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## Form 990-PF

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

OMB No 1545 0052

2009

Department of the Treasury Internal Revenue Service Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements For calendar year 2009, or tax year beginning , 2009, and ending G Check all that apply: Initial return Initial Return of a former public charity Final return Amended return Address change Name change Employer identification number Use the RICHARD & SHELLEY BIRNBAUM FAMILY IRS label. 54-6480217 Otherwise, FOUNDATION В Telephone number (see the instructions) print 9020 STONY POINT PKWY #185 804 272 7899 or type RICHMOND, VA 23235 See Specific If exemption application is pending, check here Instructions D 1 Foreign organizations, check here 2 Foreign organizations meeting the 85% test, check Check type of organization: |X| Section 501(c)(3) exempt private foundation here and attach computation Section 4947(a)(1) nonexempt charitable trust | Other taxable private foundation If private foundation status was terminated Fair market value of all assets at end of year Accounting method: X Cash under section 507(b)(1)(A), check here . (from Part II, column (c), line 16) Other (specify) If the foundation is in a 60-month termination 266,796. (Part I, column (d) must be on cash basis.) under section 507(b)(1)(B), check here Part | Analysis of Revenue and (d) Disbursements (a) Revenue and (b) Net investment (c) Adjusted net Expenses (The total of amounts in expenses per books ıncome for charitable columns (b), (c), and (d) may not necessarily equal the amounts in column (a) purposes (cash basis only) (see the instructions).) 545 Contributions, gifts, grants, etc, received (att sch) X if the foundn is not req to att Sch B 2 Interest on savings and temporary cash investments 504 504 504 Dividends and interest from securities. 5a Gross rents b Net rental income 2,748 6a Net gain/(loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a Ö 2,748 Capital gain net income (from Part IV, line 2) O Net short-term capital gain Income modifications 10 a Gross sales less returns and allowances . OGDEN c Gross profit/(loss) (att sch) Other income (attach schedule) 12 Total. Add lines 1 through 11 4.797 3,252 504 0 13 Compensation of officers, directors, trustees, etc 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees (attach schedule) 1,545 1,545. **b** Accounting fees (attach sch) SEE ST 1 c Other prof fees (attach sch) . 17 Interest Taxes (attach schedule)(see instr.) SEE STM 2 964 19 Depreciation (attach sch) and depletion ١ 20 Occupancy . 21 Travel, conferences, and meetings Printing and publications. 23 Other expenses (attach schedule) Total operating and administrative expenses. Add lines 13 through 23. 2,509 1,545 59,908 Contributions, gifts, grants paid PART XV 59,908 Total expenses and disbursements. 0 59,908 62,417 1,545 Add lines 24 and 25 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements -57,620 1,707 **b** Net investment income (if negative, enter 0) 504. C Adjusted net income (if negative, enter -0)

Part	II	Balance Sheets  Attached schedules and amounts in the description column should be for end of year amounts only	Beginning of year	End o	f year
Leir	# 1	(See instructions )	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash — non-interest-bearing			
	2	Savings and temporary cash investments	52,256.	50,079.	51,079.
	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 the instructions)			
_	7	Other notes and loans receivable (attach sch)			
Ą		Less: allowance for doubtful accounts ▶			
A S E T	8	Inventories for sale or use			
E	9	Prepaid expenses and deferred charges			
Ś	10 a	Investments — U.S. and state government obligations (attach schedule)			
	l b	Investments — corporate stock (attach schedule)	341,092.	286,307.	215,717.
	ه	: Investments — corporate bonds (attach schedule)			
	11	Investments – land, buildings, and equipment: basis			
	1	Less: accumulated depreciation (attach schedule)			
	12	Investments – mortgage loans			
	13	Investments – other (attach schedule)			
	14	Land, buildings, and equipment, basis ►			
		Less accumulated depreciation (attach schedule)			
	15 16	Other assets (describe Total assets (to be completed by all filers —	393,348.	336,386.	266,796.
$\overline{}$	17	see instructions. Also, see page 1, item l)	393,340.	330,300.	200,730.
ī	18	Accounts payable and accrued expenses			,
A B	19	Grants payable			·
ĭ	20	Loans from officers, directors, trustees, & other disqualified persons			
ᅡ	21	Mortgages and other notes payable (attach schedule)			
Ţ	22	Other liabilities (describe			
F	~~	Other habilities (describe			
_ E _ S	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
NF	24	Unrestricted .			
E U	25	Temporarily restricted .			
D	26	Permanently restricted			
A B S A L T A		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
ĒL	27	Capital stock, trust principal, or current funds	393,348.	336,386.	
SNC	28	Paid-in or capital surplus, or land, building, and equipment fund			
O E	29	Retained earnings, accumulated income, endowment, or other funds.			
RS	30	Total net assets or fund balances (see the instructions)	393,348.	336,386.	
	31	Total liabilities and net assets/fund balances (see the instructions).	393,348.	336,386.	
Part	TIE .	Analysis of Changes in Net Assets or Fund Balance		300,000.	
				a with	
1	otal	net assets or fund balances at beginning of year — Part II, colur of-year figure reported on prior year's return)	iiii (a), iine 30 (must agre	ee with . 1	393,348.
		r amount from Part I, line 27a .		2	-57,620.
		increases not included in line 2 (itemize).   SEE STATEMENT	3	3	658.
		lines 1, 2, and 3	· <b></b> ·	4	336,386.
		ises not included in line 2 (itemize)		5	
		net assets or fund balances at end of year (line 4 minus line 5)	– Part II, column (b), line	30 6	336,386.

(a) List and describ	e the kınd(s) of property sold (e.g., re se; or common stock, 200 shares ML(	al estate.	(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a 200 SHS WELLPOINT	INC	······································	P	11/19/01	10/08/09
b				127 237 02	10/00/03
С					
d					
е					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	3	(h) Gain or (e) plus (f) m	
a 8,703.		5	, 955.		2,748.
b					
С					
d					
<u>e</u>		<del>" " " " " " " " " " " " " " " " " " " </del>			
	ng gain in column (h) and owned by the	<del></del>		(I) Gains (Colu	ımn (h)
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (over column (j), if any	i) '	gain minus column (k than -0-) or Losses (fr	on column (h))
a					2,748.
b					
С		<del></del>			
d					
<u>e</u>					
2 Capital gain net income or (net	<del></del>	enter in Part I, line 7 er -0- in Part I, line 7	2		2,748.
3 Net short-term capital gain or (k	oss) as defined in sections 1222(5) ar	nd (6):		1	
in Part I, line 8 .	8, column (c) (see the instructions). I	. i i	3		0.
(For optional use by domestic private if section 4940(d)(2) applies, leave the Was the foundation liable for the section if 'Yes.' the foundation does not qualify	is part blank. on 4942 tax on the distributable amor y under section 4940(e). Do not comp	unt of any year in the base pe plete this part.	riod?	Yes	X No
	each column for each year; see the		y entries.		
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use asse	ts (co	<b>(d)</b> Distribution ilumn (b) divided	
2008	72,100.	282	547.		0.255179
2007	4,971.		457.		0.014225
2006	43,835.	187	049.		0.234350
2005	45,632.		249.		0.337393
2004	87,199.	146,	929.	·	0.593477
2 Total of line 1, column (d) .			2		1.434624
	5-year base period — divide the total has been in existence if less than 5 years.		3		0.286925
4 Enter the net value of noncharita	able-use assets for 2009 from Part X,	line 5	4		225,789.
5 Multiply line 4 by line 3			5		64,785.
6 Enter 1% of net investment inco	me (1% of Part I, line 27b)		6		17.
7 Add lines 5 and 6 .			7		64,802.
8 Enter qualifying distributions from	n Part XII, line 4 .		8		59,908.
If line 8 is equal to or greater tha					

	1990-PF (2009) RICHARD & SHELLET BIRNDAUM FAMILT 54-04002.				age 4
Par	Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see the instru	uction	s)_		
1 a	Exempt operating foundations described in section 4940(d)(2), check here				
	Date of ruling or determination letter: (attach copy of letter if necessary - see instr.)				
b	Domestic foundations that meet the section 4940(e) requirements in Part V,		<del></del>		34.
	check here ► and enter 1% of Part I, line 27b				
C	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b).				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable				_
	foundations only. Others enter -0-)				<u>0.</u>
3	Add lines 1 and 2				34.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)				0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-				34.
6	Credits/Payments:				
	2009 estimated tax pmts and 2008 overpayment credited to 2009 . 6a 920.				
	Exempt foreign organizations — tax withheld at source  6b				
	Tax paid with application for extension of time to file (Form 8868)				
_	Backup withholding erroneously withheld				920.
7	Total credits and payments. Add lines 6a through 6d				720.
8			_		0.
10				-	<del></del> 386.
10	1				0.
Dar	Enter the amount of line 10 to be: Credited to 2010 estimated tax  NII-A   Statements Regarding Activities				
				Yes	No
1 a	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?	-	1 a	163	X
		`	-		<del>                                     </del>
Ŀ	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	-	1ь		Х
	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.				
	Did the foundation file Form 1120-POL for this year?	<u> </u>	1 c		X
C	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:	<u>ا</u>			
	(1) On the foundation \$ 0. (2) On foundation managers \$ Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on	0.	- 1		
Ĭ	foundation managers \$ 0.	Į	- 1		1
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	. [	2		ľΧ
	If 'Yes,' attach a detailed description of the activities.		$\neg$		
9	Has the foundation made any changes, not provide the reported to the IPS, in its governing instrument, articles				٠.
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		Х
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		X
	olf 'Yes,' has it filed a tax return on Form 990-T for this year?		4b	N	/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		X
	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	Į.			
	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	ļ
7	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV		7	Χ_	<u> </u>
<b>8</b> a	Enter the states to which the foundation reports or with which it is registered (see the instructions)  VA				
t	of 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		8Ь	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5)		$\exists$		
J	for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? 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	1	_		Х
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Forn	m 990-PF (2009) RICHARD & SHELLEY BIRNBAUM FAMILY 54-648021	7	-	age
	t VII-A Statements Regarding Activities Continued	<u> </u>	·	ugo
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		х
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		Х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website address ► N/A			
14	The books are in care of ► RICHARD S. BIRNBAUM Telephone no. ► 804 2	72 7	899	
	Located at ► 9020 STONY PT PKWY, # 185 RICHMOND VA ZIP + 4 ► 23235			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here	N/A	►	П
	and enter the amount of tax-exempt interest received or accrued during the year			N/I
Par	rt 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
1	a 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?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(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			
ı	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 the instructions)?	1 b	N	/A
	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		Х
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)).			
i	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 ▶ 20 , 20 , 20			
1	<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> 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 the instructions )	2b	N	/A
(	c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			
	► 20 , 20 , 20 , 20			

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?

charitable purposes?

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3ь

N/A

Х

Yes X No

3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?

4a Did the foundation invest during the year any amount in a manner that would jeopardize its

**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.)

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Part VII-B   Statements Regarding Activit	ies for Which Forr	n 4720 May Be Red	uired (continued)		
5a During the year did the foundation pay or incur	any amount to:				
(1) Carry on propaganda, or otherwise attemp	t to influence legislation	n (section 4945(e))?	Yes X	No	
(2) Influence the outcome of any specific publ on, directly or indirectly, any voter registra	ic election (see section tion drive?	4955), or to carry	Yes X	No	
(3) Provide a grant to an individual for travel,	study, or other similar p	ourposes?	Yes X	No	
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section (4)	an a charitable, etc, org 4940(d)(2)? (see instruc	ganization described ctions)	Yes X	No	
(5) Provide for any purpose other than religious educational purposes, or for the prevention	us, charitable, scientific n of cruelty to children o	, literary, or or animals?.	Yes X	No	
<b>b</b> If any answer is 'Yes' to 5a(1)-(5), did <b>any</b> of the described in Regulations section 53.4945 or in (see instructions)?	ne transactions fail to quality a current notice regard	ualify under the exception ing disaster assistance	ons	5b	N/A
Organizations relying on a current notice regar	ding disaster assistance	e check here	. ►		
c If the answer is 'Yes' to question 5a(4), does the tax because it maintained expenditure responsing 'Yes,' attach the statement required by Regulations of the	ibility for the grant?		N/A Yes	No	
6a Did the foundation, during the year, receive an					
on a personal benefit contract?.				No	v
b Did the foundation, during the year, pay premii If 'Yes' to 6b, file Form 8870.	ums, directly or indirect	ly, on a personal benefit	t contract?	6Ы	X
7a At any time during the tax year, was the found	ation a party to a prohit	oited tax shelter transac	tion? Yes X	No	
<b>b</b> If yes, did the foundation receive any proceeds	s or have any net incom	e attributable to the trar	nsaction?	. 7ь	N/A
Part VIII Information About Officers, D	irectors, Trustees	, Foundation Mana	gers, Highly Paid	<b>Employee</b>	s,
and Contractors					<del></del>
1 List all officers, directors, trustees, foundation				T =	<del> </del>
(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 other allo	
RICHARD S. BIRNBAUM	TRUSTEE	0.	0.		0.
10480 CHEROKEE ROAD	0				
RICHMOND, VA 23235-1007					
SHELLEY G. BIRNBAUM	TRUSTEE	0.	0.	·	0.
10480 CHEROKEE ROAD	0			,	
RICHMOND, VA 23235-1007					
2 Compensation of five highest-paid employees	(other than those inclu	ided on line 1— see inst	ructions). If none, ente	r '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 other allo	account, wances
NONE					
			<u> </u>		
					<del></del>
			·		
			 	-	<del></del>
Total number of other employees paid over \$50,000				<u> </u>	0 -PF (2009)

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly and Contractors (continued)	Paid Employ	ees,
3 Five highest-paid independent contractors for professional services — (see instructions). If none, enter 'NONE.'		
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Cor	mpensation
NONE	(3, 33.	
		. <u>.</u>
Total number of others receiving over \$50,000 for professional services.		0
Part IX-A Summary of Direct Charitable Activities	<u></u>	
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.	Ex	penses
1 N/A		
2		
3		
4		<u></u>
Part IX-B Summary of Program-Related Investments (see instructions)		
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.  1 N/A	A	mount
2		
All other program-related investments. See instructions.  3		
Total. Add lines 1 through 3	Form	0.
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Part X   Minimum Investment Return (All domestic foundations must complete this part see instructions.)	Foreign	foundations,
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	176,652.
<b>b</b> Average of monthly cash balances	1ь	52,575.
c Fair market value of all other assets (see instructions)	1c	
d Total (add lines 1a, b, and c)	1d	229,227.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c		
(attach detailed explanation)	.	
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	229,227.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	3,438.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	225,789.
6 Minimum investment return. Enter 5% of line 5	6	11,289.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operand certain foreign organizations check here ► ☐ and do not complete this part XI.		oundations
1 Minimum investment return from Part X, line 6	1	11,289.
2a 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.)		
c Add lines 2a and 2b .	2c	34.
3 Distributable amount before adjustments. Subtract line 2c from line 1.	. 3	11,255.
4 Recoveries of amounts treated as qualifying distributions .	4	
5 Add lines 3 and 4	5	11,255.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	11,255.
Part XII Qualifying Distributions (see instructions)	······	
Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes.  a Expenses, contributions, gifts, etc — total from Part I, column (d), line 26	1a	59,908.
<b>b</b> Program-related investments — total from Part IX-B	1ь	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the: a Suitability test (prior IRS approval required)	. 3a	
<b>b</b> Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	59,908.
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 instructions)	5	
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	59,908.
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whet qualifies for the section 4940(e) reduction of tax in those years.	ner the fou	indation
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### Part XIII Undistributed Income (see instructions)

a Excess from 2005 38,971. b Excess from 2006 35,630. c Excess from 2007 d Excess from 2008 58,883. e Excess from 2009 48,653.		(a) Corpus	(b) Years prior to 2008	<b>(c)</b> 2008	<b>(d)</b> 2009
2. Undertholder score, if any, as of the ead of 2009 a Enter amount for 2008 only b Total for prior years. 20 20 20 3 5 exest phtibitions carpyiner, if any, to 2009 a From 2004					11.255.
a Enter amount for 2000 only b Total for prox graz. 20 _ 20 _ 20 3 Decest distributions carryove, if any, to 2009 a From 2006					11,200.
3 Excest distributions carryover, if any, to 2009 a From 2005 b From 2005 3 3 3, 971. c From 2006 5 5 8, 883. f Total of lines 3a through e 4 Qualifying distributions for 2009 from Part XII, line 4: "\$ 5, 9, 908. a Applied to 2008, but not more than line 2a b Applied to 2008, but not more than line 2a b Applied to 2008, but not more than line 2a c Description of the control of corpus (Election required — see instructions) d Applied to 2009 distributions out of corpus (Election required — see instructions) d Applied to 2009 distributiable amount e Remaining amount distributed out of corpus 5 Excess distributions out of corpus (I an amount appears or column of column (a).)  6 Enter the net total of each column as indicated below: a Corpus Add lines 3f, 4c, and 4s. Subtract line 5 b Prior years' undistributed income. Subtract line 5 c Enter the amount of prior years' undistributed income. Subtract line 45 from line 2b  C Enter the amount of prior years' undistributed income for which a notice of deficiency 444(20) tax has been previously assessed d Subtract line 6c from line 5D. Taxable amount— see instructions  4 Undistributed more for 3008. Subtract line 4 from line 2 all calls amount— see instructions 4 Applied to more for 3008. Subtract line 4 from line 2 line 4 from line 1. This amount must be distribution carryover from 2004 not applied on line 5 or line 7 (see instructions)  9 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)  1 Applied to 10 line 9. 2 Excess from 2009  2 Excess from 2009 4 Excess from 2009 5 Excess from 2009	• •			0.	
3 Excess distributions carryover, if any, to 2009  a From 2005  b From 2005  c From 2006  c From 2007  f From 2006  c From 2008  f Sa, 883.  1 Total of lines 3 at through e  4 Qualifying distributions for 2009 from Part XII, line 4: * \$ 59, 908.  a Applied to 2008, but not more than line 2a  b Applied to 2008, but not more than line 2a  b Applied to undistributed income of pror years (Election required — see instructions)  c Treated as distributions out of corpus (Cleticuth required — see instructions)  d Applied to 2009 distributable amount  re Remaining amount distributed out of corpus (Cleticuth required — see instructions)  5 Excess distributions surpover applied to 200  c Ernet the net total of each column as indicated below:  a Corpus Add line 31, 4e, and 4e. Subtract line 5  b Prior years' undistributed income. Subtract line 5  c Ernet the amount of prior years' undistributions been resulted, or an which the section 4942(a) tax has been previously assessed  d Subtract line 6 from line 6. Taxable amount — see instructions  d Subtract line 6 from line 6. This amount must be distributed in come for 2008. Subtract line 4 drom line 2 at line 4 from line 2 in the come for 2008. Subtract line 4 drom line 2 in the come for 2008. Subtract line 4 drom line 2 in the come for 2008. Subtract line 4 drom line 2 in the come for 2008. Subtract line 4 drom line 1 in this amount must be distribution and amount must be distribution for line 1 in this amount must be distribution for line 1 in this amount must be distributed in 2010  7 Amounts freated as distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)  8 Excess from 2005  8 Excess from 2007  d Excess from 2009  5 Excess from 2009  5 Excess from 2009  5 Excess from 2009  5 Excess from 2009  4 Revess from 2008  5 Excess from 2009	•		0.		
From 2006   38, 971	<del></del>				
## Comparison of Prom 2007  ## From 2007  ## From 2007  ## From 2008  ## From 2008  ## Total of lines 3a through e  ## Coualitying distributions for 2009 from Part XII, line 4:	a From 2004 80, 373.			1	
d From 2008	<b>b</b> From 2005 38, 971.			1	
From 2008   58, 883.   213, 857.   213, 857.   3	<b>c</b> From 2006 . 35, 630.				
1 Total of lines 3 at through   2	<b>d</b> From 2007				
4 Qualifying distributions for 2009 from Part XIII, line 4: F \$ 59,908. a Applied to 2008, but not more than line 2a b Applied to 2008, but not more than line 2a c liciton required — see instructions)  6 Applied to 2009, situ houtbed income of prior years (Election required — see instructions)  7 Applied to 2009 distributible amount — see instructions)  8 Applied to 2009 distributible amount — see instructions)  9 Applied to 2009 distributible amount — see instructions — see instruct	e From 2008 58,883.			1	
XII, line 4:  S 59,908. a Applied to 2008, but not more than line 2a b Applied to undistributed more of prory years (Election required — see instructions) c Treated as distributions out of corpus (Election required — see instructions) d Applied to 2009 distributable amount e Remaining amount distributed out of corpus for an amount appears in column (a).  E Remaining amount distributed out of corpus for an amount appears in column (b).  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(b) tax has been previously assessed d Subtract line 6c from line 6b. Taxable amount — see instructions el Indistributed 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 satisfy requirements imposed by section 170(6)(1)(F) or 4942(g)(3) (see instructions)  8. Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6	f Total of lines 3a through e	213,857.			
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b Applied to undistributed income of prior years (Election required — see instructions)  c Treated as distributions out of corpus (Election required — see instructions)  d Applied to 2009 distributable amount  e Remaining amount distributed out of corpus  5 Exess distributions carryover applied to 2008 (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 Cirpus 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) lax has been previously assessed d.  d Subtract line 6c from line 6b. Taxable amount — see instructions  d Lindstributed income for 2009. Subtract lines 4d from line 2a Taxable amount — see instructions  1 Lindstributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distribution in 2010.  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(f)(1)(F) or 4942(g)(3) (see instructions)  8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)  9 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)  8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)  9 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)  10 Analysis of line 9.  a Excess from 2005  3 Excess from 2007  d Excess from 2008  5 B, 883.  e Excess from 2009  4 8, 653.	XII, line 4: ► \$59,908.			1	
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Clecton required — see instructions   0.   11,255.			0.		
Clecton required — see instructions   0.   11,255.	c Treated as distributions out of corpus				<del> </del>
e Remaning 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), 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 of proof years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed of Subtract line 6c from line 6b. Taxable amount – see instructions  e Indistributed income for 2008. Subtract line 4 from line 2a Taxable amount – see instructions  f Undistributed income for 2009. Subtract lines 4 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 instructions)  8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)  9 Excess distributions carryover from 2004.  10 Analysis of line 9.  a Excess from 2005  a Excess from 2006  c Excess from 2007  d Excess from 2007  d Excess from 2009  48, 653.	(Election required - see instructions)	0.			
5 Excess distributions carryover applied to 2009 (if an amount appears in column (a), 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 for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d  d Subtract line 6c from line 6b. Taxable amount — see instructions  e lhidistributed income for 2008. Subtract lines 4a from line 2a Taxable amount — see 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)  8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)  8 Excess distributions carryover from 2010. Subtract lines 6 and 182,137.  10 Analysis of line 9.  a Excess from 2005  a Excess from 2006  c Excess from 2006  c Excess from 2008  d Excess from 2009  d Excess from 2009  4 88,653.	d Applied to 2009 distributable amount				11,255.
Compared to the same amount appears or 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 of prior years' undistributed income. Subtract line 4b from line 2b	e Remaining amount distributed out of corpus	48,653.			
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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   O.	a Corpus Add lines 3f, 4c, and 4e. Subtract line 5	262,510.			
ed 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 instructions  e Undistributed income for 2008. Subtract line 4a from line 2a Taxable amount — see 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 instructions)  8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)  9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a			0.		
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Inne 2a Taxable amount — see instructions	a Undustributed income for 2009. Subtract line 4a from				
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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 instructions)  8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)  9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a					
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corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)					0.
by section 170(b)(1)(F) or 4942(g)(3) (see instructions)  8					
(see instructions)       0.         8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)       80,373.         9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a       182,137.         10 Analysis of line 9. a Excess from 2005 b Excess from 2006 c Excess from 2006 d Excess from 2007 d Excess from 2008 e Excess from 2008 d Excess from 2009 d 48,653.       58,883. e Excess from 2009 d 48,653.					
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applied on line 5 or line 7 (see instructions)  9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	8 Excess distributions carryover from 2004 not				
Subtract lines 7 and 8 from line 6a	applied on line 5 or line 7 (see instructions)	80,373.			
Subtract lines 7 and 8 from line 6a	9 Excess distributions carryover to 2010.				
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				1	
	e Excess from 2009 . 48,653.				Form 990 PE (2000)

1a if the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling a selfective for 2009, either the data of the ruling b. Check box to indicate whether the foundation is a private operating foundation described in section   4942(0)(3) or   4942(0)(5) or   494	Part XIV Private Operating Foundati	ions (see instru	ictions and Part	VII-A, question	9)	N/A
b Check box to indicate whether the foundation is a private operating foundation described in Section 4942(j)(3) or 4942(j)(5) 2 Effort the lessor of the adjusted method in the common movement form Part I for the minimum movement form Part I for the minimum movement form Part I for the minimum movement I form Part I for each part is stated of the common form Part I for each year is stated of Amounts neighbor in section 1942 (in 1942) (in 1942	1a If the foundation has received a ruling or our is effective for 2009, enter the date of the	determination letter	that it is a private of	operating foundation,	, and the ruling	
2a Enter the lesser of the adjusted net income from Part I or the minimum more stiment return from Part I or the minimum more stiment return from Part X for by 15% of the 2a county of the 2a co	•	•	rating foundation d	escribed in section	4942(j)(3) or	4942())(5)
westment return from Part X for each year istade b 55% of line 2a Counitying distributions from Part XIII, line 4 for each year lated and the part of			Ţ		<del>1,_1</del> <del>9/1/</del>	
c Covalitying distributions from Part XII, line 4 for each year listed d Amounts nelubda in line 2 and stand discelly for active conduct of exempt schildes e Qualitying distributions made directly. Covalitying distributions made directly. Covalitying distributions made directly. Covalitying distributions made directly. Covality of active conduct of exempt schildes. Subtract line 2d from time 2c. Covality of a covality of the profit. Covality of a covality of a schilder profit. Covality of a schilder distribution of the covality of a covality of a schilder distribution. Covality of a schilder distribution of a covality of a covality of a covality of a schilder distribution of a covality of a co	investment return from Part X for	(a) 2009	<b>(b)</b> 2008	(c) 2007	(d) 2006	(e) Total
Irre 4 for each year isled d Anoust necked in lie 2 not used dereity for active conduct of exempt activities.  Qualitying dishributions made directly for active conduct of exempt activities.  Camplete 3, b, or c for the alternative test relied upon.  a 'Assels' alternative test relied upon.  a 'Assels' alternative test relied upon.  a 'Assels' alternative test relied upon.  b 'Endowment' of assels, qualitying under section 4942(0)(3(B)(0)  b 'Endowment' alternative test – enter 2/3 of minimum investment retirem above in Part X, inc 5 for exhy set lettet  c 'Support' alternative test – enter 2/3 of minimum investment retirem above in Part X, inc 5 for exhy set lettet  c 'Support from general public and 5 or more exempt organization as provided in section 4942(0)(3(B)(0))  (3) Largeel amount of support from an exempt organization as provided in section 4942(0)(3(B)(0))  (3) Largeel amount of support from an exempt organization and acception of the section of the sectio	<b>b</b> 85% of line 2a					
for active conduct of exempt activities  © Qualitying distributions made directly for active conduct of exempt activities. Subtract line 26 from line 27 and the 26 from line 27 and the 27						
Subtract line 2d from line 2c 3 Complete 3a, b. or of or the alternative test relied upon. a 'Assets' attendative test - enter. (1) Value of all assets. (2) Value of sasets qualifying under section 4942(0)(3(8)(6) b 'Endowmen' statemative test - enter 2/3 of maintain investment return shown in Part X, line 6 for early art instal c Support' alternative test - enter. (1) Total support other than gross investment income (interest, on securities loans (section 512(a)(5)), or royalties)  (2) Support from general public and 5 or more exempt organization as provided in section \$43(0)(3)(9)(0)(0)(0)(0)(0)(0)(0)(0)(0)(0)(0)(0)(0)	for active conduct of exempt activities					
alternative test relied upon.  a 'Assets' atternative test — enter.  (1) Value of all assets.  (2) Value of all assets.  (2) Value of assets qualifying under section 4942(p3(p3(p)))  Endowared alternative test — enter 2/3 of minimum investment return above 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 securifies loans (section 512(p(5)), or royaltes)  (2) Support from genal public and 5 or mere enter of support from genal public and 5 or mere enter of support of support of support from an exempt organization as provided in section 492(p3(g)(k)) in "provided")  (3) Largest amount of support from an exempt organization with the support from an exempt organization with the support from an exempt organization flower in the support from an exempt organization with the foundation flower in the support from an exempt organization flower in the flower in the support from an exempt organization flower in the flower in the support from an exempt organization flower in the flower in the flower in the support from an exempt organization flower in the flower in the flower in the flower in the support from an exempt organization flower in the flower i	<ul> <li>Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c</li> </ul>					
(1) Value of all assets (2) Value of assets qualifying under section 4942(0)(3)(5)(5) b Endowment alternative test—enter 2/3 of the control o	3 Complete 3a, b, or c for the alternative test relied upon.					
(2) Value of assets qualifying under section 4942()(3(8)(8)) b Endowment alternative test — enter 2/3 of minimum investment return shown in Part X, line is for each year lasted 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 royalities) (2) Support from general public and 5 or more exempt organization as provided in section \$492(0)(8)(9)(1) (3) Largest amount of support from an exempt organization as provided in section \$492(0)(8)(9)(1) (3) Largest amount of support from an exempt organization as provided in section \$492(0)(8)(9)(1) (3) Largest amount of support from an exempt organization and support from an exempt organization had \$5,000 or more in assets at any time during the year — see instructions.)  1 Information Regarding Foundation Managers: a List any managers of the foundation Managers: a List any managers of the foundation who have contributed more than \$5,000 (See section \$07(0)(2)) SEE STATEMENT 4  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 * X   fthe foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes grifts, grants, etc, (see instructions) to individuals or organizations under other conditions, complete times 2a, b, c, and d.  a The name, address, and telephone number of the person to whom applications should be addressed:  b The form in which applications should be submitted and information and materials they should include:  c Any submission deadlines.						
section 4942()(3(9)(6))  b Tadowmed Ilbrandus teat — embt 2/3 of minimum investment return shown in Part X, time for each year Intate  c Support alternative test — enter.  (1) Total support other than gross investment income (interest, duvidends, rents, payments on securities loans (section 512(a)(5)), or royalities)  (2) Support from general public and 5 or more exempt organizations as provided in section 4942(i)(3(8)(6)), or royalities)  (3) Largest amount of support from an exempt organization sa provided in section 4942(i)(3(8)(6)), or royalities)  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 (tot only if they have contributed more than 55,000). (See section 507(d)(2).)  SEE STATEMENT 4  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 *	` <b>'</b>					
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 royalities)  (2) Support from general public and 5 or more exempt organizations as provided in section 494(0)(3)(8), in cryopathes)  (3) Largest amount of support from an exempt organization had \$5,000 or more in assets at any time during the year — see instructions.)  1 Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than \$5,000). (See section 507(d)(2).)  SEE STATEMENT 4  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 * Mill if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc, (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.  b The form in which applications should be submitted and information and materials they should include:  c Any submission deadlines.	section 4942(j)(3)(B)(i)					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalities)  (2) Support from general public and 5 or more earned regardings as provided in section 492(0)(3(8)(iii))  (3) Largest amount of support from an an abundant of support from an exempt organization (4) Gross investment income  Part XV   Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year — see instructions.)  1. Information Regarding Foundation Managers: a lust any managers of the foundation who have contributed more than \$5,000). (See section 507(d)(2).)  SEE STATEMENT 4  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 * [X] if the foundation makes gifts, grants, etc, (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d. a The name, address, and telephone number of the person to whom applications should be addressed:  d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:  d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:	minimum investment return shown in Part X,					
investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalhes)  (2) Support from general public and 5 or more exempt organizations as provided in section 4942(i)(3)(8)(iii)  (3) Largest amount of support from an exempt organization of support from an exempt organization (Complete this part only if the organization had \$5,000 or more in assets at any time during the year — see 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 lax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)  SEE STATEMENT 4  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 * X   If the foundation makes gifts, grants, etc, (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.  b The form in which applications should be submitted and information and materials they should include:  c Any submission deadlines.	c 'Support' alternative test - enter.					
(2) Support from general public and 5 or more exempt organizations as provided in section \$42(0)(5)(0)(1)(1)(3)  Largest amount of support from an exempt organization of support from an exempt organization (4) Gross investment income  Part XV   Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year — see instructions.)  1 Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than \$5,000). (See section 507(d)(2).)  SEE STATEMENT 4  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   X  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes grifs, grants, etc, (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.  a The name, address, and telephone number of the person to whom applications should be addressed:  b The form in which applications should be submitted and information and materials they should include:  c Any submission deadlines.	investment income (interest, dividends, rents, payments on securities loans (section					
an exempt organization  (4) Gross investment income  Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year — see 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).)  SEE STATEMENT 4  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 \(^{\text{NONE}}\) If the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc, (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.  a The name, address, and telephone number of the person to whom applications should be addressed:  b The form in which applications should be submitted and information and materials they should include:  c Any submission deadlines.  d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:	(2) Support from general public and 5 or more exempt organizations as provided					
Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year — see 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).)  SEE STATEMENT 4  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 ▶ X if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc, (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.  a The name, address, and telephone number of the person to whom applications should be addressed:  b The form in which applications should be submitted and information and materials they should include:  c Any submission deadlines.	(3) Largest amount of support from an exempt organization					
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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 \( \subseteq \) if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc, (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.  a The name, address, and telephone number of the person to whom applications should be addressed:  b The form in which applications should be submitted and information and materials they should include:  c Any submission deadlines.  d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:	close of any tax year (but only if they have	have contributed me e contributed more	ore than 2% of the t than \$5,000). (See	total contributions re section 507(d)(2).)	ceived by the found	ation before the
Check here X if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.  a The name, address, and telephone number of the person to whom applications should be addressed:  b The form in which applications should be submitted and information and materials they should include:  c Any submission deadlines.  d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:	a partnership or other entity) of which the				lly large portion of th	ne ownership of
Check here  X if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.  a The name, address, and telephone number of the person to whom applications should be addressed:  b The form in which applications should be submitted and information and materials they should include:  c Any submission deadlines.  d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:	2 Information Regarding Contribution Gran	ot Gift Loan Schol	arshin etc Program			
a The name, address, and telephone number of the person to whom applications should be addressed:  b The form in which applications should be submitted and information and materials they should include:  c Any submission deadlines.  d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:	Check here X if the foundation only requests for funds. If the foundation make	makes contributions	to preselected cha	ritable organizations		
c Any submission deadlines.  d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:		er of the person to	whom applications s	should be addressed	: •	
c Any submission deadlines.  d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:						
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:	<b>b</b> The form in which applications should be :	submitted and infor	mation and materia	ls they should includ	e:	<del></del>
	c Any submission deadlines.			· · · · · · · · · · · · · · · · · · ·		
DAA TEEA02101 07/06/00 Form 000 DE (2000	d Any restrictions or limitations on awards, s	such as by geograp	hıcal areas, charıta	ble fields, kınds of ın	stitutions, or other f	actors:
TELANZIAI AZINEINA EAMA DUILDE / JANG	DAA			·		Comp 000 DE (2000)

Page 11

3 Grants and Contributions Paid During the Yea	r or Approved for Futu	re Paymen <u>t</u>		
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
	substantial contributor	recipient		
Name and address (home or business)  a Paid during the year SEE STATEMENT 5	any foundation manager or substantial contributor	recipient	contribution	Amount
Total			<b>⊳</b> 3a	59,908.
<b>b</b> Approved for future payment	· · · · · · · · · · · · · · · · · · ·	<u> </u>		35,500.
Total			. ► 3b	<u> </u>

### Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.		Unrelate	ed business income	Excluded	by section 512, 513, or 514	<del></del>		
Program service revenue:		(a) Business code	<b>(b)</b> Amount	(c) Exclu- sion code	<b>(d)</b> Amount	(e) Related or exempt function income (see the instructions)		
a	·							
ь								
c			<del></del>	-		<u></u>		
d		<b> </b>				_ <del></del>		
e				<del>   </del>				
g Fees and contracts from gove	rnment agencies			╁╌┈╁				
2 Membership dues and assess	=			1				
3 Interest on savings and temporary cas				<del>   </del>				
4 Dividends and interest from s				14	504.			
5 Net rental income or (loss) from			***************************************					
a Debt-financed property				1				
<b>b</b> Not debt-financed property				1				
6 Net rental income or (loss) from pers								
7 Other investment income .					· -			
8 Gain or (loss) from sales of assets of	her than inventory			14	2,748.			
9 Net income or (loss) from spe	ecial events							
10 Gross profit or (loss) from sal	les of inventory							
11 Other revenue:								
a		1						
b		_						
c								
d								
e					2.050	<u> </u>		
12 Subtotal. Add columns (b), (c				<u> </u>	3,252.	3,252.		
13 Total. Add line 12, columns (			·	•	13	3,232.		
13 Total. Add line 12, columns ( (See worksheet in the instructions	for line 13 to verify cal					3,232.		
	for line 13 to verify cal					3,232.		
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo				
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			
13 Total. Add line 12, columns ( (See worksheet in the instructions)  Part XVI-B Relationship of  Line No.  Explain below how each  accomplishment of the	for line 13 to verify cald of Activities to the	Accompl	ishment of Exemp	t Purpo	ses			

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

													ŀ	Yes	No
	descr	ne organization on the organization of the org	501(c) of	f the Code (ot	ngage in an her than se	y of the follow ction 501(c)(3)	ring with a ) organiza	iny oth itions)	er orga or in s	anization ection 52	7,			- 22	
		fers from the re	-		a noncharit	able exempt o	organizatio	n of.							
	<b>(1)</b> C					•							1a(1)		Х
	(2) 0	ther assets											1a (2)		X
	<b>b</b> Other	transactions.													
	<b>(1)</b> S	ales of assets to	o a nonc	haritable exe	mpt organiz	ation							1 b (1)	] ]	Х
		urchases of ass											1b (2)		Х
		tental of facilities			•								1b (3)		Х
	• •	deimbursement a		•									1b (4)		X
	(5) L	oans or loan gua	arantees	s , .									1b (5)		X
		erformance of s			ip or fundra	ising solicitati	ons .						1b (6)		X
	• •	ng of facilities, e			•	•		5					1c		X
				_		-									
	the q	answer to any c oods, other asse ransaction or sha	ets, or se	ervices given	by the repo	rtıng foundatio	on. If the f	founda	ition re	ceived le	ss than f	aır marke	t value in	∌ of	
(a	a) Line no.	(b) Amount inv				e exempt organiza							sharing arrai	ngement	s
N	/A					, , , , , ,									
	•				•										
												·			
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	descr	foundation dire	501(c) of	f the Code (ot	ated with, or her than se	related to, or ction 501(c)(3)	ne or more )) or in se	e tax-e ction 5	exempt 527?	organiza	tions	-	Yes	s X	No
	b It Ye	s,' complete the			1 // //				1		\ D				
NT.	/7\	(a) Name of org	ganizatio	on .	(b)	Type of organ	nization		-	(0	) Descrip	otion of re	ationship		
Ŋ	/A	<del></del>													
												•			
_							-								
					_										
_	Under non	tto of popular I doctor	re that I have	ve exempled this re	hen including a	ecompany cohoc	fular and state	amants :	and to the	best of my	knowledge a	nd belief it is	true correct a		
	complete.	lties of penury, I decla Declaration of penar	er (other th	han taxpayer or fi	duciary) is base	ed on all information	on of which p	reparer	1 1			_	due, correct, a	n <b>u</b>	
;	<b> </b>	11	γ —					<u>ାଧ</u>	136	<u> 2010                                   </u>	<u> </u>	PUSTEE			
<u> </u>	Signa	ature of officer or trus	stee		_			Date	<u> </u>		Title				
	Paid	Preparer's signature	Bi	ı				Date	13(10	•	Check if self- employed		parer's Identify Signature in		
:	Pre- parer's	Firm's name (or	ROSET	LINE-KARI	DES ASS	OXIATES.	LLC	<u> IVI</u>	· /) \ \		EIN ►	N/A	**	<del></del>	
1	Use	Firm's name (or yours if self-		WEST GRE		RD SUIT				-	Z04	14/ II			<del></del>
	Only	employed), address, and ZIP code		NIA BEAC		3451-150					Phone no	► (7 <sup>1</sup>	57) 496	.666	7
 ? /	₹A	Lii Code					-				, none no		Form 99		
,,	w 7													• •	/

2009	FEDERAL STATEMENTS	PAGE 1
CLIENT BIRNBAUM	RICHARD & SHELLEY BIRNBAUM FAMILY FOUNDATION	54-6480217
8/11/10		02:57PM
STATEMENT 1 FORM 990-PF, PART I, LINE 16I ACCOUNTING FEES	3	
TAX PREPARATION	(A) (B) NET (C) EXPENSES INVESTMENT ADJUSTE PER BOOKS INCOME NET INCO  \$ 1,545. \$ 1,545. \$ TOTAL \$ 1,545. \$ 1,545. \$	
STATEMENT 2 FORM 990-PF, PART I, LINE 18 TAXES		
2008 TAX PAYMENT 2009 ESTIMATED TAX PAYMEN	(A) (B) NET (C)  EXPENSES INVESTMENT ADJUSTE  PER BOOKS INCOME NET INCO  \$ 44.  920.  TOTAL \$ 964. \$ 0. \$	
STATEMENT 3 FORM 990-PF, PART III, LINE 3 OTHER INCREASES	· · ·	
UNREALIZED GAIN ON DONATE	D STOCK TOTA	\$ 658. \$ 658.
STATEMENT 4 FORM 990-PF, PART XV, LINE 1 FOUNDATION MANAGERS - 2% RICHARD S. BIRNBAUM SHELLEY G. BIRNBAUM		
STATEMENT 5 FORM 990-PF, PART XV, LINE 3 RECIPIENT PAID DURING THE	YEAR	
NAME AND ADDRESS	FOUND- DONEE ATION PURPOSE OF RELATIONSHIP STATUS GRANT	F AMOUNT

CHARITABLE PURPOSES \$

3,700.

TEMPLE BETH AHABAH 111 W. FRANKLIN STREET RICHMOND, VA 23226

N/A

2009

## FEDERAL STATEMENTS

RICHARD & SHELLEY BIRNBAUM FAMILY FOUNDATION

54-6480217

PAGE 2

8/11/10

**CLIENT BIRNBAUM** 

02.57PM

#### STATEMENT 5 (CONTINUED) FORM 990-PF, PART XV, LINE 3A RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT		AMOUNT
AMERICAN UNIVERSITY 4400 MASSACHUSETTS AVENUE WASHINGTON, DC 20016	N/A		EDUCATION PURPOSES	\$	520.
JEWISH FAMILY SERVICES 6718 PATTERSON AVENUE RICHMOND, VA 23226	N/A		CHARITABLE PURPOSES		200.
MASSEY CANCER CENTER 401 COLLEGE STREET RICHMOND, VA 23298	N/A		CHARITABLE PURPOSES		1,000.
HOSPITAL HOSPITALITY HOUSE 612 EAST MARSHALL STREET RICHMOND, VA 23219	N/A		CHARITABLE PURPOSES		1,000.
RICHMOND SYMPHONY RICHMOND, VA			FOR CHARITABLE PURPOSES		500.
ITHACA COLLEGE ITHACA, NY			CHARITABLE PURPOSES		1,000.
BETH SHALOM HOME RICHMOND, VA			CHARITABLE PURPOSES		1,000.
JEWISH FAMILY SERVICES 6718 PATTERSON AVENUE RICHMOND, VA 23226	N/A		CHARITABLE PURPOSES		13,580.
JEWISH FAMILY SERVICES 6718 PATTERSON AVENUE RICHMOND, VA 23226	N/A		CHARITABLE PURPOSES		11,408.
CENTER STAGE FOUNDATION RICHMOND, VA	N/A		FOR CHARITABLE PURPOSES		1,500.
AMERICAN UNIVERSITY 4400 MASSACHUSETTS AVENUE WASHINGTON, DC 20016	N/A		FOR CHARITABLE PURPOSES		24,500.
			TO:	ΓAL \$	59,908.

### Form **8868** (Rev April 2009)

# Application for Extension of Time To File an Exempt Organization Return

OMB No 1545 1709

Department of the Treasury Internal Revenue Service

File a separate application for each return.

` If you are	filing for an Automatic 3-Month Extension, complete only Part I and check this box	<b>&gt;</b>	X	
•	filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this		لتنا	
•	lete Part II unless you have already been granted an automatic 3-month extension on a previously fil			
	Automatic 3-Month Extension of Time. Only submit original (no copies needed)			
	tatematics mental extension of times only easily conginer (no explicit heades)	7.		
A corporation	required to file Form 990-T and requesting an automatic 6-month extension — check this box and $\alpha$	complete Part I only		
All other corp income tax re	orations (including 1120-C filers), partnerships, REMICS, and trusts must use Form 7004 to request furns	an extension of time to file		
returns noted he additional Form 990-T	ing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a substant submit the fully completed and signed page 2 (Part II) of Form 8868. For more determined the file of the form of the file for Charities. Such profits	Belectronically if (1) you wan composite or consolidated		
	Name of Exempt Organization	Employer identification number		
Type or orint	RICHARD & SHELLEY BIRNBAUM FAMILY FOUNDATION	54-6480217		
ile by the	Number street, and room or suite number If a P O box, see instructions	134 0400217	—	
due date for iling your	9020 STONY POINT PKWY #185			
eturn See nstructions	City, town or post office, state, and ZIP code. For a foreign address, see instructions	****		
	RICHMOND, VA 23235			
Check type o	f return to be filed (file a separate application for each return)			
Form 990		720		
Form 990	├- ` ` ' <i>'</i>			
Form 990				
X Form 990				
Telephone If the orga If this is for check this	s are in the care of ► RICHARD S. BIRNBAUM  No ► 804 272 7899 FAX No ►  anization does not have an office or place of business in the United States, check this box or a Group Return, enter the organization's four digit Group Exemption Number (GEN)  box ► ☐ If it is for part of the group, check this box ► ☐ and attach a list with the names a sion will cover			
1 I reques	it an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time			
_	$8/15$ , 20 $10$ _, to file the exempt organization return for the organization named above ension is for the organization's return for			
► X	calendar year 20 <u>09</u> or			
► □	calendar year 20 <u>09</u> or tax year beginning, 20, and ending, 20,			
2 If this ta	x year is for less than 12 months, check reason.  Initial return Final return	Change in accounting period		
3a If this ap nonrefu	oplication is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any indable credits. See instructions	3a \$ 92	20.	
	oplication is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments include any prior year overpayment allowed as a credit	зь \$ 92	20.	
deposit	Due. Subtract line 3b from line 3a Include your payment with this form, or, if required, with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System).	3c \$	0.	
Caution. If yo	u are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form uctions.		- <del>-</del>	
	racy Act and Paperwork Reduction Act Notice, see instructions.	Form 8868 (Rev 4-20	009)	