Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2009

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

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

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

Name of foundation: OAKLAND FOUNDATION, INC.

Number and street (or P O box number if mail is not delivered to street address): P.O. BOX 491 — Room/suite:

City or town, state and ZIP code: STOWE VT 05672

A Employer identification number: 55-0754353

B Telephone number (see page 10 of the instructions): 802-253-8492

C If exemption application is pending check here ▶ [ ]

D 1 Foreign organizations check here ▶ [ ]

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ [ ]

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ [ ]

F If the foundation is in a 60-month termination under section 507(b)(1)(B) check here ▶ [ ]

H Check type of organization: [ ] Section 501(c)(3) exempt private foundation [ ] Section 4947(a)(1) nonexempt charitable trust [X] Other taxable private foundation

I Fair market value of all assets at end of year (from Part II col (c), line 16) ▶ $ 3,543,750

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

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

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)				
	2	Check ▶ [X] if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	2,899	2,899	2,899	
	4	Dividends and interest from securities	134,631	131,343	134,631	
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	-24,383			
	b	Gross sales price for all assets on line 6a 1,227,243				
	7	Capital gain net income (from Part IV, line 2)				
	8	Net short-term capital gain			6,423	
	9	Income modifications				
	10a	Gross sales less returns & allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	113,147	134,242	143,953	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees etc	28,000			28,000
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule) STMT 1	1,490			1,490
	c	Other professional fees (attach schedule) STMT 2	26,338	26,338		
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions) STMT 3	2,142			2,142
	19	Depreciation (attach schedule) and depletion STMT 4	753			
	20	Occupancy				
	21	Travel conferences and meetings	1,169			1,169
	22	Printing and publications				
	23	Other expenses (att sch) STMT 5	3,616			3,616
	24	**Total operating and administrative expenses.** Add lines 13 through 23	63,508	26,338		36,417
	25	Contributions, gifts grants paid	110,288			110,288
	26	**Total expenses and disbursements.** Add lines 24 and 25	173,796	26,338	0	146,705
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-60,649			
	b	**Net investment income** (if negative, enter -0-)		107,904		
	c	**Adjusted net income** (if negative, enter -0-)			143,953	

RECEIVED
833 MAY 17 2010 IRS-OSC
OGDEN, UT

SCANNED MAY 19 2010

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the Instructions.

Form **990-PF** (2009)

DAA

Part II Balance Sheets

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

			Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	13,728	10,117	10,117
	2	Savings and temporary cash investments	583,095	404,240	404,240
	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 (att schedule) ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule) STMT 6	768,971	239,629	237,338
	b	Investments—corporate stock (attach schedule) SEE STMT 7	795,419	1,591,406	2,310,165
	c	Investments—corporate bonds (attach schedule) SEE STMT 8	717,026	572,951	580,762
	11	Investments—land buildings and equipment basis ▶			
		Less accumulated depreciation (attach sch) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land buildings, and equipment basis ▶ 16,428			
		Less accumulated depreciation (attach sch) ▶ STMT 9 15,300	1,881	1,128	1,128
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1 item I)	2,880,120	2,819,471	3,543,750
Liabilities	17	Accounts payable and accrued expenses	1,071	1,071	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers directors trustees and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	1,071	1,071	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	3,091,339	3,091,339	
	28	Paid-in or capital surplus, or land bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment or other funds	-212,290	-272,939	
	30	**Total net assets or fund balances** (see page 17 of the instructions)	2,879,049	2,818,400	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	2,880,120	2,819,471	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II column (a) line 30 (must agree with end-of-year figure reported on prior year's return)	1	2,879,049
2	Enter amount from Part I, line 27a	2	-60,649
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	2,818,400
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b) line 30	6	2,818,400

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo day, yr)	(d) Date sold (mo day yr)
1a SEE WORKSHEET			
b			
c			
d			
e			

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

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

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

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I line 7 / If (loss) enter -0- in Part I line 7 }	2	-24,383
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I line 8, column (c) (see pages 13 and 17 of the instructions) If (loss) enter -0- in Part I, line 8	3	6,423

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes " the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	173,535	3,697,684	0.046931
2007	188,523	4,036,820	0.046701
2006	171,867	3,854,722	0.044586
2005	193,270	3,756,162	0.051454
2004	196,816	3,717,550	0.052942

2 **Total** of line 1, column (d)	2	0.242614
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	0.048523
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	3,296,119
5 Multiply line 4 by line 3	5	159,938
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,079
7 Add lines 5 and 6	7	161,017
8 Enter qualifying distributions from Part XII, line 4	8	146,705

If line 8 is equal to or greater than line 7, check the box in Part VI line 1b and complete that part using a 1% tax rate See the Part VI instructions on page 18

DAA

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b		1	2,158
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I line 12 col (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3	Add lines 1 and 2		3	2,158
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-		5	2,158
6	Credits/Payments			
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a 2,551		
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments Add lines 6a through 6d		7	2,551
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶		9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶		10	393
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ 393 **Refunded** ▶		11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national state or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ $ ______ (2) On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes " attach a detailed description of the activities	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument articles of incorporation, or bylaws, or other similar instruments? If "Yes " attach a conformed copy of the changes	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes " has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? If "Yes " complete Part II, col (c), and Part XV	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ WV, VT			
b	If the answer is "Yes" to line 7 has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No " attach explanation	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes " complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes " attach a schedule listing their names and addresses	10		X

DAA

Part VII-A Statements Regarding Activities (continued)

				Yes	No
11	At any time during the year, did the foundation, directly or indirectly own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)		11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17 2008?		12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?		13	X	
	Website address ▶ N/A				
14	The books are in care of ▶ MRS. KATHERINE COPPOCK 808 BARROWS ROAD	Telephone no ▶ 802-253-4550			
	Located at ▶ STOWE, VT	ZIP+4 ▶ 05672			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year	▶ 15			

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

				Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.				
1a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to or pay or reimburse the expenses of a disqualified person?	☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? **(Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	☐ Yes ☒ No			
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		X
	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?	N/A	1c		
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))				
a	At the end of tax year 2009 did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	☐ Yes ☒ No			
	If "Yes " list the years ▶ 20 , 20 20 , 20				
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed answer "No" and attach statement—see page 20 of the instructions)	N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a list the years here ▶ 20 20 , 20 20				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes " did it have excess business holdings in 2009 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26 1969 **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15- or 20-year first phase holding period? (Use Schedule C Form 4720 to determine if the foundation had excess business holdings in 2009)	N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b		X

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

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

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address		(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account other allowances
KATHERINE L. COPPOCK 808 BARROWS RD	STOWE VT 05672	PRESIDENT 16.00	14,000	0	0
JOHN S LUTZ 1109 7TH STREET	PARKERSBURG WV 26101	VICE-PRES 6 00	7,000	0	0
ELIZABETH S. LUTZ 1131 7TH STREET	PARKERSBURG WV 26101	SECRETARY 6.00	7,000	0	0

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

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

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

DAA

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

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

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

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served conferences convened research papers produced etc	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See page 24 of the instructions 3	
Total. Add lines 1 through 3 ▶	

DAA

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable etc , purposes		
a	Average monthly fair market value of securities	1a	2,510,108
b	Average of monthly cash balances	1b	836,206
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	**Total** (add lines 1a b, and c)	1d	3,346,314
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	3,346,314
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount see page 25 of the instructions)	4	50,195
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V line 4	5	3,296,119
6	**Minimum investment return.** Enter 5% of line 5	6	164,806

Part XI Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part)

1	Minimum investment return from Part X line 6	1	164,806
2a	Tax on investment income for 2009 from Part VI line 5 — 2a: 2,158		
b	Income tax for 2009 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	2,158
3	Distributable amount before adjustments Subtract line 2c from line 1	3	162,648
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	162,648
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	162,648

Part XII Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions gifts, etc —total from Part I column (d), line 26	1a	146,705
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII line 4	4	146,705
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I line 27b (see page 26 of the instructions)	5	0
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	146,705

Note. The amount on line 6 will be used in Part V column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

DAA

Part XIII Undistributed Income (see page 26 of the instructions)

		(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI line 7					162,648
2 Undistributed income, if any, as of the end of 2009					
a Enter amount for 2008 only					
b Total for prior years 20____ 20____ , 20____					
3 Excess distributions carryover if any to 2009					
a From 2004	6,664				
b From 2005	7,859				
c From 2006	3,843				
d From 2007	12,084				
e From 2008					
f **Total** of lines 3a through e		30,450			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ $ 146,705					
a Applied to 2008, but not more than line 2a					
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)					
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)					
d Applied to 2009 distributable amount					146,705
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))		15,943			15,943
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f 4c, and 4e Subtract line 5		14,507			
b Prior years' undistributed income Subtract line 4b from line 2b					
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed					
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions					
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions					
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010					0
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		14,507			
10 Analysis of line 9					
a Excess from 2005					
b Excess from 2006	2,423				
c Excess from 2007	12,084				
d Excess from 2008					
e Excess from 2009					

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

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

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

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

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

1 Information Regarding Foundation Managers:

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

N/A

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

N/A

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

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

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

KATHERINE COPPOCK 802-253-4550
808 BARROWS RD STOWE VT 05672

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

SEE ATTACHED GUIDELINES

c Any submission deadlines

NONE

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

NONE

DAA

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE STATEMENT 10				110,288
Total			▶ 3a	110,288
b Approved for future payment N/A				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512 513 or 514 (c) Exclusion code	Excluded by section 512 513 or 514 (d) Amount	(e) Related or exempt function income (See page 28 of the instructions)
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	2,899	
4 Dividends and interest from securities			14	134,631	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	-24,383	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b) (d) and (e)		0		113,147	0

13 **Total.** Add line 12 columns (b), (d), and (e) 13 113,147

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 29 of the instructions)
N/A	

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527 relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions.			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities equipment or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities equipment, mailing lists other assets or paid employees	1c		X

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

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers transactions and sharing arrangements
N/A			

2a Is the foundation directly or indirectly affiliated with or related to one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes" complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

Under penalties of perjury I declare that I have examined this return, including accompanying schedules and statements and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

Signature of officer or trustee | Date: 5/10/2010 | Title: VICE PRESIDENT

Paid Preparer's Use Only

Preparer's signature | Date: 05/05/10 | Check if self-employed ☐ | Preparer's identifying number (see Signature on page 30 of the instructions): P00575378

Firm's name (or yours if self-employed), address, and ZIP code: TENNEY & ASSOCIATES, LLC CPA'S, 418 GRAND PARK DR STE 320, VIENNA, WV 26105 | EIN ▶ 31-1624928 | Phone no 304-428-9711

DAA

Form **990-PF**

Capital Gains and Losses for Tax on Investment Income

2009

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

Name: OAKLAND FOUNDATION, INC.

Employer Identification Number: 55-0754353

	(a) List and describe the kind(s) of property sold e g , real estate 2-story brick warehouse or common stock, 200 shs MLC Co	(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo day yr)	(d) Date sold (mo day yr)
(1)	SEE UNITED BANK DETAIL SCHEDULE	P	VARIOUS	VARIOUS
(2)	SEE UNITED BANK DETAIL SCHEDULE	P	VARIOUS	VARIOUS
(3)	10,482.18 SH FIDELITY ADV HI INC	P	VARIOUS	05/27/09
(4)	STCG DISTRIBUTIONS - SEE UB BANK DET	P	VARIOUS	VARIOUS
(5)	LTCG DISTRIBUTIONS -UB DETAIL			
(6)	LTCG FROM PARTNERSHIP			
(7)				
(8)				
(9)				
(10)				
(11)				
(12)				
(13)				
(14)				
(15)				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
(1)	354,317		349,782	4,535
(2)	796,931		801,844	-4,913
(3)	73,787		100,000	-26,213
(4)	1,888			1,888
(5)	277			277
(6)	43			43
(7)				
(8)				
(9)				
(10)				
(11)				
(12)				
(13)				
(14)				
(15)				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k) but not less than -0-) **or** Losses (from col (h))
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
(1)				4,535
(2)				-4,913
(3)				-26,213
(4)				1,888
(5)				277
(6)				43
(7)				
(8)				
(9)				
(10)				
(11)				
(12)				
(13)				
(14)				
(15)				

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
TAX SERVICES	$ 1,490	$	$	$ 1,490
TOTAL	$ 1,490	$ 0	$ 0	$ 1,490

Statement 2 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
TRUSTEE FEES-UNITED BANK	$ 13,338	$ 13,338	$	$
CONSULTING FEES	13,000	13,000		
TOTAL	$ 26,338	$ 26,338	$ 0	$ 0

Statement 3 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EMPLOYER PORTION OF FICA & MEDIC	$ 2,142	$	$	$ 2,142
TOTAL	$ 2,142	$ 0	$ 0	$ 2,142

Statement 4 - Form 990-PF, Part I, Line 19 - Depreciation

Description							
Date Acquired	Cost Basis	Prior Year Depreciation	Method	Life	Current Year Depreciation	Net Investment Income	Adjusted Net Income
CHAIR							
12/18/97	$ 543	$ 543	200DB	7	$	$	$
BOOKCASE							
1/12/97	76	76	200DB	7			
DELL COMPUTER							
1/02/02	2,382	2,382	200DB	5			
STAPLES PRINTER							
11/09/02	230	230	200DB	5			
COMPUTER EQUIPMENT							
12/31/97	8,645	8,645	200DB	5			

Federal Statements

Statement 4 - Form 990-PF, Part I, Line 19 - Depreciation (continued)

Description							
Date Acquired	Cost Basis	Prior Year Depreciation	Method	Life	Current Year Depreciation	Net Investment Income	Adjusted Net Income
LAPTOP							
2/03/06	$ 2,530	$ 1,801	200DB	5	$ 292	$	$
DELL COMPUTER							
12/28/07	2,022	870	200DB	5	461		
TOTAL	$ 16,428	$ 14,547			$ 753	$ 0	$ 0

Statement 5 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
	$	$	$	$
EXPENSES				
INTERNET	1,166			1,166
POST OFFICE BOX RENT	114			114
POSTAGE	121			121
OFFICE SUPPLIES	452			452
TELEPHONE	743			743
LICENSE	25			25
DUES	995			995
TOTAL	$ 3,616	$ 0	$ 0	$ 3,616

Statement 6 - Form 990-PF, Part II, Line 10a - US and State Government Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
FFCB AGENCY 4.17% 6/17/13	$ 47,654	$	COST	$
FFCB SOV CLL 3/24/09 2.625% 3/24/10	125,006		COST	
FFCB SOV CLL 6/27/08 3.15% 9/27/10	175,006		COST	
FHLB AGENCY 5.52% 7/27/11	50,001		COST	
FHLB CALLABLE 1/29/10 4% 1/29/13	100,002	100,002	COST	100,250
FHLB BONDS 4.25% 2/12/13	100,001		COST	
FHLB AGENCY 5% 7/29/13	75,002	75,002	COST	75,258
FHLMC SERIES 3137 5.125% 12/15/13	46,298	14,624	COST	14,720
WV ECON DEV AUTH 6.2% 11/1/24-14	50,001	50,001	COST	47,110
TOTAL	$ 768,971	$ 239,629		$ 237,338

Statement 7 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
1,000 AT&T	$	$ 24,683	COST	$ 28,030
399 ABBOTT LABORATORIES		20,017	COST	21,542
1,563 ACADIAN EMERGING MARKETS		25,003	COST	25,985
1,470 ALTRIA GROUP		25,007	COST	28,856
821 ARTIO INTERN'L EQUITY FUND		25,004	COST	23,186
2,000 IPATH DOW JONES PREFERRED		50,000	COST	47,660
788 BANK OF AMERICA	27,999		COST	
13,021 CALAMOS CONVERTIBLE FUND		200,007	COST	230,599
4,928 CHEVRON	10,237		COST	
4,858 CHEVRON		10,092	COST	374,017
1,000 CITIGROUP	25,654		COST	
500 COCA COLA		24,493	COST	28,500
465 DEERE & CO		20,030	COST	25,152

Statement 7 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments (continued)

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
2,000 DB CONT CAP TRUST III	$ 50,001	$ 50,001	COST	$ 47,460
1,000 DOW CHEMICAL COMPANY	30,034		COST	
330 ENTERGY		25,132	COST	27,007
4,800 EXXON MOBIL CORP	1,160	1,160	COST	327,312
9,183 FEDERATED TOTAL RETURN #328		100,000	COST	99,816
735 GENERAL ELECTRIC COMPANY	25,020	25,020	COST	11,121
675 HJ HEINZ CO		25,021	COST	28,863
467 HOME PPTYS INC		20,009	COST	22,281
1,325 ISHARES DJ SELECT DIVIDEND	77,664	77,664	COST	58,181
525 ISHARES DJ TECHNOLOGY SEC	25,289		COST	
750 JP MORGAN CHASE	27,449		COST	
600 JOHNSON & JOHNSON	23,889	23,889	COST	38,646
361 KINDER MORGAN ENERGY		20,032	COST	22,014
420 MCDONALDS		24,963	COST	26,225
500 S&P MIDCAP 400 INDEX DEP RECPTS	46,193		COST	
2,250 MYLAN LABS INC	20,578		COST	
3,314 NJF CLOSED END FUND	79,171	79,171	COST	48,881
835 ONEOK INC		24,945	COST	37,216
9,149 PIMCO TOTAL RETURN FUND		100,007	COST	98,811
335 PPG INDUSTRIES		20,003	COST	19,611
1,128 PFIZER INC	25,038	25,038	COST	20,518
9,794 PIMCO FOREIGN BOND		100,007	COST	98,041
2,000 BARCLAYS PREFERRED STOCK	50,000		COST	
10,482.18 FIDELITY ADVISOR HIGH INC	100,000		COST	
14,514.33 T ROWE PRICE HIGH YLD FD	100,041	100,041	COST	93,182
23,981 RIDGEWORTH SEIX HIGH YIELD		200,007	COST	222,542
4,726 ROYCE TOTAL RETURN		50,007	COST	51,087

Statement 7 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments (continued)

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
1,045 SENSIENT TECHNCLOGY CORP	$	$ 24,951	COST	$ 27,483
2,000 WELLS FARGO CAP TR IV 7` PREF	50,002	50,002	COST	50,340
TOTAL	$ 795,419	$ 1,591,406		$ 2,310,165

Statement 8 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
AT&T MOBILITY CORP 6.5: 12/15/11	$	$ 49,817	COST	$ 54,366
BELLSCUTH CORP 4.2 9/15/09	49,819		COST	
CIT GROUP INC 5.6 4/27/11	46,908		COST	
JP MORGAN CHASE 6 2/15/09	197,261		COST	
CINGULAR AT&T MOBILITY 6.5, 12/15/11	49,819		COST	
GENERAL ELECTRIC 4 2/15/12	75,001	75,001	COST	76,918
GENWORTH GLOBAL FD 5.25 5/12/12	75,320	75,235	COST	75,718
PITNEY BOWES INC 4.75 1/15/16	48,392	48,392	COST	52,000
PRUDENTIAL FIN 5.5 3/15/16	99,503	99,503	COST	100,135
WACHOVIA BANK 7.6 5/14/22	75,003	75,003	COST	71,625
UNITED BANK CD 6/22/10		150,000	COST	150,000
TOTAL	$ 717,026	$ 572,951		$ 580,762

Federal Statements

Statement 9 - Form 990-PF, Part II, Line 14 - Land, Building, and Equipment

Description	Beginning Net Book	End Cost / Basis	End Accumulated Depreciation	Net FMV
	$ 1,881	$ 16,428	$ 15,300	$ 1,128
TOTAL	$ 1,881	$ 16,428	$ 15,300	$ 1,128

Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description
SEE ATTACHED GUIDELINES

Form 990-PF, Part XV, Line 2c - Submission Deadlines

Description
NONE

Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description
NONE

Statement 10 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Name / Address	Address / Relationship	Status	Purpose	Amount
HUMANE SOCIETY OF PARKERS PARKERSBURG WV 26101	29TH & POPLAR STREETS		GENERAL SUPPORT	3,000
NORTH COUNTRY ANIMAL LEAG MORRISVILLE VT 05661	3524 LAPORTE ROAD		SUPPORT MATCHING GRANT	1,000
ARTSBRIDGE PARKERSBURG WV 26101	935 MARKET STREET		"PINO AND BONZER" CHILDREN'S PROGRAM	600
CHILDREN'S LITERACY FOUND WATERBURY CENTER VT 05677	1536 LOOMIS HILL RD		CHILDREN'S BOOKS FOR LOW INCOME	2,500
FLYNN CENTER FOR THE PERF BURLINGTON VT 05401	153 MAIN STREET		LOW COST TICKETS FOR SOC SVC CLIENTS	1,000
GREEN MOUNTAIN LIBRARY MIDDLEBURY VT 05753	P.O. BOX 264		PURCHASE DOWNLOADABLE LIBRARY BOOKS	2,000
ISLAND POND LIBRARY ISLAND POND VT 05846	49 MILL STREET EXT.		PURCHASE PROJECTOR AND SCREEN	940
JEUDEVINE MEMORIAL LIBRAR HARDWICK VT 05843	93 NORTH MAIN STREET		PURCHASE MULTIMEDIA PROJECTOR	1,379
LANPHER MEMORIAL LIBRARY HYDE PARK VT 05655	141 MAIN STREET		DVD'S AND DVD BINDERS	506
MID-OHIO VALLEY MULTI-CUL PARKERSBURG WV 26101			"HISTORY HITTING THE ROAD" PROGRAM	2,800
PARKERSBURG ART CENTER PARKERSBURG WV 26101	725 MARKET STREET		IMROVEMENTS TO ART FACTORY & CARPET	4,893
RIVER CITIES SYMPHONY PARKERSBURG WV 26102	P.O. BOX 477		FALL AND EDUCATIONAL CONCERTS	2,500
THEATRE DE JEUNESSE CRESTON WV 26141	1011 CREST VIEW DRIVE		PURCHASE ORCHESTRA MUSIC SYSTEM	1,600
FRIENDS OF BLACKWATER CRK CHARLESTON WV 24311	501 ELIZABETH STREET		HIKING TRAIL & STREAM MONITORING	4,981
GREEN MOUNTAIN CLUB WATERBURY CENTER VT 05677	4711 WATERBURY-STOWE RD		A/V SYSTEM FOR VISITOR EDUCATION CTR	1,500
NATURE CONSERVANCY - VERM MONTPELIER VT 05602	27 STATE STREET SUITE 4		SUPPORT "WAR ON WEEDS" PROGRAM	1,000
TRUST FOR PUBLIC LAND MONTPELIER VT 05602	3 SHIPMAN PLACE		CAMPAIGN FOR NORTHERN GREEN MOUNTAIN	1,000
WV DIVISION OF FORESTRY CHARLESTON WV 25305	1900 KANAWHA BLVD. EAST		TREE PLANTING MATCHING GRANT AND POS	1,500
WINOOSKI NATURAL RESOURCE BERLIN VT 05602	617 COMSTOCK ROAD SUITE 1		SUPPORT LOCAL GROWERS GUIDE	1,000

Statement 10 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name / Address	Address / Relationship	Status	Purpose	Amount
TUCKER COUNTY HIGH SCHOOL HAMBLETON WV 26269	RT. 1, BOX 153		2009 COLLEGE SCHOLARSHIP	1,500
WVU-PARKERSBURG PARKERSBURG WV 26104	300 CAMPUS DRIVE		MARTIN LUTHER KING DAY SPEAKER	1,000
GOOD SAMARITAN CLINIC PARKERSBURG WV 26104	911 EMERSON AVENUE		COMPUTERS & SOFTWARE FOR EXAM ROOMS	2,000
LEUKEMIA AND LYMPHOMA SOC ALBANY NY 12205	5 COMPUTER DR W STE 100		SUPPORT BURLINGTON VT "LIGHT THE NIG	500
MONONGALIA GENERAL HOSPIT MORGANTOWN WV 26605	1200 J D ANDERSON DRIVE		BACKBOARDS & SPINE IMMOBILIZERS	2,270
PORTER MEDICAL CENTER MIDDLEBURY VT 05753	115 PORTER DRIVE		ESTABLISH PALLIATIVE CARE PROGRAM	2,000
VISITING NURSES ASSOCIATI COLCHESTER VT 05446	1110 PRIM ROAD		PURCHASE MEDICAL LIFTS	1,000
VIRGIN ISLANDS SEARCH AND ROAD TOWN TORTOLA VI NA	PO BOX 3042		SAFETY EQUIPMENT	1,000
SHELBURNE FARMS SHELBURNE VT 05482			SUPPORT BREEDING BARN RENOVATION	3,000
SHELBOURNE MUSEUM SHELBOURNE VT 05482	PO BOX 10		NEW ROOF FOR OWL COTTAGE	5,000
WOOD CTY HIST LANDMARK PARKERSBURG WV 26101	1 COURT STREET		FENCE FOR BELLEVILLE CEMETARY	3,000
WOOD COUNTY HISTORICAL SO PARKERSBURG WV 26102	PO BOX 565		PILLARS & ARCH FOR DILS CEMETARY	2,500
ST.FRANCIS XAVIER CHURCH PARKERSBURG WV 26101	532 MARKET STREET		CAPITAL FUND	1,500
ST. FRANCIS XAVIER CHURCH PARKERSBURG WV 26101	532 MARKET STREET		GENERAL SUPPORT	5,000
BOYS & GIRLS CLUB BURLING BURLINGTON VT 05401	62 OAK STREET		DIGITAL CAMERA & ADOBE PHOTOSHOP	2,897
CENTRAL VT ADULT BASIC ED BARRE VT 05641	45 WASHINGTON ST STE 100		SUPPORT OFFICE WORKERS TRAINING	2,000
HEINEBERG SENIOR CENTER BURLINGTON VT 05408	14 HEINEBERG ROAD		KITCHEN AND BATHROOM RENOVATIONS	500
HOWARD CENTER BURLINGTON VT 05401	208 FLYNN AVE SUITE 3J		REPRINT &DISTRIBUTE YOUTH YELLOW PGS	4,900
JOHN GRAHAM CENTER VERGENNES VT 05491	69 MAIN STREET		PROVIDE WEEKEND MEALS & COUNSELING	500

Statement 10 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name / Address	Address / Relationship	Status	Purpose	Amount
LAMOILLE COMM FOODSHARE MORRISVILLE VT 05661	197 HARREL STREET		SUPPORT FRESH FRUIT PURCHASES	2,000
ORANGE CTY PARENT CHILD C CHELSEA VT 05038	RR 110		HELP REPLACE CHIMNEY	1,752
PARKERSBURG DAY NURSERY PARKERSBURG WV 26101	1021 MARKET STREET		GENERAL SUPPORT	4,000
PARKERSBURG DAY NURSERY PARKERSBURG WV 26101	1021 MARKET STREET		UPGRADE CLASSROOMS FOR 2-3 YEAR OLDS	2,000
VT HORSE ASSISTED THERAPY MIDDLESEX VT 05602			SCHOLARSHIPS FOR AUTISTIC CHILDREN	500
VERMONT CAMPAIGN TO END C BURLINGTON VT 05401	180 FLYNN AVENUE		SUPPORT OUTREACH & TECHNICAL ASSISTA	500
VERMONT REFUGEE ASSISTANC BURLINGTON VT 05401	241 N WINOOSKI AVE		ASSIST TO REFUGEE TORTURE SURVIVORS	1,000
VT YOUTH CONSERVATION COR RICHMOND VT 05477	1949 EAST MAIN STREET		SUPPORT "VERMONT FUTURES" SCHOOL PRO	1,000
VOLUNTEER ACTION CENTER PARKERSBURG WV 26101	521 MARKET ST SUITE 6		PURCHASE OFFICE EQUIPMENT	1,900
YMCA OF PARKERSBURG PARKERSBURG WV 26104	1800 30TH STREET		SEND TEENS TO YMCA LEADERSHIP TRAINI	1,500
YWCA OF VERMONT BURLINGTON VT 05401	278 MAIN STREET		PURCH MATERIALS FOR CAMP ART & DRAMA	1,000
CATAMOUNT TRAIL ASSOCIATI BURLINGTON VT 05401	1 MILL STREET SUITE 350		PURCHASE NEW TRAIL SIGNS	500
CITY OF PARKERSBURG PARKERSBURG WV 26101	ONE GOVERNMENT SQUARE		SUPPORT SKATE PARK CONSTRUCTION	5,000
MT. MANSFIELD SKI EDUCATI STOWE VT 05672	403 SPRUCE PEAK		SUPPORT CONSTRUCTION OF CLUBHOUSE AD	5,000
N CAROLINA BEACH BUGGY AS MANTEO NC 27954	PO BOX 940		SUPPORT BEACH ACCESS	1,000
TIMBERLINE RACE TEAM CROSS LANES WV 25313			GENERAL SUPPORT	1,500
TIMBERLINE RACE TEAM CROSS LANES WV 25313			SUPPORT CLUBHOUSE	500
VAN DEVENDER M S CHEERLEA PARKERSBURG WV 26104	918 31ST STREET		PURCHASE UNIFORMS & WARMUPS	1,870

Federal Statements

Statement 10 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name / Address	Address / Relationship	Status	Purpose	Amount
TOTAL				110,288

Form **4562**

Department of the Treasury
Internal Revenue Service (99)

Depreciation and Amortization
(Including Information on Listed Property)

▶ See separate instructions. ▶ Attach to your tax return.

OMB No 1545-0172

2009

Attachment Sequence No 67

Name(s) shown on return: OAKLAND FOUNDATION, INC.

Identifying number: 55-0754353

Business or activity to which this form relates: INDIRECT DEPRECIATION

Part I Election To Expense Certain Property Under Section 179

Note: If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount See the instructions for a higher limit for certain businesses	1	250,000
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation (see instructions)	3	800,000
4	Reduction in limitation Subtract line 3 from line 2 If zero or less enter -0-	4	
5	Dollar limitation for tax year Subtract line 4 from line 1 If zero or less, enter -0- If married filing separately, see instructions	5	

6 (a) Description of property	(b) Cost (business use only)	(c) Elected cost

7	Listed property Enter the amount from line 29	7	
8	Total elected cost of section 179 property Add amounts in column (c) lines 6 and 7	8	
9	Tentative deduction Enter the **smaller** of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2008 Form 4562	10	
11	Business income limitation Enter the smaller of business income (not less than zero) or line 5 (see instructions)	11	
12	Section 179 expense deduction Add lines 9 and 10 but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2010 Add lines 9 and 10 less line 12 ▶	13	

Note: Do not use Part II or Part III below for listed property Instead, use Part V

Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.) (See instr.)

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions)	14	
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Do not include listed property.) (See instructions.)

Section A

17	MACRS deductions for assets placed in service in tax years beginning before 2009	17	753
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here ▶ ☐		

Section B—Assets Placed in Service During 2009 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only—see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs		S/L	
h Residential rental property			27 5 yrs	MM	S/L	
			27 5 yrs	MM	S/L	
i Nonresidential real property			39 yrs	MM	S/L	
				MM	S/L	

Section C—Assets Placed in Service During 2009 Tax Year Using the Alternative Depreciation System

(a) Classification of property	(b)	(c)	(d)	(e)	(f)	(g)
20a Class life					S/L	
b 12-year			12 yrs		S/L	
c 40-year			40 yrs	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property Enter amount from line 28	21	
22	**Total.** Add amounts from line 12, lines 14 through 17 lines 19 and 20 in column (g) and line 21 Enter here and on the appropriate lines of your return Partnerships and S corporations—see instructions	22	753
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

THERE ARE NO AMOUNTS FOR PAGE 2

ACCOUNT # 1090000340
TAX ID 55-0754353
FROM 01/01/2009
TO 12/31/2009
FISCAL YEAR: 12/31

UNITED BANK
Gain and Loss Report
OAKLAND FOUNDATION, INC.

PAGE 1
AS OF 02/10/2010
RUN FEB 10 2010

GAIN AND LOSS DETAIL

CUSIP #/ PROPERTY DESCRIPTION	DATE SOLD/ ACQUIRED	PROCEEDS OF SALE	COST	GAIN OR LOSS	REG
SHORT TERM CAPITAL GAIN (LOSS)					
31331YZL7					
175000 UNITS OF	01/14/2009	175,000.00	175,005.16	(5.16)	40
FFCB SOVEREIGN AGENCY CALLABLE	03/19/2008				
06/27/2008 @ 100.00 3.15%					
09/27/2010					
079860AF9					
50000 UNITS OF	09/15/2009	50,000.00	49,818.75	181.25	40
BELLSOUTH CORP BOND 4.2%	12/03/2008				
09/15/2009					
87234N880					
9910.803 SHARES OF	12/09/2009	101,285.37	100,007.00	1,278.37	65
TCW SELECT EQUITIES CL I TOTAL	10/09/2009				
RETURN BOND					
81725T100					
1045 SHARES OF	12/29/2009	28,031.21	24,950.97	3,080.24	40
SENSIENT TECHNOLOGY	06/03/2009				
TOTAL SHORT TERM CAPITAL GAIN (LOSS)		354,316.58	349,781.88	4,534.70	

ACCOUNT # 1090000340
TAX ID 55-0754353
FROM 01/01/2009
TO 12/31/2009
FISCAL YEAR: 12/31

UNITED BANK
Gain and Loss Report
OAKLAND FOUNDATION, INC.

PAGE 2
AS OF 02/10/2010
RUN FEB 10 2010

GAIN AND LOSS DETAIL

CUSIP #/ PROPERTY DESCRIPTION	DATE SOLD/ ACQUIRED	PROCEEDS OF SALE	COST	GAIN OR LOSS	REG
LONG TERM CAPITAL GAIN (LOSS)					
31331QU47 50000 UNITS OF FFCB AGENCY 4.17% 06/17/2013	01/22/2009 10/10/2007	50,000.00	47,653.75	2,346.25	40
3133XPHP2 100000 UNITS OF FHLB BONDS 4.25% 02/12/2013	02/12/2009 01/30/2008	100,000.00	100,001.02	(1.02)	40
16161ABU1 200000 UNITS OF CHASE MANHATTAN CORP CHASE MANHATTAN BANK 6% 02/15/2009	02/15/2009 05/08/2002	200,000.00	197,261.50	2,738.50	40
31396N2C9 1737.44 UNITS OF FHLMC SERIES 3137 5.125% 12/15/2013	02/17/2009 11/01/2007	1,737.44	1,733.14	4.30	40
31396N2C9 4217.74 UNITS OF FHLMC SERIES 3137 5.125% 12/15/2013	03/16/2009 11/01/2007	4,217.74	4,207.30	10.44	40
31331YYW4 125000 UNITS OF FFCB SOVEREIGN AGENCY CALLABLE 03/24/2009 @ 100.00 2.625% 03/24/2010	03/24/2009 03/19/2008	125,000.00	125,003.80	(3.80)	40

ACCOUNT # 1090000340
TAX ID 55-0754353
FROM 01/01/2009
TO 12/31/2009
FISCAL YEAR: 12/31

UNITED BANK
Gain and Loss Report
OAKLAND FOUNDATION, INC.

PAGE 3
AS OF 02/10/2010
RUN FEB 10 2010

GAIN AND LOSS DETAIL

CUSIP #/ PROPERTY DESCRIPTION	DATE SOLD/ ACQUIRED	PROCEEDS OF SALE	COST	GAIN OR LOSS	REG
LONG TERM CAPITAL GAIN (LOSS) - CONTINUED					
31396N2C9 4586.57 UNITS OF FHLMC SERIES 3137 5.125% 12/15/2013	04/15/2009 11/01/2007	4,586.57	4,575.22	11.35	40
31396N2C9 4309.89 UNITS OF FHLMC SERIES 3137 5.125% 12/15/2013	05/15/2009 11/01/2007	4,309.89	4,299.23	10.66	40
31396N2C9 3679.77 UNITS OF FHLMC SERIES 3137 5.125% 12/15/2013	06/15/2009 11/01/2007	3,679.77	3,670.66	9.11	40
31396N2C9 4254.15 UNITS OF FHLMC SERIES 3137 5.125% 12/15/2013	07/15/2009 11/01/2007	4,254.15	4,243.62	10.53	40
3133XLQR7 50000 UNITS OF FHLB AGENCY 5.52% 07/27/2011	07/27/2009 07/10/2007	50,000.00	50,000.66	(0.66)	40
31396N2C9 3229.08 UNITS OF FHLMC SERIES 3137 5.125% 12/15/2013	08/17/2009 11/01/2007	3,229.08	3,221.09	7.99	40

ACCOUNT # 1090000340
TAX ID 55-0754353
FROM 01/01/2009
TO 12/31/2009
FISCAL YEAR: 12/31

UNITED BANK
Gain and Loss Report
OAKLAND FOUNDATION, INC.

PAGE 4
AS OF 02/10/2010
RUN FEB 10 2010

GAIN AND LOSS DETAIL

CUSIP #/ PROPERTY DESCRIPTION	DATE SOLD/ ACQUIRED	PROCEEDS OF SALE	COST	GAIN OR LOSS	REG
LONG TERM CAPITAL GAIN (LOSS) - CONTINUED					
31396N2C9 2182.79 UNITS OF FHLMC SERIES 3137 5.125% 12/15/2013	09/15/2009 11/01/2007	2,182.79	2,177.39	5.40	40
31396N2C9 1194.95 UNITS OF FHLMC SERIES 3137 5.125% 12/15/2013	10/15/2009 11/01/2007	1,194.95	1,191.99	2.96	40
628530107 1829 SHARES OF MYLAN LABS INC COM	10/09/2009 02/27/1998	29,987.50	16,728.03	13,259.47	40
260543103 600 SHARES OF DOW CHEMICAL COMPANY COMPANY COM	10/09/2009 02/27/1998	15,733.47	18,421.00	(2,687.53)	40
260543103 200 SHARES OF DOW CHEMICAL COMPANY COMPANY COM	10/09/2009 12/13/2002	5,244.49	5,806.75	(562.26)	40
172967101 672 SHARES OF CITIGROUP INC INC	10/09/2009 08/12/1997	3,093.03	17,239.73	(14,146.70)	40
060505104 662 SHARES OF BANK OF AMERICA CORP COMMON STOCK	10/09/2009 03/12/1999	11,493.79	23,521.63	(12,027.84)	40

ACCOUNT # 1090000340
TAX ID 55-0754353
FROM 01/01/2009
TO 12/31/2009
FISCAL YEAR: 12/31

UNITED BANK
Gain and Loss Report
OAKLAND FOUNDATION, INC.

AS OF 02/10/2010
RUN FEB 10 2010

GAIN AND LOSS DETAIL

LONG TERM CAPITAL GAIN (LOSS) - CONTINUED

CUSIP #/ PROPERTY DESCRIPTION	DATE SOLD/ ACQUIRED	PROCEEDS OF SALE	COST	GAIN OR LOSS	REG
46625H100 640 SHARES OF JP MORGAN CHASE & CO COMMON	10/09/2009 08/12/1997	28,971.01	23,423.26	5,547.75	40
464287721 486 SHARES OF ISHARES DJ US TECHNOLOGY SEC	10/09/2009 08/23/2005	25,497.17	23,410.62	2,086.55	40
595635103 481 SHARES OF S&P MIDCAP 400 INDEX DEPOSITARY RECEIPTS (MIDCAP SPIDERS)	10/09/2009 08/27/2001	61,041.45	44,437.29	16,604.16	40
125581AZ1 50000 UNITS OF CIT GROUP INC INC 5.6% 04/27/2011	10/13/2009 08/15/2007	28,497.50	46,907.75	(18,410.25)	40
166764100 70 SHARES OF CHEVRON CORPORATION	10/21/2009 12/13/1928	5,357.86	145.41	5,212.45	40
060505104 126 SHARES OF BANK OF AMERICA CORP COMMON STOCK	10/21/2009 03/12/1999	2,120.36	4,476.93	(2,356.57)	40
172967101 328 SHARES OF CITIGROUP INC INC	10/21/2009 08/12/1997	1,455.37	8,414.63	(6,959.26)	40

ACCOUNT # 1090000340
TAX ID 55-0754353
FRCM 01/01/2009
TO 12/31/2009
FISCAL YEAR: 12/31

UNITED BANK
Gain and Loss Report
OAKLAND FOUNDATION, INC.

AS OF 02/10/2010
RUN FEB 10 2010

GAIN AND LOSS DETAIL

CUSIP #/ PROPERTY DESCRIPTION	DATE SOLD/ ACQUIRED	PROCEEDS OF SALE	COST	GAIN OR LOSS	REG
LONG TERM CAPITAL GAIN (LOSS) - CONTINUED					
260543103 200 SHARES OF DOW CHEMICAL COMPANY COMPANY COM	10/21/2009 12/13/2002	5,222.11	5,806.75	(584.64)	40
46625H100 110 SHARES OF JP MORGAN CHASE & CO COMMON	10/21/2009 08/12/1997	5,044.89	4,025.87	1,019.02	40
595635103 19 SHARES OF S&P MIDCAP 400 INDEX DEPOSITARY RECEIPTS (MIDCAP SPIDERS)	10/21/2009 08/27/2001	2,454.26	1,755.32	698.94	40
628530107 421 SHARES OF MYLAN LABS INC COM	10/21/2009 02/27/1998	6,872.68	3,850.47	3,022.21	40
464287721 39 SHARES OF ISHARES DJ US TECHNOLOGY SEC	10/21/2009 08/23/2005	2,092.20	1,878.63	213.57	40
31396N2C9 1043.8 UNITS OF FHLMC SERIES 3137 5.125% 12/15/2013	11/16/2009 11/01/2007	1,043.80	1,041.22	2.58	40
31396N2C9 1315.68 UNITS OF FHLMC SERIES 3137 5.125% 12/15/2013	12/15/2009 11/01/2007	1,315.68	1,312.42	3.26	40

TOTAL LONG TERM CAPITAL GAIN (LOSS)	796,931.00	801,844.08	(4,913.08)

ACCOUNT # 1090000340
TAX ID 55-0754353
FROM 01/01/2009
TO 12/31/2009
FISCAL YEAR: 12/31

UNITED BANK
Gain and Loss Report
OAKLAND FOUNDATION, INC.

PAGE 7
AS OF 02/10/2010
RUN FEB 10 2010

GAIN AND LOSS DETAIL

CUSIP #/ PROPERTY DESCRIPTION	DATE SOLD/ ACQUIRED	PROCEEDS OF SALE	COST	GAIN OR LOSS	REG
SHORT TERM CAPITAL GAINS DIVIDENDS					
693390700 9149.131 BASIS SHARES OF PIMCO TOTAL RETURN FUND				793.79	65
60934N401 478935.77 BASIS OF FEDERATED #15 TAX FREE MONEY MARKET FUND#15				19.16	70
60934N401 113948.13 BASIS OF FEDERATED #15 TAX FREE MONEY MARKET FUND#15				4.56	70
TOTAL GAIN FROM PARTNERSHIPS, S CORPORATIONS, OR OTHER FIDUCIARIES		1,070.37	0.00	1,070.37	
TOTAL SHORT TERM CAPITAL GAINS DIVIDENDS		1,070.37	0.00	1,887.88	

ACCOUNT # 1090000340
TAX ID 55-0754353
FROM 01/01/2009
TO 12/31/2009
FISCAL YEAR: 12/31

UNITED BANK
Gain and Loss Report
OAKLAND FOUNDATION, INC.

PAGE 8
AS OF 02/10/2010
RUN FEB 10 2010

GAIN AND LOSS DETAIL

CUSIP #/ PROPERTY DESCRIPTION	DATE SOLD/ ACQUIRED	PROCEEDS OF SALE	COST	GAIN OR LOSS	REG
LONG TERM CAPITAL GAINS DIVIDENDS					
693390700 9149.131 BASIS SHARES OF PIMCO TOTAL RETURN FUND				220.81	65
60934N401 478935.77 BASIS OF FEDERATED #15 TAX FREE MONEY MARKET FUND#15				38.31	70
60934N401 113948.13 BASIS OF FEDERATED #15 TAX FREE MONEY MARKET FUND#15				9.12	70
TOTAL GAIN FROM PARTNERSHIPS, S CORPORATIONS, OR OTHER FIDUCIARIES		8.60	0.00	8.60	
TOTAL LONG TERM CAPITAL GAINS DIVIDENDS		8.60	0.00	276.84	

ACCOUNT # 1090000340
TAX ID 55-0754353
FROM 01/01/2009
TO 12/31/2009
FISCAL YEAR: 12/31

UNITED BANK
Gain and Loss Report
OAKLAND FOUNDATION, INC.

AS OF 02/10/2010
RUN FEB 10 2010

GAIN AND LOSS DETAIL

CUSIP #/ PROPERTY DESCRIPTION	DATE SOLD/ ACQUIRED	PROCEEDS OF SALE	COST	GAIN OR LOSS	REG
SEC 1250 CAPITAL GAINS DIVIDENDS					
TOTAL GAIN FROM PARTNERSHIPS, S CORPORATIONS, OR OTHER FIDUCIARIES		43.13	0.00	43.13	
TOTAL SEC 1250 CAPITAL GAINS DIVIDENDS		43.13	0.00	43.13	

ACCOUNT # 1090000340
TAX ID 55-0754353
FROM 01/01/2009
TO 12/31/2009
FISCAL YEAR: 12/31

UNITED BANK
Gain and Loss Report
OAKLAND FOUNDATION, INC.

AS OF 02/10/2010
RUN FEB 10 2010

SUMMARY OF CAPITAL GAINS AND LOSSES

TOTAL SHORT TERM CAPITAL GAIN (LOSS)	4,534.70	
TOTAL SHORT TERM CAPITAL GAINS DIVIDENDS	1,887.88	
NET SHORT TERM CAPITAL GAIN (LOSS)	6,422.58	6,422.58
TOTAL LONG TERM CAPITAL GAIN (LOSS)	(4,913.08)	
TOTAL LONG TERM CAPITAL GAINS DIVIDENDS	276.84	
TOTAL 28% RATE CAPITAL GAINS DIVIDENDS	0.00	
TOTAL SEC 1250 CAPITAL GAINS DIVIDENDS	43.13	
TOTAL SEC 1202 CAPITAL GAINS DIVIDENDS	0.00	
NET LONG TERM CAPITAL GAIN (LOSS)	(4,593.11)	(4,593.11)
NET CAPITAL GAIN (LOSS)		1,829.47

TOTAL GAIN/LOSS FROM SALES WITH UNKNOWN COST/ACQUISITION DATE 0.00

GUIDELINES AND REVIEW PROCEDURES

Oakland Foundation grants are available for West Virginia and northern Vermont tax-exempt 501 (c) (3) organizations in the areas of social services, the arts, education, the environment, health and historic preservation, with an emphasis on social services. Grants are not made to individuals, capital campaigns, for emergency or deficit funding, or for administrative or startup costs.

Please note that the Oakland Foundation is a small family foundation and receives requests totaling four to five times the amount available for distribution.

Three collated sets of the grant application form and all related materials should be sent to The Oakland Foundation, PO Box 3680, Parkersburg, WV 26103

1. Proposals should include the Oakland Foundation grant application form as well as a cover letter setting forth specific objectives, a detailed estimated project budget and the organization's financial statement, including a copy of the most recent IRS Form 990, if one is filed.

2. **Federal** tax-exempt 501(c)(3) status of the applicant under the Internal Revenue Code **must** be documented. State tax exemption certificates do NOT satisfy this requirement.

3. The Foundation's grant program emphasizes institutions and organizations serving the people of the states of West Virginia and northern Vermont.

4. The Foundation will generally consider only one application from an organization in any given year. Applications for the same project in successive years might not be granted.

5. Specific projects are preferred rather than requests for general operating funds. We want to enable self-supporting non-profit organizations to accomplish projects that they otherwise might not be able to do, rather than provide funds for general support.

6. Grant applications of $5000 or less are given priority.

7. Follow-up reports are required upon completion of the project. Organizations which do not submit follow-up reports in a timely fashion will not be considered for further grants.

8. Do not fax, email, or send grants by Federal Express. Allow sufficient time for the post office to receive grants by the due date. Do not submit proposals in binders, covers, or folders. Do not include books, tapes, etc.

REVIEW PROCEDURES

The Directors meet quarterly to consider grant requests. Applications must be received by March 1, June 1, September 1, or December 1. Grants will be awarded by the end of those months. Grants received after the deadline will be included in the following quarter