUSTED NET INCOME		0	
	NET INVESTMENT INCOME		0	
	REVENUE AND EXPENSES PER BOOKS	2,725.	2,725.	
- ACCOUNTING FEES		RATION	TOTALS	

REZNICK GROUP TAX RETURN PREPARATION

DESCRIPTION

4

FORM 990PF, PART I - TAXES

REVENUE AND EXPENSES

DESCRIPTION

PER BOOKS

FOREIGN TAX PAID

61.

TOTALS

6<u>1.</u>

DESCRIPTION TRUSTEE FEES -

ADMIN

MANAGEMENT FEES-

ATTACHMENT 6

FORM 990PF, PART I - OTHER EXPENSES

REVENUE AND **EXPENSES**

PER BOOKS 883.

6,394.

1,304.

TOTALS

8,581.

THE HERSON-STIRMAN FAMILY

AND STATE OBLIGATIONS - U.S. PART II

DESCRIPTION

FORM 990PF,

U.S. GOVERNMENT OBLIGATIONS

US OBLIGATIONS TOTAL

ATTACHMENT

ATTACHMENT 7

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PAGE 24

THE HERSON-STIRMAN FAMILY

1,178,590.

990,181.

ENDING FMV

ENDING BOOK VALUE

1,178,590.

990,181.

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PAGE 25

THE HERSON-STIRMAN FAMILY

549,287.

ENDING FMV

549,287.

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504,		29-200603-01
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TOTALS		10:39:
REIGN BONDS		3/15/2010
ઝ		7 2337
CORPORA		RX1737
	FOREIGN BONDS 504,360.	# FOREIGN BONDS TOTALS TOTALS 504,360.

29-200603-01 RX1737 2337

ATTACHMENT 11 - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES TİTLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION PRES/TREAS VP/SEC/DIR DİRECTOR PART VIII C/O THE FOUNDATION C/O THE FOUNDATION C/O THE FOUNDATION CAROLE H MARTIN NAME AND ADDRESS JOSEPH L HERSON SONIA S HERSON FORM 990PF,

GRAND TOTALS

DIRECTOR

C/O THE FOUNDATION

LYNN H GRAD

DİRECTOR

GAIL HERSON C/O THE FOUNDATION

ATTACHMENT 11

FORM 990PF, PART XV - INFORMATION REGARDING FOUNDATION MANAGERS

JOSEPH L HERSON SONIA S HERSON

	-

THE HERSON-STIRMAN FAMILY

52-2279879

NT 13	Elizabeth and the second	AMOUNT:	000,008	80,000			
ATTACHMENT 13	returning to mixed to about it	FORCAS OF GRANT OR CONTENSITION		TOTAL CONTRIBUTIONS FAID			
ONS PAID DURING THE YEAR	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND POLINDARY CHAMIC OF DESTROY	COUNTIES OF RECEPTION				 	
FORM 990PF, PART AV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR	DESTORME AND ANDERSO	מבשעמע מיים הואין ואבוויאים א	VARIOUS CHARITIES-SEE ATTACHED				

ATTACHMENT 13 PAGE 30

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SCHEDULE D · (Form .1041)

Capital Gains and Losses

Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).

► Attach to Form 1041, Form 5227, or Form 990-T. See the instructions for

OMB No 1545-0092

2009

Department of the Treasury Internal Revenue Service Name of estate or trust

THE HERSON-STIRMAN FAMILY

Employer identification number

52-2279879 FOUNDATION, INC. Note: Form 5227 filers need to complete only Parts I and II Short-Term Capital Gains and Losses - Assets Held One Year or Less Part I (e) Cost or other basis (f) Gain or (loss) for (a) Description of property (Example 100 shares 7% preferred of "Z" Co) (b) Date acquired (c) Date sold the entire year Subtract (e) from (d) (see page 4 of the (d) Sales price (mo, day, yr) (mo, day, yr) instructions) 1a -20,108.b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b 1 b Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts 3 Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2008 Capital Loss 4 Net short-term gain or (loss). Combine lines 1a through 4 in column (f) Enter here and on line 13, -20,108. column (3) on the back. Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year (e) Cost or other basis (f) Gain or (loss) for (a) Description of property (Example 100 shares 7% preferred of "Z" Co) (b) Date acquired (c) Date sold (see page 4 of the instructions) the entire year Subtract (e) from (d) (d) Sales price (mo, day, yr) (mo, day, yr) 6a -85,309. b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b 6 b Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts 8 4,680. 9 Gain from Form 4797, Part I 10 10 Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2008 Capital Loss 11 Net long-term gain or (loss). Combine lines 6a through 11 in column (f) Enter here and on line 14a,

Schedule D (Form 1041) 2009

-80,629.

Schedule D (Form 1041) 2009 Page 2 Summary of Parts I and II Part III (1) Beneficiaries' (2) Estate's (3) Total or trust's Caution: Read the instructions before completing this part. (see page 5) -20,108. 13 Net short-term gain or (loss) 14 Net long-term gain or (loss): -80,629. 14a b Unrecaptured section 1250 gain (see line 18 of the wrksht) 14b 14c -100,737. Total net gain or (loss). Combine lines 13 and 14a ▶ 15 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 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 3,0004 16 a The loss on line 15, column (3) or b \$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 **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 Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34) Enter the smaller of line 14a or 15 in column (2) 18 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 If the estate or trust is filing Form 4952, enter the 21 amount from line 4g, otherwise, enter -0-22 Subtract line 21 from line 20 If zero or less, enter -0-22 Subtract line 22 from line 17 If zero or less, enter -0-23 23 Enter the smaller of the amount on line 17 or \$2,300 24 24 Is the amount on line 23 equal to or more than the amount on line 24? 25 Yes. Skip lines 25 and 26, go to line 27 and check the "No" box No. Enter the amount from line 23....... 25 26 26 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 Enter the amount from line 26 (If line 26 is blank, enter -0-) 28 Subtract line 28 from line 27 29 Figure the tax on the amount on line 23 Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule Ginstructions in the instructions for Form 1041) 32 Figure the tax on the amount on line 17 Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule Ginstructions in the instructions for Form 1041)....... 33

G, line 1a (or Form 990-T, line 36). .

Tax on all taxable income. Enter the smaller of line 32 or line 33 here and on Form 1041, Schedule

THE HERSON-STIRMAN FAMILY
FORM 990-PF - PART IV

Kind of F				ription	oi 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)	
			TAL GAIN DI		3	4,680.	
78,854.		M&T TRUST - 98,962.	ATTACHED			VAR -20,108.	VAI
24,138.		M&T TRUST 459,645.	ATTACHED			VAR -35,507.	VA
4,155.		M&T - KKR : 56,284.	FINANCIAL H	OLDINGS LLC	C ATTA	VAR -52,129.	VA
2,327.		TYCO INTERI	NATIONAL SE'	PTLEMENT		VAR 2,327.	VA
TAL GAIN(L	oss)						
			. 				

Itemized Payees - Last year:2 1/1/2009 through 12/31/2009

0,6,0040		1 6007/1/1	1/1/2009 tnrougn 12/3 1/2009	מ			Page 1
Z/3/ZU IU Date	Account	Num	Category	Tag	Memo	ਹੱ	Amount
EXPENSES							\$80,000.00
American Jewish World Service	Service						-5,000.00
Bread For The City							-5,000.00
California Association Of Food Banks	f Food Banks						-5,000.00
Capital Area Food Bank							-5,000.00
Communities In Schools - Dallas	- Dallas						-2,500.00
Dallas SPCA							-1,500.00
Fisher House Foundation							-2,000.00
Friends Of The Israel Defense Forces	fense Forces						-10,000.00
Friends of United Hatzalah							-10,000.00
Heska Amuna Synagogue	 •						-2,000.00
Home Of The Sparrow							-2,000.00
International Rescue Committee	mmittee						-3,500.00
Israel Guide Dog Center For The Blind	For The Blind						4,000.00
Knoxville Museum Of Art							-2,500.00
Montgomery College Foundation	Indation						-5,000.00
National Resources Defense Council	nse Council						-10,000.00
Philabundance							-5,000.00

2009 Tax Information Statement

Account Number:	Recipient's Tax ID number:	Payer's Federal ID number:	Questions?	Corrected
_			Payer's Name and Address	MANUFACTURERS AND TRADERS TRUST COMPANY

2nd TIN notice

(716)842-5682

77312 XX-XXX9879 16-0538020

1704 VANDER RIDGE LANE HERSON-STIRMAN FAMILY Recipient's Name and Address KNOXVILLE, TN 37919 FOUNDATION

2009 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

BALTIMORE, MD 21203

PO BOX 1596

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

ē ķ			Date Nonined	Date:Of	Stocks Bords end	de Bose	A Ner Cardia	Federal Incomes Tex Withheld
(<i>Box 5</i>) (<i>Box 1b</i>) (<i>Box 7</i> Short Term Sales Reported on 1099-B 10000.0000 45505LSY5 INDIAN	(Box 5) (Box 1b) (Box 7) hort Term Sales Reported on 1099-B 10000.0000 45505LSY5 INDIANA ST HFA 5.000% 1/01/34	J% 1/01/34	(<i>Box 1a</i>) 10/20/2008 01/01/2009	(Box 1a) 01/01/2009	(<i>Box 2</i>) 10,000.00	9,200.00	800.00	(Box 4) 0.00
2000.0000 78442P106	SLM CORPORATION		VARIOUS	02/26/2009	9,802.91	38,984.70	-29,181.79	0.00
	JER INVESTORS TRUST INC	T INC	01/30/2009 03/04/2009	03/04/2009	174.54	1,314.13	-1,139.59	0.00
5000,0000 57419PDJ5	MARYLAND ST CCAD 6,000% 3/01/4	5,000% 3/01/41	01/13/2009 03/04/2009	03/04/2009	5,000.00	4,933.00	67.00	0.00
.6881 46614H400	JER INVESTORS TRUST INC	T INC	01/30/2009	03/10/2009	0.70	5.87	-5.17	0.00
1000.0000 16678M207	CHEVY CHASE PFD CAP SER A 10.37E	P SER A 10.375		03/30/2009	1,282.50	0.00	1,282.50	0.00
5000.0000 45505LSY5	INDIANA ST HFA 5.000% 1/01/34	1/01/34	10/20/2008 07/01/2009	07/01/2009	5,000.00	4,600.00	400.00	0.00
50000.0000 929043AE7	VORNADO REALTY TRUST 3.625% 11/15/26	µ ST 3.625%	VARIOUS	09/11/2009	47,593.75	39,925.00	7,668.75	0.00
Total Short Term Sales Reported on 1099-8	rted on 1099-8				78,854.40	98,962.70	-20,108.30	0.00
Long Term 15% Sales Reported on 1099-B 50000,0000, 434123AT2 HOBOKEN	ong Term 15% Sales Reported on 1099-B 50000,0000 434123AT2 HOBOKEN NJ MHA 5,440%, 7/01/09	40% 7/01/09	06/22/2007 02/06/2009	02/06/2009	50,375.00	49,850.00	525.00	0.00
25000.0000 055411AE2	BF SAUL REIT 7.500% 3/01/14	3/01/14	VARIOUS	03/05/2009	129,687.50	123,937.50	5,750.00	0.00
0.0000 46614H400	150,0000 46614H400 JER INVESTORS TRUST INC	T INC	11/06/2006	03/04/2009	170.01	27,105.00	-26,934.99	0.00
75000.0000 166779AA6	CHEVY CHASE BANK 6,875% 12/01/	.875% 12/01/13	VARIOUS	03/30/2009	77,578.13	75,281.25	2,296.88	0.00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

2009 Tax Information Statement

Account Number:
Recipient's Tax ID number:
Payer's Federal ID number:
Questions?

Payer's Name and Address
MANUFACTURERS AND TRADERS TRUST COMPANY

BALTIMORE, MD 21203

PO BOX 1596

77312 XX-XXX9879 16-0538020 (716)842-5682

Recipient's Name and Address
HERSON-STIRMAN FAMILY
FOUNDATION
1704 VANDER RIDGE LANE
KNOXVILLE, TN 37919

derak come Hav Gheld Box 4)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	00.0	30	.85	,55	.36	1.44	.45	.46
	1,266.00	-109.30	-7,667.85	-1,560.55	7,650.36	7,148.44	-23,871,45	-35,507.46
50	00	30	00	.56	50	79	54	4.
Orber Ba	50,290.00	10,109.30	44,360.00	21,479.56	9,224.50	3,070.79	44,937.54	459,645.44
	00.	00	15	.0.	86	23	60.	86
Stocks Boards effor	51,556.00	10,000.00	36,692.15	19,919,01	16,874.86	10,219.23	21,066.09	424,137.98
	5003	5009	2009	5003	5009	5009	5009	
Bate of Sale	03/30/	07/01/	10/01/	10/01/	10/14/	11/24/	11/24/2009	
Bate Bate of Koguired - Sale	01/08/2008 03/30/2009	09/05/2003 07/01/2009	03/23/2001 10/01/2009	10/16/2003 10/01/2009	05/09/2008 10/14/2009	04/04/2006 11/24/2009	/ARIOUS	
		7/01/13						
	P SER A 10	5.170%	RATED	۵	z	ORPORAT		
	SE PFD CA	A REFA COI	C INCORPO	ALTH GROU ATED	RPORATIO	IPUTER INC	RPORATION	8-66
Description (Box 7)	CHEVY CHASE PFD CAP SER A 10.375 PFD	CALIFORNI	MEDTRONIC INCORPORATED	UNITEDHEALTH GROUP INCORPORATED	CERNER CC	APPLE CON	ST JOE CO	ported on 1(
Number Of Shares CUSIP Bescription (180x 5) (180x 11b) (180x 7)	1000.0000 16678M207	10000,0000 130570CG7 CALIFORNIA REFA COP 5,170% 7/01/13	1000,0000 585055106	24P102	200,0000 - 156782104 CERNER CORPORATION	50.0000 037833100 APPLE COMPUTER INCORPORATED	800.0000 790148100 ST JOE CORPORATION	Total Long Term 15% Sales Reported on 1099-8
(CU)	000 166	000 130	000 585	800.0000 91324P102	000 - 156	200 037	000 790	g Term 1!
Numb office Stares	1000.0	10000.0	1000.0	800.0	200.0	50.0	800.0	Total Lon

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

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STATEMENT OF TRANSACTIONS 05/01/09 THROUGH 05/31/09 HERSON-STIRMAN FAMILY FDN, IC

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PAGE

TAX COST				50,000.00	1,425.94-	56,284.00-	8,718.61
PRINCIPAL CASH				50,000.00-		4,155.04	8,718.61-
INCOME CASH	429.00	906.25	500.00				00.00
	60	5/15/09	2/09			NC.	CLES
TRANSACTION DESCRIPTION	CASH RECEIPT OF DIVIDEND EARNED ON PROCTER & GAMBLE CO COM \$0.440000/SHARE ON 975 SHARES DUE 5/15/09	CASH RECEIPT OF INTEREST EARNED ON VORNADO REALTY TRUST 3.625% 11/15/26 \$0.018125/%1 PV ON 50,000 PAR VALUE DUE 5/15/09	CASH RECEIPT OF DIVIDEND EARNED ON GENERAL MARITIME CORP \$0.500000/SHARE ON 1,000 SHARES DUE 5/22/09	PURCHASED 50,000 PAR VALUE OF MAINE ELA TRADE DATE 5/21/09 PURCHASED THROUGH DAIN RAUSCHER INC. 50,000 PAR VALUE AT 100 %	FED BASIS OF GENERAL MARITIME CORP ADJUSTED BY \$1,425.94. OLD: \$23,652.50 /NEW: \$22,226.56 2008 ROC - MERGED CUSIP G04899103	SOLD 2,985 SHARES OF KKR FINANCIAL HOLDINGS LLC TRADE DATE 5/22/09 SOLD THROUGH CITIGROUP GLOBAL MARKETS INC. PAID \$29.85 BROKERAGE 2,985 SHARES AT \$1.402	TOTAL PURCHASES OF CASH MANAGEMENT VEHICLES
DATE	05/15/09	05/15/09	05/26/09	05/27/09	05/27/09	05/28/09	



1001965 000008/000021 0021679

60,688.50-

0.00

TOTAL SALES OF CASH MANAGEMENT VEHICLES

ENDING BALANCE

1,623,057.11

656,439.48-60,688.50

656,439.48

SCHEDULE D4 (Form ,1041)

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

Department of the Treasury Internal Revenue Service Name of estate or trust

THE HERSON-STIRMAN FAMILY

Employer identification number 52-2279879

THE HERSON-STIRMAN FAMILY				32-22/96/9	
art I Short-Term Capital Gains ar	nd Losses - Asse	ts 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)
M&T TRUST ATTACHED			78,854.	98,962.	-20,108
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	-				
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			-		
	<u>-</u>				
				-	
	 		-	 	
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Schedule D-1 (Form 1041) 2009

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

Page 2

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				(a) Cook or all as her	
(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)
M&T TRUST ATTACHED			424,138.	459,645.	-35,507
M&T - KKR FINANCIAL					
HOLDINGS LLC ATTACHED			4,155.	56,284.	-52,129
TYCO INTERNATIONAL					
SETTLEMENT		_	2,327.		2,327
			-		
			'		
	-				
	<u> </u>				
					
-					
		<u> </u>	<u> </u>		-85,309