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Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

2009

Department of the Treasury
Internal Revenue Service

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

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

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

Use the IRS label otherwise, print or type. See Specific Instructions.	Name of foundation JOHN E MORGAN FOUNDATION, INC		A Employer identification number 56-2290010
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite C/O BESSEMER TRUST, 630 FIFTH AVE		B Telephone number (212) 708-9216
	City or town, state, and ZIP code NEW YORK, NY 10111		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 ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 63,655,173.		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check ☒ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		1,411,737.	1,406,201.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		<55,763.>			
b Gross sales price for all assets on line 6a 30,377,562.					
7 Capital gain net income (from Part IV, line 2)			0.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of Goods Sold					
c Gross profit or (loss)					
11 Other income		24,991.	0.		STATEMENT 2
12 Total. Add lines 1 through 11		1,380,965.	1,406,201.		
13 Compensation of officers, directors, trustees, etc		84,740.	0.		84,740.
14 Other employee salaries and wages		1,290.	0.		1,290.
15 Pension plans, employee benefits					
16a Legal fees STMT 3		29,204.	0.		29,204.
b Accounting fees STMT 4		5,000.	0.		5,000.
c Other professional fees STMT 5		73,699.	70,699.		3,000.
17 Interest					
18 Taxes STMT 6		13,465.	13,465.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings		308.	0.		308.
22 Printing and publications					
23 Other expenses STMT 7		24,125.	14,846.		9,279.
24 Total operating and administrative expenses. Add lines 13 through 23		231,831.	99,010.		132,821.
25 Contributions, gifts, grants paid		2,913,574.			2,913,574.
26 Total expenses and disbursements. Add lines 24 and 25		3,145,405.	99,010.		3,046,395.
27 Subtract line 26 from line 12		<1,764,440.>			
a Excess of revenue over expenses and disbursements			1,307,191.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets				Attached schedules and amounts in the description column should be for end-of-year amounts only		
				Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing			1,250.	1,250.
	2	Savings and temporary cash investments		8,214,734.	2,280,554.	2,280,614.
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations STMT 8		16,263,686.	10,209,607.	10,774,668.
	b	Investments - corporate stock STMT 9		30,628,365.	37,183,983.	41,129,247.
	c	Investments - corporate bonds STMT 10		1,734,377.	5,394,086.	5,642,738.
11	Investments - land, buildings, and equipment basis ▶					
	Less: accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other STMT 11		296,000.	306,000.	245,456.	
14	Land, buildings, and equipment basis ▶					
	Less: accumulated depreciation ▶					
15	Other assets (describe ▶ STATEMENT 12)		4,680,448.	4,677,679.	3,581,200.	
16	Total assets (to be completed by all filers)		61,817,610.	60,053,159.	63,655,173.	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
23	Total liabilities (add lines 17 through 22)		0.	0.		
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		61,817,610.	60,053,159.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
29	Retained earnings, accumulated income, endowment, or other funds		0.	0.		
30	Total net assets or fund balances		61,817,610.	60,053,159.		
31	Total liabilities and net assets/fund balances		61,817,610.	60,053,159.		

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	61,817,610.
2	Enter amount from Part I, line 27a	2	<1,764,440.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	60,053,170.
5	Decreases not included in line 2 (itemize) ▶ TRUNCATION	5	11.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	60,053,159.

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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				
b	SEE ATTACHED STATEMENT			
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	30,377,562.	30,439,600.	<55,763.>	
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(i) FMV 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			<55,763.>	
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 <55,763.>
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) If (loss), enter -0- in Part I, line 8		3 N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	2,923,323.	66,048,221.	.044260
2007	3,082,609.	73,687,505.	.041834
2006	1,818,465.	68,247,919.	.026645
2005	1,951,622.	64,570,718.	.030225
2004	1,765,489.	62,018,462.	.028467
2 Total of line 1, column (d)			2 .171431
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 .034286
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 58,359,609.
5 Multiply line 4 by line 3			5 2,000,918.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 13,072.
7 Add lines 5 and 6			7 2,013,990.
8 Enter qualifying distributions from Part XII, line 4			8 3,046,395.

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		1	13,072.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		3	13,072.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	13,072.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a 25,000.	7	25,000.
b Exempt foreign organizations - tax withheld at source	6b	8	
c Tax paid with application for extension of time to file (Form 8868)	6c	9	
d Backup withholding erroneously withheld	6d	10	11,928.
7 Total credits and payments. Add lines 6a through 6d		11	0.
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be credited to 2010 estimated tax	11,928. Refunded		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☐ \$ 0. (2) On foundation managers ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ PA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	X	
14	The books are in care of ▶ BESSEMER TRUST COMPANY Telephone no ▶ (212) 651-1048 Located at ▶ 630 FIFTH AVENUE 34TH FLOOR, NEW YORK, NY ZIP+4 ▶ 10111			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A			

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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)? Organizations relying on a current notice regarding disaster assistance check here ▶ ☐	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? ☐ Yes ☒ No If "Yes," list the years ▶		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions) 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 ▶		
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

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☒ Yes ☐ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

Organizations relying on a current notice regarding disaster assistance check here

☐

5b

X

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.

(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
HARRY LODER C/O BESSEMER TRUST CO N/A ; 630 FIFTH NEW YORK, NY 10111	PRESIDENT/CHAIRMAN/DIRECTOR 5.00	21,185.	0.	0.
JAMES ZIGMANT C/O BESSEMER TRUST CO N/A ; 630 FIFTH NEW YORK, NY 10111	TREASURER/VICE CHAIRMAN/DI 5.00	21,185.	0.	0.
JOHN EDDY C/O BESSEMER TRUST CO N/A ; 630 FIFTH NEW YORK, NY 10111	VICE PRESIDENT/DIRECTOR 5.00	21,185.	0.	0.
JAY WAGNER (PAID TO STEVENS AND LEE) C/O BESSEMER TRUST CO N/A ; 630 FIFTH NEW YORK, NY 10111	SECRETARY/DIRECTOR 5.00	21,185.	0.	0.

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

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

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

0

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
BESSEMER TRUST 630 FIFTH AVENUE, NEW YORK, NY 10111	INVESTMENT FEES	70,699.

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

0

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

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

	Expenses
1 N/A	
2	
3	
4	

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

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

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

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

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	53,864,511.
b	Average of monthly cash balances	1b	5,383,823.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	59,248,334.
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	59,248,334.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	888,725.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	58,359,609.
6	Minimum investment return. Enter 5% of line 5	6	2,917,980.

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

1	Minimum investment return from Part X, line 6	1	2,917,980.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	13,072.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	13,072.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,904,908.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	2,904,908.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	2,904,908.

Part XII Qualifying Distributions (see 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	3,046,395.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
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	3,046,395.
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	5	13,072.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	3,033,323.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				2,904,908.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			156,766.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 3,046,395.				
a Applied to 2008, but not more than line 2a			156,766.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				2,889,629.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:	0.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				15,279.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010 Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
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						
4 Dividends and interest from securities				14	1,411,737.	
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				01	24,991.	
8 Gain or (loss) from sales of assets other than inventory				18	<55,763.>	
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.		1,380,965.	0.
13 Total Add line 12, columns (b), (d), and (e)					13	1,380,965.

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

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 | | X |
| | (2) Other assets | | X |
| b | Other transactions | | |
| | (1) Sales of assets to a noncharitable exempt organization | | X |
| | (2) Purchases of assets from a noncharitable exempt organization | | X |
| | (3) Rental of facilities, equipment, or other assets | | X |
| | (4) Reimbursement arrangements | | X |
| | (5) Loans or loan guarantees | | X |
| | (6) Performance of services or membership or fundraising solicitations | | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | | 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. | | |

[illegible]

- 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		

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.

Sign Here	Signature of officer or trustee <i>Harry Loder</i>		Date <i>11-1-10</i>	Title <i>President</i>	
	Paid Preparer's Use Only Preparer's signature <i>Kevin M Barry</i> Date <i>10-28-10</i> Check if self-employed ☐ Preparer's identifying number <i>000369984</i>	Firm's name (or yours if self-employed) address and ZIP code BESSEMER TRUST 630 FIFTH AVENUE, 34TH FLOOR NEW YORK, NY 10111-0333		EIN Phone no <i>212-708-9100</i>	

Form **990-PF** (2009)

JOHN E MORGAN FOUNDATION, INC

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	PUBLICLY TRADED SECURITIES	P	VARIOUS	VARIOUS
b	PUBLICLY TRADED SECURITIES	P	VARIOUS	VARIOUS
c	OWPCF 13-3858787	P	VARIOUS	07/02/09
d	OWVC 13-3911074	P	VARIOUS	08/24/09
e	OWVC 13-3911074	P	VARIOUS	08/24/09
f	CLASS ACTIONS	P	VARIOUS	VARIOUS
g				
h				
i				
j				
k				
l				
m				
n				
o				

(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 1,734,414.		1,742,627.	<8,213.>
b 28,628,532.		28,696,973.	<68,441.>
c			<3,404.>
d			9,359.
e			320.
f 14,616.			14,616.
g			
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			<8,213.>
b			<68,441.>
c			<3,404.>
d			9,359.
e			320.
f			14,616.
g			
h			
i			
j			
k			
l			
m			
n			
o			

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	<55,763.>
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) If (loss), enter "-0-" in Part I, line 8 }	3	N/A

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
BESSEMER TRUST A/C 8G5723	1,315,183.	0.	1,315,183.
BESSEMER TRUST A/C 8G5731	94,530.	0.	94,530.
FROM PASS THROUGH 13-3858787	1,952.	0.	1,952.
FROM PASS THROUGH 13-3911074	72.	0.	72.
TOTAL TO FM 990-PF, PART I, LN 4	1,411,737.	0.	1,411,737.

FORM 990-PF	OTHER INCOME	STATEMENT	2
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
REFUND	24,991.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	24,991.	0.	

FORM 990-PF	LEGAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEE	27,925.	0.		27,925.
LEGAL EXPENSES	1,279.	0.		1,279.
TO FM 990-PF, PG 1, LN 16A	29,204.	0.		29,204.

FORM 990-PF	ACCOUNTING FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FINANCIAL SERVICES FEE	5,000.	0.		5,000.	
TO FORM 990-PF, PG 1, LN 16B	5,000.	0.		5,000.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INVESTMENT SERVICES FEE	70,699.	70,699.		0.	
ADVISORY FEE	3,000.	0.		3,000.	
TO FORM 990-PF, PG 1, LN 16C	73,699.	70,699.		3,000.	

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAX PAID	13,465.	13,465.		0.	
TO FORM 990-PF, PG 1, LN 18	13,465.	13,465.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FROM PASS THRU 13-3858787	2,730.	2,730.		0.	
FROM PASS THRU 13-3911074	12,116.	12,116.		0.	
MISCELLANEOUS EXPENSES	1,972.	0.		1,972.	
SMALL FDN. DUES	495.	0.		495.	
ENGLE-HAMBRIGHT	6,812.	0.		6,812.	
TO FORM 990-PF, PG 1, LN 23	24,125.	14,846.		9,279.	

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	8
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
SEE SCHEDULE ATTACHED - 8G5723	X		9,489,241.	10,016,210.
SEE SCHEDULE ATTACHED - 8G5731	X		720,366.	758,458.
TOTAL U.S. GOVERNMENT OBLIGATIONS			10,209,607.	10,774,668.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			10,209,607.	10,774,668.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE SCHEDULE ATTACHED - 8G5723	34,570,643.	38,309,350.
SEE SCHEDULE ATTACHED - 8G5731	2,613,340.	2,819,897.
TOTAL TO FORM 990-PF, PART II, LINE 10B	37,183,983.	41,129,247.

FORM 990-PF	CORPORATE BONDS	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE SCHEDULE ATTACHED - 8G5723	5,055,874.	5,288,489.
SEE SCHEDULE ATTACHED - 8G5731	338,212.	354,249.
TOTAL TO FORM 990-PF, PART II, LINE 10C	5,394,086.	5,642,738.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	11
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE SCHEDULE ATTACHED - 8G5731	COST	306,000.	245,456.
TOTAL TO FORM 990-PF, PART II, LINE 13		306,000.	245,456.

FORM 990-PF	OTHER ASSETS	STATEMENT	12
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
OLD WESTBURY PRIVATE CAPITAL	210,775.	181,533.	118,190.
OLD WESTBURY VENTURE CAPITAL	306,373.	284,950.	50,345.
SEE SCHEDULE ATTACHED-8G5723	4,163,300.	4,211,196.	3,412,665.
TO FORM 990-PF, PART II, LINE 15	4,680,448.	4,677,679.	3,581,200.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 13

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
ACCESS SERVICES, INC. FORT WASHINGTON, PA	CAPITAL IMPROVEMENTS	PUBLIC CHARITY	100,000.
ADAM BACHERT-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	2,500.
AMANDA BELFIORE-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	1,250.
AMANDA WATSULA-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
AMERICAN CANCER SOCIETY LANSFORD, PA	N/A GENERAL OPERATIONS	PUBLIC CHARITY	10,000.
AMERICAN HOSE CO. #1 OF TAMAQUA TAMAQUA, PA	GENERAL OPERATIONS	PUBLIC CHARITY	10,000.
AMERICAN RED CROSS IN SCHUYKILL & NORTHUMBERLAND CO. SCHUYKILL, PA	FOR RESPONSE VEHICLE	PUBLIC CHARITY	39,000.
ANDREA FEATHERS- SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	6,068.

ANTHONY MAFF-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	4,500.
BLOOMSBURG UNIVERSITY FOUNDATION BLOOMSBURG, PA	N/A EDUCATION/SCHOLARSHIPS	PUBLIC CHARITY	550,000.
BOROUGH OF TAMAQUA TAMAQUA, PA	N/A PUBLIC SECURITY FACILITIES	PUBLIC CHARITY	167,000.
BOROUGH OF TAMAQUA TAMAQUA, PA	N/A PUBLIC RECREATION FACILITIES	PUBLIC CHARITY	60,000.
CHOR YOUTH & FAMILY SERVICES, INC. READING, PA	EDUCATION	PUBLIC CHARITY	400,000.
CODY LYNN PEARSON-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	2,500.
ERIK MCCANN-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
ERIKA BARRON-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
ERIN TROXELL-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	2,500.
GABRIELLE SMARR-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.

HERSEY MEDICAL CENTER HERHSEY, PA	MEDICAL	PUBLIC CHARITY	1,200,000.
JAMIE CLEMSON-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
JESSE KABANA-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
JESSICA BENSINGER-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
KRESSA DOWLING-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
KYLE KLIMOWITCH-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	2,500.
KYLE NEVENGLOSKY-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
LAUREN MOYER-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
LEHIGH CARBON COMMUNITY COLLEGE (FALL SEMESTER) LEHIGH, PA	N/A SCHOLARSHIPS-LIST ATTACHED	PUBLIC CHARITY	88,489.
LEHIGH CARBON COMMUNITY COLLEGE (SPRING SEMESTER) SCHNECKSVILLE, PA	N/A SCHOLARSHIPS-LIST ATTACHED	PUBLIC CHARITY	78,266.

LEHIGH CARBON COMMUNITY COLLEGE (SUMMER SEMESTER) LEHIGH, PA	N/A SCHOLARSHIPS-LIST ATTACHED	PUBLIC CHARITY	11,848.
LEHIGH CARBON COMMUNITY COLLEGE LEHIGH, PA	N/A EDUCATION	PUBLIC CHARITY	25,000.
LOGAN MONACO-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
MARIAN HIGH SCHOOL TAMAQUA, PA	EDUCATION	PUBLIC CHARITY	16,500.
MEGAN INAMA- SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
MICHAEL RITSICK SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
RYAN O'DONNELL SCHLOARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
SAMANTHA MILLER SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
SCHUYLKILL UNITED WAY SCHUYKILL, PA	GENERAL OPERATIONS	PUBLIC CHARITY	25,000.
SUZANNE TRAPANI-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	1,076.

JOHN E MORGAN FOUNDATION, INC			56-2290010
TAMAQUA AREA MEALS ON WHEELS TAMAQUA, PA	N/A GENERAL OPERATIONS	PUBLIC CHARITY	15,000.
TAMAQUA AREA SCHOOL DISTRICT TAMAQUA, PA	N/A EDUCATION	PUBLIC CHARITY	28,000.
TANYA WEHR-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	2,578.
THE CHILDREN'S HOME OF EASTON, INC. EASTON, PA	NONE EDUCATION	PUBLIC CHARITY	10,000.
TRAVERS SCHMIDT- SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
WAYDE WILLIAMS-SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
WILLIAM JAMES SCHOLARSHIP	NONE EDUCATION	INDIVIDUAL	3,000.
TOTAL TO FORM 990-PF, PART XV, LINE 3A			2,913,575.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	11/18/09	Tamaqua	HS	Class of	2008	Tot	162 grads		100	applied			Total				
2	Marian	L Snyder	Jr.	Cur.	Cr/sem												
3	First	Last	Sr.	Cr	Suc	Cr.	Deg.	FAFSA	LCCC	Morgan	Pell	State	Tuit &	Morgan	Cum.	Acad	
4	Name	Name	Yr.	Fa.09	Comp.	Comp.	Prgm.	Submid	app.	app	Grant	Grant	Fees	Amt.	GPA	no	De
5	Amanda	Alonge	L00201674	yes	12	36	HSP	04/08/09	1/14/08	1/8/08	\$2,675		\$ 1,650		3.14	9cr?	obligate
6	Lucas	Arndt	L00202182	yes	0	0	LIBA	03/31/08	1/8/08	1/8/08			\$ -		0 Y		
7	Justin	Balliet	L00198937	yes	13	16	CGD	06/10/09	12/6/07	12/6/07			\$ 1,650	\$ 1,650	3.54		\$122.25
8	Matthew	Benek	L00011467	yes	16	12	CMMA	02/24/09	12/20/07	1/8/08		\$ 394	\$ 1,650	\$ 1,256	3.38		
9	Austin	Bennage	L00202412	yes	0	0	LAWC		1/1/08	1/8/08			\$ -				
10	Alicia	Bennett	L00202417	yes	13.5	16	PREADN	03/25/09	1/14/08	1/8/08	\$2,675	\$ 285	\$ 1,650		2.72		
11	Carolyn	Bobayak	L00198927	yes	0	3	PREADN	03/31/08	11/29/07	12/3/07			\$ -		1.38		
12	Dezaray	Boerner	L00198444	yes	0		PREADN	03/31/08	1/1/07	11/2/07	INC		\$ -				
13	Miranda	Bonetsky	L00198936	yes	0		ACCC	02/15/08	1/14/08	1/8/08			\$ -				
14	Justin	Boyer	L00198445	yes	0		COT		2/1/08	3/27/08			\$ -				
15	Justin	Brobst	L00183850	yes	13	6.5	LIBA	04/05/09	2/27/08	1/14/08			\$ 1,650		1.28 Y		
16	Michael	Brode	L00198915	yes	0		CJA	02/19/08	4/1/08	12/18/07			\$ -				
17	Ashley	Caratini	L00204000	yes	0	0	EDUA	04/07/08	2/18/08	1/28/08			\$ -		0.00		
18	Ashly	Casler	L00198930	yes	12.5	12	BUAA	04/01/09	12/20/07	1/8/08	\$2,675		\$ 1,650		3.17		
19	Aaron	Chromiak	L00198917	yes	0		HSP		2/1/08	1/8/08			\$ -				
20	Steven	Clemson	L00198935	yes	0		Pre-PTA	02/25/08	1/14/08	1/8/08			\$ -				
21	Amanda	Conahan	L00199304	yes	15	16	LIBA	03/09/09	10/25/07	1/8/08			\$ 1,650	\$ 1,650	3.66		
22	Michael	Conforti	L00201493	yes	14	13	Pre-NURC	09/14/09	12/10/07	1/8/08			\$ 1,650	\$ 1,650	3.19		
23	Granted an appeal by Morgan Foundation because of late FAFSA filing.																
24	Julia	Cooke	L00197137	yes	0		PSYS	01/29/08	1/14/08	1/8/08			\$ -				
25	Shane	Coombe	L00147026	yes	0		ACC	02/19/08	1/14/08	1/8/08			\$ -				
26	Eric	Craigle	L00202433	yes	0		LIBA		1/14/08	1/8/08			\$ -				
27	Amanda	Creveling	L00198934	yes	0		EDS	03/13/08	1/14/08	1/8/08			\$ -				
28	Kristy	Davis	L00198447	yes	12	12	FSDA	04/21/09	1/9/08	1/8/08	\$2,675		\$ 1,650		2.50		
29	Karla	Diekman	L00183851	yes	0		LIBA		2/15/08	1/21/08			\$ -				
30	Megan	Ensel	L00198906	yes	0		PREADN		1/14/08	1/8/08			\$ -				
31	Jessica	Estremara	L00202213	yes	12.5	12	EDUA	02/11/09	1/8/08	1/8/08			\$ 1,650	\$ 1,650	3.25		
32	Kyle	Evans	L00184771	yes	0		ACC	02/19/08	1/7/07	11/8/07			\$ -				
33	Blake	Ferrich	L00079168	yes	15	15	DAP	03/02/08	12/6/07	12/6/07	\$650		\$ 1,650	\$ 1,000	2.96		
34	Benjamin	Fink	L00036475	yes	13	15.5	LIBA	03/24/09	1/14/08	1/8/08			\$ 990	\$ 990	2.81		
35	Mark	Focht	L00201671	yes	0	0	UNDC	04/02/08	1/11/08	1/8/08			\$ -		1.32		
36	Tiffany	Fogarty	L00198923	yes	17	14	LIBA	03/15/09	1/11/08	1/8/08	\$2,050		\$ 1,650		4.00		
37	Mark	Foose	L00198427	yes	0		METS	03/04/08	11/29/07	12/3/07			\$ -		0.50		
38	Corey	Francis	L00198912	yes	15	12	LIBA	04/11/09	2/18/08	12/19/07	\$2,675	\$ 394	\$ 1,650		3.25		
39	Jodi	Funk	L00201325	yes	16	15	EOE	02/27/09	12/5/07	12/7/07			\$ 1,650	\$ 1,650	2.60		
40	Travis	Garris	L00202426	yes	0		CJAA		1/14/08	1/8/08			\$ -				
41	Elena	Gatens	L00203942	yes	0		BUAA		2/15/08	12/19/07			\$ -				
42	Cory	Gibson	L00205320	yes	15	12	CJA	03/24/08	3/26/08	3/25/08			\$ -		2.71	no farsa	
43	Joshua	Green	L00204802	yes	12.5	3	DAP	03/31/09	3/7/08	12/19/07	\$1,450		\$ 1,650		1.00 Y		
44	Michael	Green	L00198449	yes	0	0	ATS	03/27/08	2/1/08	3/17/08			\$ -		2.33		
45	Donald	Groff	L00200825	yes	0	6	LIBA	03/21/08	11/20/07	11/26/07			\$ -		1.00 Y		
46	Cole	Gursky	L00202703	yes	18	15	HAC	03/22/09	2/14/08	1/26/08			\$ 1,650	\$ 1,650	2.50		

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
	First	Last	ID#	Sr.	Cr.	Suc	Cr.	Deg	FAFSA	LCCC	Morgan	Pell	State	Tuit &	Morgan	Cum.	no	De
	Name	Name		Yr.	Fa 09	Comp.	Comp.	Prgm.	Submid	app	app.	Grant	Grant	Fees	Amt.	GPA	9cr?	obligate
3	Patrick	Guy	L00204234	yes	7	10	23	ENG	03/04/09	2/25/08	2/1/08	\$1,900		\$ -		3.39		
4	Carly	Hankins	L00039894	yes	0			ENG	02/08/08	3/20/08	1/20/08			\$ -				
47	Ashley	Hartung	L00202413	yes	13	6	15	LIBA	04/01/09	1/11/08	1/8/08			\$ -	\$ 1,650	2.00		
49	Samantha	Heck	L00198924	yes	16	11	29	LIBA	03/30/09	1/14/08	1/8/08	\$1,650	\$ 372	\$ 1,650		2.81		
50	Tara	Heyer	L00198933	yes	0			PREADN	02/11/08	1/11/08	1/8/08			\$ -				
51	Kyle	Hoppes	L00204430	yes	0		15.5	BMG	03/05/08	2/27/08	2/26/08			\$ -		3.00		
52	Sarah	Hoppes	L00202393	yes	15	26	41	EDUA	02/28/09	1/11/08	1/8/08	\$2,650	\$ 372	\$ 1,650		3.05		
53	Brandon	Hoover	L00205321	yes	0			LIBA	03/26/08	3/26/08	3/25/08			\$ -				
54	Meaghan	Imbody	L00204236	yes	18	15	27	CFSS	03/31/09	2/25/08	2/18/08	\$1,100	\$ 263	\$ 1,650	\$ 287	3.75		
55	Beth	John	L00198916	yes	0			ECE	03/29/08	2/11/08	1/22/08			\$ -				
56	Daniel	Keach	L00204375	yes	12			GRDA	02/04/09	2/26/08	1/3/08	\$2,675	\$ 395	\$ 1,650		2.57		
57	Andrea	Kenopansky	L00200277	yes	13.5	12	28	ACC	03/27/09	10/31/07	11/1/07			\$ -				
58	Danielle	Kleman	L00202419	yes	0			LIBA	01/14/08	1/14/08	1/8/08			\$ -				
59	Stephanie	Kopunek	L00202410	yes	0	0	0	EDUA	02/26/08	1/11/08	1/8/08			\$ -		0.00		
60	Nathaniel	Kotzmeyer	L00190412	yes	13	10	19	CJA	03/10/09	10/25/07	10/29/07	\$2,675		\$ 1,650		3.54		
61	Natasha	Kozak	L00205255	yes	15	15	15	LIBA	04/01/09	3/20/08	3/17/08			\$ 1,650	\$ 1,650	3.60		
62	Usabeth	Kuklis	L00192552	yes	Dw/d			LIBA	06/27/08	3/29/07	3/27/07			\$ -				
63	Kyle	Kunkel	L00204251	yes	0			SPMS	03/31/08	2/25/08	3/6/08			\$ -				
64	Ashley	Leibensperger	L00184424	yes	13	23	51.5	NSLS	02/08/09	11/20/07	11/10/07	\$850	\$ 395	\$ 1,650	\$ 405	3.94		
65	Kristina	Leiby	L00200828	yes	16	12	27	CMMA	03/30/09	11/20/07	11/26/07			\$ 1,650	\$ 405	3.56		
66	Megan	Melo	L00202411	yes	0		9	LIBA	04/01/08	1/14/08	1/8/08			\$ -		1.28		
67	Marlin	Minahan	L00198440	yes	0			COM	12/12/07	1/14/08	1/8/08			\$ -				
68	Matthew	Moyer	L00200046	yes	13	15.5	31.5	CISS	02/10/09	1/14/08	1/8/08			\$ 1,650	\$ 1,650	2.63		
69	Nathan	Moyer	L00183860	yes	0		11	LIBA	03/02/08	3/11/08	1/8/08			\$ -		1.18		
70	Marissa	Mussoline	L00198142	yes	0			LIBA	04/22/08	3/17/08	12/19/07			\$ -				
71	Kyle	Nevinglosky	L00198913	yes	0			ACC	02/11/08	1/14/08	1/8/08			\$ -				
72	Danielle	Ohl	L00198925	yes	13.5	28	44	CMMA	03/26/09	11/5/07	11/5/07	\$1,050	\$ 394	\$ 1,650	\$ 206	2.80	\$ 209	
73	Lacy	Pajakinas	L00072238	yes	13	9	33	LIBA	03/26/09	1/14/08	1/8/08	\$1,450		\$ 1,650	\$ 200	3.48		
74	April	Parsons	L00191674	yes	0			FSDA	03/31/08	1/14/08	1/8/08			\$ -		0.00 Y		
75	Dmitry	Partin	L00022054	yes	0			GRDA	03/23/08	2/25/08	2/14/08			\$ -				
76	Brittney	Pester	L00202409	yes	12	9	15	LIBA	03/30/09	1/11/08	1/8/08	\$2,650		\$ 1,650		3.25		
77	Brittany	Phillipeck	L00202424	yes	0		12.5	PSYS	02/12/08	1/14/08	1/8/08			\$ -		1.16		
78	Tiffany	Pickett	L00205319	yes	15	13	28.5	PSYS	01/16/09	3/26/08	12/19/07	\$2,675		\$ 1,650		3.47		
79	Travis	Pitts	L00203301	yes	0			HRTS	02/22/08	2/11/08	10/19/07			\$ -				
80	Nicholas	Pontoski	L00205649	yes	13	16	25	LIBA	04/30/09	4/1/08	2/17/08			\$ 1,670	\$ 1,670	2.41		
81	Mykel	Postupack	L00191796	yes	15	14	30	KBD	03/31/09	1/8/08	1/8/08			\$ 1,650	\$ 1,650	2.87		
82	Tiffany	Ray	L00202425	yes	0			BMG	04/01/08	1/14/08	1/8/08			\$ -				
83	Shelree	Regisford	L00198940	yes	0			UNDC	01/23/08	11/14/07	1/8/08			\$ -				
84	Samantha	Richardson	L00198455	yes	0	0	3	UNDC	03/20/08	1/14/08	1/8/08	INC		\$ -		0.00 Y		
85	Hannah	Riotta	L00198932	yes	0			LIBA	01/14/08	1/14/08	1/8/08			\$ -				
86	Andrea	Rivadeneira	L00200696	yes	13	12	21	Pre-PTA	03/25/09	11/14/07	11/16/07	\$2,400	\$ 385	\$ 1,650		3.86		
87	Kerney	Rojas	L00200827	yes	12			LIBA	03/26/09	11/20/07	11/26/07	\$2,675		\$ 1,650				
88	Isiah	Roper	L00202408	yes	0	3	12	BMG	03/31/08	1/13/08	1/8/08			\$ -		0.00		
89	Cody	Sassaman	L00198926	yes	0			EDUA	01/28/08	2/13/08	1/21/08			\$ -				

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
	11/18/09		Tamaqua Snyder	HS	Class of	2009	Tol.							Total			Acad	
3	Marlan	L		Jr.	Cur.	Cr/sem								Tuit & Fees	Morgan Amt.	Cum. GPA	Prob?	De
4	ID#	First	Last	Sr.	Cr	Suc	Comp.	Deg.	FAFSA	LCCC	Morgan	Pell	State				no	obligate
5		Name	Name	Yr.	Fa 08	Comp.	Comp.	Pign.	Submid	app.	app.	Grant	Grant					
1	L00212284	LINDSEY	AHARONIAN	YES	0			LIBA	4/6/09	10/29/08	10/24/08	\$2,650		\$0				
2	L00212443	SALLY	ALONGE	YES	13			FSDA	3/27/09	11/4/08	10/24/08			\$1,650				
3	L00198442	KYLE	APPLEGATE	YES	0			CST	no fafsa	10/20/08	3/11/09			\$0				
4	L00213915	CHRISTOPHER	ARCAND	YES	15			DAPA	3/11/09	11/11/08	10/24/08		\$394	\$1,650	\$1,258			
5	L00212248	ELIZABETH	ARGALL	YES	no	attend		LIBA		10/29/08	10/24/08			\$0				
6	L00198461	JOHN	BARTHOLOMEW	YES	0			EGRS	no fafsa	11/11/08	10/24/08			\$0				
7	L00214253	KRISTEN	BEHR	YES	13			BMG	3/31/09	11/17/08	10/24/08		\$329	\$1,650	\$1,321			
8	L00212243	JESSICA	BENSINGER	YES	no	attend		LIBA	1/29/09	11/11/08	10/24/08			\$0				
9	L00200156	SARAH	BENSINGER	YES	12			ACCC	3/31/09	10/30/08	11/5/08	Needs	SS#	\$1,650	\$1,650			
10	L00202768	FRANCIS	BETZ	YES	0			CJAA		11/11/08	10/24/08			\$0				
11	L00213495	STEPHANIE	BLAKER	YES	16			ECE	2/9/09	10/29/08	10/24/08			\$1,650	\$1,650			
12	L00201114	DEVIN	BODMAN	YES	9			LIBA	3/16/09	2/4/09	2/19/09	\$2,007		\$990				
13	L00155055	TRAVIS	BOERNER	YES	0			LIBA	3/10/09	10/20/08	10/24/08			\$0				
14	L00213394	AARON	BOWER	YES	0			FSM	no fafsa	10/27/08	10/24/08			\$0				
15	L00213523	BRITTANY	BOWMAN	YES	12			BMG	3/21/09	11/5/08	10/24/08	\$2,675	\$395	\$1,650				
16	L00213705	KRYSTAL	BRADFORD	YES	12			EDUA	3/7/09	11/4/08	10/24/08		\$372	\$1,650	\$1,278			
17	L00129467	GODY	BRODE	YES	12			HUMA	2/23/09	10/31/08	10/24/08			\$0				
18	L00214151	CLARISSA	CHAKA	YES	0			LIBA	3/30/09	11/12/08	10/24/08		\$307	\$1,650	\$1,343			
19	L00121163	JOSEPH	CIERLITSKY	YES	0			LIBA	3/17/08	10/20/08	10/24/08		SS#	\$0				
20	L00213917	ALEXANDER	COLEMAN	YES	0			EDUA		11/11/08	10/24/08	Needs		\$0				
21	L00194284	SANDRA	COOMBE	YES	0			LIBA	no fafsa	11/4/08	10/24/08			\$0				
22	L00212246	LYNN	DAVIES	YES	13			LIBA	3/30/09	11/12/08	10/24/08	\$2,675		\$1,650				
23	L00212277	MOLLIE	DEVLIN	YES	0			LIBA	1/12/09	10/31/08	10/24/08			\$0				
24	L00214152	NICK	EDMONDS	YES	15.5			ARTA	3/31/09	11/17/08	10/24/08							
25	L00214156	RYAN	FANNOCK	YES	0			SPMS	3/24/09	11/12/08	10/24/08	Needs		\$1,650	\$1,650			
26	L00212485	ROBERT	FELTY	YES	0			CSIS	3/13/09	11/12/08	10/24/08		DRN	\$0				
27	L00214153	KAITLYN	FLACK	YES	0			SPMS	3/25/09	10/8/08	10/5/08			\$0				
28	L00121148	CHLOE	FLOYD	YES	0			SPMS	no fafsa	11/12/08	10/24/08			\$0				
29	L00121146	KATIE	FLOYD	YES	0			EDUA	2/27/09	10/31/08	10/24/08			\$0				
30	L00218974	JARRED	FOLWEILER	YES	12			ACC	2/27/09	10/29/08	10/24/08			\$0				
31	L00218760	MICHAEL	FANNOCK	YES	13			LIBA	3/27/09	4/1/09	4/1/09			\$1,650	\$1,650			
32	L00213494	MOLLY	FREDERICK	YES	12			ELTC	3/13/09	3/27/09	3/25/09			\$1,650	\$1,650			
33	L00214131	ALYSA	FREY	YES	15			LIBA	3/4/09	10/20/08	10/8/08	\$2,675		\$1,650	\$1,650			
34	granted an	appeal for late	FRYER	YES	12			PSYS	8/3/09	11/12/08	10/24/08			\$1,650	\$1,650			
35	L00147098	HAROLD	FRYER	YES	12			EGRS	2/20/09	10/31/08	10/24/08		\$307	\$1,650	\$1,343			
36	L00212265	DEREK	FULMER	YES	13			LIBA	1/16/09	11/6/08	10/24/08			\$1,650	\$1,650			
37	L00213918	JACQUELYN	GENERY	YES	0			LIBA	no fafsa	11/11/08	10/24/08			\$0				
38	L00213514	SARAH	GORGOS	YES	15			LIBA	10/8/09	10/29/08	10/24/08			\$1,650	\$1,650			
39	blanket	waiver of late	FAFSA filing	YES	0							Needs	DRN	\$0				
40	L00212253	MAX	GRIFFITHS	YES	0			LIBA	3/2/09	11/4/08	10/24/08		DRN	\$0				
41	L00212250	ROBERT	GUTH	YES	no	attend		LIBA	2/23/09	10/27/08	10/24/08	Needs		\$0				

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
	11/18/09		Tamaqua	HS	Class of	2009	Tot							Total			Acad	
2	Marian	L	Snyder	Jr.	Cur. Cr/sem									Tuit &	Morgan	Cum.	Prob?	
3			Last	Yr.	Cr.	Comp.	Cr.	Deg.	FAFSA	LCCC	Morgan	Pell	State	Fees	Amt.	GPA	no	De
4	ID#	Name	Name	Yr.	Cr.	Comp.	Cr.	Pgm.	Submitd	app.	app	Grant	Grant				9cr?	obligate
47	L00003444	CHARLES	HANSLER	YES	16			LIBA	2/25/09	11/11/08	10/24/08	Needs	SS#	\$0	\$1,400			
48	L00214127	BRIAN	HARTMAN	YES	0			EGRS	3/23/09	11/12/08	10/24/08	Needs		\$0				
49	L00213332	TAMARA	HASPE	YES	12			HUS	3/23/09	11/12/08	10/24/08	Needs		\$0				
50	L00212268	KERRI	HEGARTY	YES	0			LIBA	no falsa	11/6/08	10/24/08			\$0				
51	L00214230	LINDSAY	HEISLER	YES	14			LIBA	3/22/09	11/14/08	10/24/08			\$1,650	\$1,650			
52	L00212244	NICOLE	HEYER	YES	no	attend		CJAA	2/11/09	10/29/08	10/24/08			\$0				
53	L00213164	AMANDA	HILL	YES	12			LIBA	2/27/09	10/21/08	10/24/08	\$2,675	\$394	\$1,650	INC			
54	L00181799	JASON	HILL	YES	12			CJAA	4/30/09	10/27/08	10/24/08			\$1,650				
55	L00212488	SHANNA	HOBEN	YES	12			ECE	3/9/09	10/8/08	9/24/08	\$2,600	\$373	\$1,650				
56	L00214250	VINCENT	HOFSTETTER	YES	14			EET	1/3/09	11/17/08	10/24/08	\$2,007		\$1,650				
57	L00213342	LAUREN	HOPE	YES	13.5			LIBA	3/31/09	10/24/08	10/21/08			\$1,650	\$1,650			
58	L00212486	JUSTIN	HOPPE	YES	15			COM	3/18/09	10/8/08	10/1/08			\$1,650	\$1,650			
59	L00213393	ANTHONY	HOUSER	YES	0			CJAA	no falsa	10/27/08	10/24/08			\$0				
60	L00214252	LOUISE	HUEGEL	YES	0			CSIS	no falsa	11/17/08	10/24/08			\$0				
61	L00218455	JOSEPH	HUTTA	YES	12.5			PSYS	3/31/09	3/18/09	3/17/09	\$2,675		\$1,650				
62	L00214149	ALEXANDER	JONES	YES	no	attend		LIBA	1/26/09	11/12/08	10/24/08			\$0				
63	L00188314	GHELSEA	JONES	YES	0			KUBA	1/21/09	3/11/09	3/5/09	Needs	DRN	\$0				
64	L00210491	KELSEY	JONES	YES	0			LIBA	2/17/09	11/14/08	10/24/08	Needs	SS#	\$0				
65	L00212442	TIMOTHY	JORDAN	YES	0			DVPA	1/21/09	11/4/08	10/24/08	Needs	DRN	\$0				
66	L00213388	CATHERINE	KABANA	YES	0			FSM	no falsa	10/24/08	10/27/08			\$0				
67	L00223513	JESS	KABANA	YES	no	attend		LIBA	2/18/09	11/4/08	10/24/08			\$0				
68	L00204375	DANIEL	KEACH	YES	12			GRDA	2/5/09	10/15/08	10/2/08	\$2,675	\$395	\$1,650				
69	L00213816	NICOLE	KEICH	YES	12			CJAA	2/17/09	11/6/08	10/24/08	\$2,200		\$1,650				
70	L00212511	KRISTIN	KISTLER	YES	13			LIBA	1/26/09	10/8/08	9/27/08			\$1,650	\$1,650			
71	L00212275	MEGHAN	KISTLER	YES	0			NSLS	3/31/09	11/12/08	10/24/08			\$0				
72	L00212272	BRIANA	KOTCH	YES	no	attend		LIBA	3/10/09	10/29/08	10/24/08			\$0				
73	L00212417	KRISTY	KUNKLE	YES	9			ECE	3/11/09	10/6/08	9/22/08	\$2,007		\$990				
74	L00212255	TYLER	KUNKLE	YES	0			EGRD	1/27/09	10/29/08	10/24/08	needs	DRN	\$0				
75	L00211397	ZACHARY	LAMB	YES	0			LIBA	no falsa	10/29/08	10/24/08			\$0				
76	L00212270	JULIANA	LEARY	YES	12.5			LIBA	3/31/09	11/17/08	10/24/08			\$1,650	\$1,650			
77	L00212280	GABRIELLE	LECH	YES	0			LIBA	3/25/09	11/4/08	10/24/08	needs	DRN	\$0				
78	L00214231	VALERIE	LEIBY	YES	0			LIBA	1/27/09	11/14/08	10/24/08			\$0				
79	L00214130	DAVID	LEONE	YES	0			FSM	no falsa	11/12/08	10/24/08			\$0				
80	L00184073	JARVD	LINKHORST	YES	13			DRF	2/25/09	10/31/08	10/29/08	\$1,550	\$395	\$1,650				
81	L00214154	ALEXIS	LOMBARDO	YES	0			LIBA	no falsa	11/12/08	10/24/08			\$0				
82	L00213168	HALEY	LOMBARDO	YES	0			CSP	2/18/09	10/21/08	3/26/09	spring	start					
83	L00218837	CECILIA	MALDONADO	YES	0			LIBA	4/1/09	3/30/09	3/30/09			\$0				
84	L00218458	SETH	MELLOR	YES	11			EET	3/25/09	3/18/09	3/23/09			\$1,210	w/d			
85	L00213395	JONATHAN	LUCHETTA	YES	15			COM	3/15/09	10/27/08	10/24/08			\$1,650	\$1,650			
86	L00214148	ELIZABETH	MARTIN	YES	15			ARTA	4/3/09	11/12/08	10/23/08	\$2,100		\$1,650				
87	L00214159	KENDRA	MATEYAK	YES	0			FSDA	4/1/09	11/12/08	10/24/08			\$0				
88	L00212495	DANIEL	MENA	YES	14			LIBA	no falsa	11/4/08	10/24/08			\$1,110				

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
	11/18/09		Tamaqua	HS	HS	Classes of	2009											
1	Marian	L	Snyder	Jr.	Jr.	Cur. Cr/sem	Tot.							Total			Acad	
2	ID#	First	Last	Yr.	Yr.	Cr	Cr	Comp.	Comp.	FAFSA	LCCC	Morgan	Pell	State	Morgan	Cum. GPA	Prob?	
3		Name	Name	YES	YES	15.5	15.5			Submt	app.	app.	Grant	Grant	Amt.			
4				YES	YES	0	0			no false	4/3/09	4/1/09	needs	DRN				
131	L00214249	CRAIG	STEVENS	YES	YES	15.5	15.5			3/11/09	11/17/08	10/24/08	\$2,675	\$395	\$1,650			
132	L00212444	HARRISON	STOLL	YES	YES	0	0			3/16/08	10/31/08	10/24/08	needs	DRN	\$0			
133	L00219096	PAUL	STONER	YES	YES	0	0			no false	4/3/09	4/1/09	needs	DRN	\$0			
134	L00219106	NEAL	STRAUSSER	YES	YES	15	15			3/5/09	4/6/09	3/20/09	\$2,675	\$395	\$1,650			
135	L00213387	CHARLES	STROUSE	YES	YES	15	15			3/30/09	10/27/08	10/24/08	\$1,450	\$1,650	\$200			
136	L00184769	KAITLYN	SWEENEY	YES	YES	0	0			1/30/09	11/12/08	10/24/08	needs	DRN	\$0			
137	L00212281	RACHAEL	TERTEL	YES	YES	no attend	no attend			2/5/08	10/29/08	10/24/08	needs	DRN	\$0			
138	L00200128	JOSEPH	TRIANO	YES	YES	0	0			no false	10/27/08	10/24/08	needs	DRN	\$0			
139	L00211396	KAYLA	TROTMAN	YES	YES	0	0			3/30/09	12/1/08	11/1/08			\$0			
140	L00198929	CHRISTI	TRUSKEY	YES	YES	16	16			3/30/09	11/12/08	10/24/08			\$1,650			
141	L0023515	BRETT	VALENTINE	YES	YES	12	12			3/30/09	11/12/08	10/24/08	\$750	\$395	\$505			
142	L00212273	MICHAEL	VALENTINE	YES	YES	15	15			2/6/09	11/12/08	10/24/08			\$1,650			
143	L00214155	ALEX	WAGNER	YES	YES	0	0			GRDA	11/12/08	10/24/08	needs	SS#	\$0			
144	L00213391	KAYLA	WALLACE	YES	YES	12	12			2/24/09	10/27/08	10/24/08			\$1,705			
145	L0023514	BRITTANY	WALTERS	YES	YES	0	0			EDUA	2/13/09	11/6/08	10/24/08	DRN	\$0			
146	L00213706	AMANDA	WATSULA	YES	YES	0	0			EDUA	2/13/09	11/4/08	10/24/08	DRN	\$0			
147	L00214135	CORYNN	WEHR	YES	YES	0	0			LIBA	3/21/09	11/12/08	8/24/08		\$0			
148	L00211976	BRITTNEY	WERNER	YES	YES	12	12			LIBA	2/4/09	9/22/08	9/15/08		\$1,650			
149	L00213515	AMANDA	WHITEHEAD	YES	YES	12.5	12.5			LIBA	4/1/09	10/29/08	10/24/08	\$2,675	\$1,650			
150	L00024139	ROBERT	WHITLEY	YES	YES	15	15			CJAA	2/9/09	11/10/08	10/24/08		\$1,650			
151	L00213577	WAYDE	WILLIAMS	YES	YES	0	0			CISS	2/3/09	10/31/08	10/24/08	DRN	\$0			
152	L00212249	CODY	WISNIEWSKI	YES	YES	no attend	no attend			NSPS	2/19/09	10/31/08	10/24/08		\$0			
153	L00213914	JOSEPH	ZAPRAZNY	YES	YES	0	0			ARTA	no false	11/11/08	10/24/08		\$0			
154	L00223575	JARED	ZEIGLER	YES	YES	12.5	12.5			BUS	8/14/09	8/6/09	8/11/09		\$1,650			
155	granted an appeal for late		FAFSA filing															
156	L00213891	ZACHARY	ZIMMER	YES	YES	0	0			CSP	no false	11/10/08	10/24/08		\$0			
157	L00213892	MEGAN	ZUKUS	YES	YES	12	12			EDUA	3/24/09	11/10/08	10/24/08		\$1,650			
158																		
159	TOTAL												\$74,521	\$5,635	\$113,208	\$56,191		

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	3/09/2009	Tamaqua	HS	Class	of	2007	178	Grads.	110	Applied							
2	Marian	Snyder	Jr.	Cur	Cr/sem	Tot.											
3	First	Last	Sr	Cr	Suc	Cr	Deg.	FAFSA	LCCC	Morgan	Pell	State	Total	Morgan	Cum.	Acad	
4	Name	Name	Yr.	Sp.09	Comp.	Comp.	Prgm.	Submitd	app.	app.	Grant	Grant	Tuit & Fees	Amt.	GPA	no	De
5	Angelina	Acovedo	yes				Undc	02/27/07	03/15/07	03/06/07							
6	Steven	Agosti					Spms	02/27/07	03/15/07	03/06/07							
7	Joseph	Angst	yes	12	12	39.5	Cul	04/06/07	03/20/07	03/15/07	\$1,490	\$438	\$1,605		3		
8	Steven	Balliet	yes	12	12	37	Vet	3/26/08	02/26/07	02/07/07	\$1,141	\$438	\$1,615		3.59		
9	Jared	Beers					Acc	3/22/07	02/23/07	02/23/07							
10	Amanda	Benek	yes		16.5	40.5	Buaa	04/18/07	03/30/07								
11	Aaron	Berger	yes	14	14	42	Elit	3/27/08	03/20/07	03/29/07			\$1,635	\$1,635	3.36		
12	Francois	Bessing	yes		0	15	Dvp	03/26/08	03/08/07	03/07/07					2.2	Y	
13	Frieda	Bessing	yes	12	12.5	35.5	Liba	3/26/08	03/16/07	03/07/07	\$2,366	\$438	\$1,605		2.79		
14	Nicholas	Boyle						02/26/07	10/13/06	12/17/06							
15	Karlissa	Breiner	yes	18	17	47	Grda	3/25/08	10/13/06	01/19/07	\$2,366		\$1,700		2.58		
16	Jessica	Brobst	yes	13	12	33.5	Liba	2/21/08	10/25/06	10/18/06			\$1,605		1.84	Y	
17	Michael	Brode	yes		0	0	Cja	06/13/07	05/24/07	08/20/07					0	Y	
18	Gloria	Cacares					Eoa	12/11/06	11/16/06								
19	Lisa	Chickilly	yes	17	15	46	Undc	3/26/08	11/09/06	3/14/07			\$1,625	\$1,625	3.67		
20	Travis	Comisac	yes		6	20	Liba	3/09/08	03/22/07	01/09/07					1.96	Y	
21	Heather	Coombe	yes		13	24	Liba	3/29/08	01/29/07	01/08/07					2.17		
22	Matthew	Curvey	yes		0	13	Buaa	02/05/07	03/27/07						2.15	Y	
23	Danielle	Daldos	yes	15	15	28.5	Acc	1/27/08	12/11/07	11/13/06	Fall	Term	\$1,605	\$1,605	2.32		
24	Danielle	Daldos	yes	15									\$1,605	\$1,605	2.32		
25	student reimbursement for fall 2008 because student passed 9 credit hours and is not on academic probation at conclusion of fall semester.																
26	Janice	Dolci	yes	12			Edua	4/9/08	10/02/08	12/13/06	\$991	\$438	\$1,625				
27	Jared	Edmonds	yes		3	25	Cja	5/14/07	03/29/07						1.09	Y	
28	Kevin	Faber					Liba	03/29/07	12/13/06								
29	Brady	Forte	yes	15	9	45	Buaa	3/30/08	02/13/07	12/13/06			\$1,605	\$1,605	2.27		
30	Justin	Fox	yes		12	28.5	Dap	03/15/07	3/14/07								
31	William	Garber	yes		3	19.5	Cgd	3/20/08	12/11/06	11/13/07							
32	Andrew	Gerber	yes	12	15	41	Buaa	3/25/08	11/02/06	11/02/06			\$1,605	\$1,605	2.18	Y	
33	Aaron	Gill	yes		15	34	Edua	02/06/07	01/22/07								
34	Ivan	Gomez					Bmg	03/29/07	12/13/06								
35	Michael	Harakel	yes	13	15	40	Edua	3/31/08	04/04/07	3/13/07			\$1,615	\$1,615	2.4		
36	Rachel	Hartranft (Moore)	yes		9	25	Grda	3/11/08	06/20/06	12/13/06					2.32		
37	Ashley	Hazlett					Hrt	01/29/07	12/13/06								
38	Bradley	Hess	yes	14	7	25.5	Liba	3/3/08	02/28/07	2/28/07	\$1,191	\$300			2.32	Y	
39	Dustin	Hill	yes	13	6	15	Buaa	4/16/08	12/6/07	11/15/06			\$1,615		1.6	Y	
40	Megan	Hoppes	yes	12	16	41	Edua	2/22/08	12/11/06	12/05/06			\$1,605	\$1,605	3.17		
41	Jonathan	Houser	yes				Arta	2/13/07	12/13/06								
42	Matthew	Houser	yes	16	18	41	Bmg	3/21/08	04/04/07	03/30/07	\$2,366	\$438			3.22		
43	Joshua	Hunsicker	yes		3	12			7/31/07	12/13/06					1	Y	

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
3/09/2009	Snyder	Tamaqua	HS	Class	of	2007	176	Grads.	110	Applied							
Marlan	Snyder		Jr	Cur.	Cr/sem	Tot											
First	Last	ID#	Sr.	Sp.09	Comp.	Comp.	Pgrm	Submttd	app.	Morgan	Pell	Slate	Total	Morgan	Cum.	no	De
Name	Name		Yr.	Yr.	12.5	33.5	Dap	17/08	12/11/06	11/15/06	Grant	Grant	Tuit & Fees	Ant	GPA	9cr?	obligate
44 Matthew	Jordan	L00186312	yes	13.5	12.5						\$991	\$438	\$1,635	\$207	2.27		
45 Matthew	Jordan	L00186312	yes	12.5							\$991	\$438	\$1,625	\$196			
46 student reimbursement for fall 2008 because student passed 9 credits hours and is not on academic probation at conclusion of fall semester.																	
47 Dayna	Kellett	L00192243					Fsda	03/31/07	03/22/07	03/18/07							
48 Ryan	Knappenberger	L00192253	yes	9	10	38	Edua	2/7/08	03/22/07	01/03/07	\$690		\$1,635	\$915	3.21		
49 Peter	Knapper	L00184776	yes		12	35	Liba		03/29/07	03/20/07							
50 Katrya	Kopunek	L00182519	yes		3	21	Egrs		02/05/07	12/21/06					2.62	Y	
51 Luke	Kowalonek	L00191274	yes		0	9.5	Fsm		03/08/07	12/13/06					1.46	Y	
52 Derek	Krapf	L00035391	yes		0	3	Gtda		12/11/05	11/21/06					0	Y	
53 Lisabeth	Kuklis	L00192552						03/31/07	03/29/07	03/27/07							
54 John	Kulick	L00001856	yes		0	7	Cot		07/25/07	08/01/07					1.29	Y	
55 Taylor	Kunkel	L00190847						03/29/07	02/13/07	12/13/06							
56 Steven	Kurtz	L00191781	yes	15	13	39	Spms	3/15/08	03/08/07	12/13/06			\$1,605	\$1,605	2.64		
57 Melissa	Leibensperger	L00192666	yes		0	16	Psys		04/02/07	03/28/07							
58 Rebecca	Leiby	L00187716	yes	13	13	44.5	Liba	3/11/08	11/09/06	11/09/06			\$1,605	\$1,605	3.6		
59 Maggie	Magrini	L00184763	yes		0	3	Neps		04/02/07	03/29/07					1	Y	
60 Deidre	Mashack	L00192261	yes	15	12	32	Liba	3/31/08	03/22/07	03/14/07	\$2,341	\$438			3.69		
61 Ryan	Matalavage	L00192804	yes	12	15.5	43.5	Liba	3/30/08	04/04/07	03/30/07			\$1,605	\$1,605	2.34		
62 Kory	McGehean	L00192030	yes	14	15	44	Dap	4/30/08	03/15/07	03/13/07			\$1,635	\$1,635	3.43		
63 Catrina	Mehtalic	L00188642	yes		0	1	Liba		12/11/06	11/30/06					2	Y	
64 Tyler	Miller	L00115099	yes	13.5	12	46.5	Gtda	3/30/08	03/29/07	03/16/07	Fail	Term		\$1,665	\$1,665	3	
65 Tyler	Miller	L00115099	yes	15										\$1,645	\$1,645		
66 Student was not included on fall spread sheet																	
67 Tiffany	Moll	L00186017	yes	9	6	32.5	Cul	4/3/08	10/31/06	11/22/06	\$1,774				2.81		
68 Miranda	Mooney	L00186369	yes		0	10	Liba		03/08/07	03/05/07					1.14	Y	
69 Raymond	Morgan	L00190176	yes		3	12	Dup		01/30/07	01/16/07					1.08	Y	
70 Brook	Moyer	L00192025	yes	W/D	15	36	Cja	2/27/08	03/15/07	12/13/06	\$404				3.36		
71 Jonathan	Murphy	L00189004	yes	12	11	38	Com	3/26/08	01/02/07	12/13/06		\$241	\$1,605	\$1,364	3.68		
72 Elmer	Noone	L00188638					Liba		12/11/06	12/14/06							
73 Joseph	O'Malley	L00192212					Liba		03/21/07	03/14/07							
74 Nicole	Pester	L00191273	yes				Buaa	04/06/07	04/23/07	03/31/07							
75 Julia	Peters	L00184770	yes	14	13	51.5	Edua	3/24/08	03/08/07	02/27/07		\$438	\$1,605	\$1,167	3.75		
76 Alexander	Pontaski	L00190613	yes	13	12	40	Liba	3/26/08	2/8/07	4/18/07			\$1,660	\$1,660	2.63		
77 Kasey	Rehatchek	L00191307	yes	12	13	39	Liba	3/8/08	02/23/07	02/20/07			\$1,605	\$1,605	2.59		
78 Holly	Rolland	L00184762	yes	15	9	43	Edua	4/1/08	03/29/07	03/25/07	\$740	\$438	\$1,605	\$427	2.47		
79 Lena	Saoud	L00190424	yes	18	14.5	47.5	Liba	3/17/08	02/05/07	12/20/06	\$1,541	\$438	\$1,605	\$1,635	3.45		
80 Ryan	Schmauch	L00184348	yes	13	12	35.5	Edua	2/42/08	02/05/07	12/21/06			\$1,635	\$1,635	2.14		
81 Jacob	Seibel	L00190850	yes	12	12	30	Com	3/26/08	02/13/07	02/15/06			\$1,605	\$1,605	3.56		
82 Alicia	Shoener	L00192051	yes		0	13	Edua		03/16/07	03/13/07							

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	3/09/2009	Tamaqua	HIS	Class	of	2007	178	Grads.	110	Applied						Acad	
2	Marian	Snyder	Jr.	Cur.	Cr/sem	Tot.										Prob?	
3	First	Last	Sr.	Cr	Suc	Cr.	Deg.	FAFSA	LCCG	Morgan	Pell	State	Total	Morgan	Cum.	no	De
4	Name	ID#	Yr.	Sp.09	Comp.	Comp.	Prgm	Submt	app.	app.	Grant	Grant	Tuit.&Fees	Amt.	GPA	9cr?	obligate
83	Adam	L00192802	yes		0	19	Cja	04/10/07	04/04/07	03/28/07					0.94	Y	
84	Kimberly	L00186249	yes				Liba	04/10/07	11/06/06	10/30/06							
85	Kyle	L00191773	yes	15	15.5	41	Ciss	4/7/08	03/07/07	03/10/07			\$1,605	\$1,605	2.28	Y	
86	Crystal	L00186250	yes		3	19	Edsa	3/31/08	01/17/07	10/03/06					1.54		
87	Jillian	L00192021	yes				Liba	03/28/07	03/15/07	03/05/07							
88	Stephen	L00186200	yes				Com	04/03/07	11/02/06	03/30/07							
89	Daniel	L00192799					Ogd	03/05/07	04/04/07	03/30/07							
90	Diana	L00184775	yes		16.5	40.5	Liba		03/29/07	04/07/07			\$1,605	\$1,605	2.58		
91	Edward	L00186310	yes	12	9	36	Liba	8/15/08	01/19/07	12/13/06			\$1,645	\$1,645	3.77		
92	Tamra	L00191569	yes	14	13	28	Liba	3/31/08	3/2/2007	3/9/07					4	Y	
93	Zachary	L00186016			1	1			10/31/06	8/24/06							
94	Tracey	L00188636	yes	15	12	34	Cja	3/27/08	12/11/06	03/30/07			\$1,605	\$1,605	2.35		
95	Lindsey	L00190426	yes	17	14.5	45.5	Edua	3/21/08	02/05/07	12/13/06			\$1,615	\$1,615	3.78		
96	James	L00182521	yes	18	15	50	Egrs	3/19/08	03/08/07	03/08/07		\$394	\$1,635	\$1,241	3.88		
97	Joshua	L00192899	yes		0	6	Cja		04/09/07	03/29/07					1.26	Y	
98	Total										\$21,383	\$5,753	\$61,620	\$42,757			

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	3/09/2009	Tamaqua	HS	Class of	Cur.	Cr/sem	2008	162	grads	100	applied		Total			Acad	
2	Marian	L Snyder	Jr.	Cur.	Sr.	Cr/sem	Tot.									Prob?	
3	First	Last	Sr.	Cr	Sp 09	Comp	Cr.	FAFSA	LCCC	Morgan	Pell	State	Tuit &	Morgan	Cum.	no	De
4	Name	Name	Yr.	Sp 09	Comp	Comp	9	Submtld	app.	app	Grant	Grant	Fees	Amt.	GPA	9cr?	obligate
5	Amanda	Alonge	L00201674	yes	12	13	24	3/27/08	1/8/08	1/8/08			\$1,605	\$1,605	2.96	0 Y	
6	Lucas	Arndt	L00202182	yes	0	9	HSP	3/27/08	1/8/08	1/8/08							
7	Justin	Ballet	L00198937	yes	13	15	CGD	3/25/08	12/6/07	12/6/07	\$1,140	\$438	\$1,605	\$27	3.41		
8	Matthew	Benek	L00011467	yes	12	12	CMMA	2/19/08	12/20/07	1/8/08			\$1,605	\$1,605	3.75		
9	Austin	Bennage	L00202412	yes			LAWC	1/11/08	1/8/08	1/8/08					2.67		
10	Alicia	Bennett	L00202417	yes	12	12	PREADN	2/19/08	1/14/08	1/8/08	\$2,366	\$438					
11	Carolyn	Bobyak	L00198927	yes	12.5	12	PREADN	3/31/08	11/29/07	12/3/07	\$1,991		\$1,625		1.95		
12	Dezaray	Boerner	L00198444	yes			PREADN	3/31/08	1/11/07	11/2/07	INC						
13	Miranda	Bonetsky	L00198936	yes			ACCC	2/15/08	1/14/08	1/8/08							
14	Justin	Boyer	L00198445	yes			GOT		2/1/08	3/27/08							
15	Justin	Brobst	L00183850	yes	12.5	12	LIBA	3/26/08	2/27/08	1/14/08			\$1,625	\$1,625	2.00		
16	Michael	Brode	L00198915	yes			CJA	2/19/08	4/1/08	12/18/07					0.00		
17	Ashley	Caratini	L00204000	yes		0	EDUA	4/1/08	2/18/08	1/28/08							
18	Ashly	Casler	L00198930	yes	12	13	BUAA	3/30/08	12/20/07	1/8/08			\$1,605	\$1,605	2.81		
19	Aaron	Chromiak		yes			HSP			1/8/08							
20	Steven	Clemson	L00198935	yes			Pre-PTA	2/25/08	1/14/08	1/8/08							
21	Amanda	Conahan	L00199304	yes	16	16	LIBA	2/3/08	10/25/07	1/8/08			\$1,625	\$1,625	3.75		
22	Michael	Conforti	L00201493	yes	13	13	Pre-NURC	2/4/08	12/10/07	1/8/08			\$1,625	\$1,625	3.23		
23	Jule	Cooke		yes			PSYS	1/29/08	1/14/08	1/8/08							
24	Shane	Coombe	L00147026	yes			ACC	2/19/08	1/14/08	1/8/08							
25	Eric	Craigie	L00202433	yes			LIBA		1/14/08	1/8/08							
26	Amanda	Creveling	L00198934	yes			EDS	3/13/08	1/14/08	1/8/08							
27	Kristy	Davis	L00198447	yes	12	12	FSDA	3/31/08	1/9/08	1/8/08	\$2,366	\$438			1.75		
28	Karla	Diekman	L00183851	yes			LIBA		2/15/08	1/21/08							
29	Megan	Ensel	L00198906	yes			PREADN		1/14/08	1/8/08			\$1,605	\$1,605	3.00		
30	Jessica	Estremera	L00202213	yes	12	12	EDUA	2/12/08	1/8/08	1/8/08							
31	Kyle	Evans	L00184771	yes			ACC	2/19/08	1/7/07	11/8/07							
32	Blake	Ferrich	L00079168	yes	15	15	DAP	2/28/08	12/6/07	12/6/07	\$2,366	\$425			2.84		
33	Benjamin	Fink	L00036475	yes	15.5		LIBA	1/23/08	1/14/08	1/8/08	spring	start	\$1,625	\$1,625			
34	Mark	Focht	L00201671	yes	12	12	UNDC	4/2/08	1/11/08	1/8/08	\$2,190		\$1,605		1.81		
35	Triffany	Fogarty	L00198923	yes		7	LIBA	2/11/08	1/11/08	1/8/08					4.00		
36	Mark	Foose	L00198427	yes	w/d	3	METS	3/4/08	11/29/07	12/3/07	\$341				0.50		
37	Corey	Francis	L00198912	yes	12	15	LIBA	1/29/08	2/18/08	12/19/07	\$1,640	\$460			3.25		
38	Jodi	Funk	L00201325	yes	15	15	ECE	3/14/08	12/5/07	12/7/07			\$1,605	\$1,605	2.40		
39	Travis	Garris	L00202426	yes			CJAA		1/14/08	1/8/08							
40	Elena	Gatens	L00203942	yes			BUAA		2/15/08	12/19/07							

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
	First	Last	ID#	Sr.	Cr	Suc	Cr	Deg.	FAFSA	LCCC	Morgan	Pell	State	Tult &	Morgan	Cum.	no	De
	Name	Name		Yr.	Sp.09	Comp.	Comp.	Prgm.	Submt	app.	app.	Grant	Grant	Fees	Amt.	GPA	9cr?	obligate
3	Travis	Pitts	L00203301	yes				HRTS	2/22/08	2/1/08	10/19/07							
4	Nicholas	Pontowski	L00205649	yes	13	9	9	LIBA	3/25/08	4/1/08	2/17/08			\$1,625	\$1,625	2.50		
78	Mykel	Postupack	L00191796	yes	14	16	16	KBD	3/26/08	1/8/08	1/8/08			\$1,620	\$1,620	2.81		
81	Tiffany	Ray	L00202425					BMG	4/1/08	1/14/07	1/8/08							
82	Sheree	Regisford	L00198940	yes				UNDC	1/23/08	1/14/07	1/8/08					0.00	Y	
83	Samantha	Richardson	L00198455	yes		0	3	UNDC	3/20/08	1/14/08	1/8/08	INC						
84	Hannah	Riotto	L00198932	yes				LIBA	1/14/08	1/14/08						4.00		
85	Andrea	Rivadenella	L00200696	yes	12	12	12	Pre-PTA	3/25/08	11/14/07	11/16/07	\$2,240	\$438	\$1,605				
86	Kenny	Rojas	L00200827	yes				LIBA	3/25/08	11/20/07	11/26/07					0.00		
87	Isiah	Roper	L00202408	yes		3	12	BMG	3/31/08	1/11/08	1/8/08							
88	Cody	Sassaman	L00198926	yes				EDUA	1/28/08	2/13/08	1/21/08							
89	Timothy	Schock	L00198921	yes	12	12	18	DAP	3/11/08	2/18/08	1/18/08	\$2,366	\$438	\$1,605		3.83		
90	Jared	Schuettrumpf	L00204233	yes	12	9	9	LIBA	2/19/08	2/25/08	2/15/08	\$2,366	\$438	\$1,605		1.67		
91	Zachary	Skelding	L00203643	yes	12.5	12	12	CSO	4/4/08	2/8/08	2/16/08			\$1,625	\$1,625	3.33		
92	Jason	Steinbrunn	L00184774	yes	12.5	12	18	PSYS	3/21/08	3/6/08	2/28/08			\$1,625	\$1,625	2.83		
93	Erica	Sillers	L00200126	yes	14	15	21	ECI	3/16/08	2/15/08	1/2/08	\$1,341	\$438	\$1,605		3.67		
94	Gabrielle	Smarr	L00204261	yes	13	15	15	LIBA	2/22/08	2/25/08	2/5/08	\$2,340	\$460	\$1,625		4.00		
95	Justin	Smith	L00204428	yes	12	9	12	ELT	3/10/08	2/27/08	2/18/08	\$2,365		\$1,605		2.00		
96	Shari	Snyder	L00201094	yes	13	15	15	CSP	3/2/08	11/29/07	12/3/07	\$1,391	\$438	\$1,605		3.25		
97	Jared	Starr	L00205622	yes		0	12	LIBA	4/1/08	4/1/08	3/31/08					0.00	Y	
98	Mark	Streisel	L00086698	yes				EGRS	2/11/08	1/14/08	1/8/08							
99	Jacquelyn	Taylor	L00199199	yes	9	9	12	HUS	3/12/08	10/8/07	2/20/08	\$1,774	\$219	\$963		2.00		
100	Amy	Terry	L00201847	yes				BMG	12/20/07	2/20/08	2/20/08					0.00	Y	
101	Allison	Tonkin	L00203646	yes	12	6	15	LIBA	2/2/08	2/8/08	1/7/08			\$1,605				
102	Lauren	Tracy	L00191795	yes	12	9	12	EDUA	2/7/08	11/16/07	11/15/07	\$1,890	\$460	\$1,605		1.67		
103	Gatona	Troutman	L00202194	yes	13	3.5	6.5	PREADN	3/25/08	1/8/08	1/8/08	\$1,090	\$460	\$1,625		1.08	Y	
104	Ronnie	Valentine	L00202407	yes		12	12	ACC	3/27/08	1/11/08	1/8/08					2.75		
105	Casey	Wagner	L00198938	yes				ECE	2/15/08	1/11/08	1/8/08							
106	Harold	Wagner	L00202418	yes				GISS	3/8/08	1/14/08	1/8/08							
107	Danielle	Walton	L00198920	yes	12	12	20	EDUA	3/23/08	1/9/08	1/8/08			\$1,605	\$1,605	3.80		
108	Kevin	Warmkessel	L00205695	yes				LIBA	3/30/08	4/3/08	3/30/08							
109	Eric	Weeks	L00198939	yes	16	12	16	EDUA	2/16/08	1/16/08	1/8/08	\$2,366	\$438			1.64		
110	Lauren	Wenzel	L00183318	yes				BAAA	2/15/08	1/11/08	1/8/08							
111	Nathan	Zeigler	L00198928	yes	13	12	23	LIBA	3/26/08	2/18/08	12/19/07	\$1,040	\$438	\$1,625	\$147	3.30		
112	Alex	Zubey	L00198460	yes				BMG		1/14/08	1/8/08							
113	Total											\$55,314	\$10,357	\$70,034	\$35,608			

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	8/27/09		Tamaqua	HS	Class of	2008	162 grads			100	applied							
2	Marian	L. Snyder		Jr.	Cur. Cr/sem:	Tot.								Total			Acad	
3	First	Last	ID#	Sr.	Cr	Suc	Cr.	Deg	FAFSA	app	Morgan	Pell	State	Tuit & Fees	Morgan Amt.	Cum. GPA	no 9cr?	De obligate
4	Name			Yr.	Su 09	Comp.	Comp.	Prgm.	Submt	app	app	Grant	Grant					
5	Amanda	Alonge	L00201674	yes		12	36	HSP	3/27/08	1/14/08	1/8/08						0 Y	
6	Lucas	Arndt	L00202182	yes		0	9	LIBA	3/31/08	1/8/08	1/8/08							
7	Justin	Balliet	L00198937	yes	3	16	48	CGD	3/25/08	12/6/07	12/6/07			\$715.50	\$715.50	3.54		
8	Matthew	Benek	L00011467	yes		12	24	CMMA	2/19/08	12/20/07	1/8/08					3.4		
9	Austin	Bennage	L00202412	yes				LAWC	1/11/08	1/11/08	1/8/08							
10	Alicia	Bennett	L00202417	yes		12	24	PREADN	2/19/08	1/14/08	1/8/08					2.9		
11	Carolyn	Bobyak	L00198927	yes		3	26	PREADN	3/31/08	11/29/07	12/3/07					1.4		
12	Dezray	Boerner	L00198444	yes				PREADN	3/31/08	11/1/07	11/2/07	INC						
13	Miranda	Bonetsky	L00198936	yes				ACCC	2/15/08	1/14/08	1/8/08							
14	Justin	Boyer	L00198445	yes				COT	2/1/08	3/27/08								
15	Justin	Brobst	L00183850	yes		6.5	18.5	LIBA	3/25/08	2/27/08	1/14/08					1.28 Y		
16	Michael	Brode	L00198915	yes				CJA	2/19/08	4/1/08	12/18/07							
17	Ashley	Caratini	L00204000	yes		0	0	EDUA	4/1/08	2/18/08	1/28/08					0.00		
18	Ashly	Casler	L00198930	yes		12	33	BUAA	3/30/08	12/20/07	1/8/08					2.97		
19	Aaron	Chromiak		yes				HSP			1/8/08							
20	Steven	Clemson	L00198935	yes				Pre-PTA	2/25/08	1/14/08	1/8/08							
21	Amanda	Conahan	L00199304	yes		16	32	LIBA	2/3/08	10/25/07	1/8/08					3.66		
22	Michael	Conforti	L00201493	yes		13	26	Pre-NURC	2/4/08	12/10/07	1/8/08					3.19		
23	Jule	Cooke		yes				PSYS	1/29/08	1/14/08	1/8/08							
24	Shane	Coombe	L00147026	yes				ACC	2/19/08	1/14/08	1/8/08							
25	Eric	Craigle	L00202433	yes				LIBA		1/14/08	1/8/08							
26	Amanda	Creveling	L00198934	yes				EDS	3/13/08	1/14/08	1/8/08							
27	Kristy	Davis	L00198447	yes	3	12	24	FSDA	3/31/08	1/9/08	1/8/08			\$321	\$321	2.50		
28	Karla	Diekman	L00183851	yes				LIBA		2/15/08	1/21/08							
29	Megan	Ensel	L00198906	yes				PREADN		1/14/08	1/8/08							
30	Jessica	Estremera	L00202213	yes		12	24	EDUA	2/12/08	1/8/08	1/8/08					3.25		
31	Kyle	Evans	L00184771	yes				ACC	2/19/08	1/7/07	1/8/07							
32	Blake	Ferrich	L00079168	yes		15	47	DAP	2/28/08	12/6/07	12/6/07					2.96		
33	Benjamin	Fink	L00036475	yes	3	15.5	29.5	LIBA	1/23/08	1/14/08	1/8/08			\$321	\$321	2.81		
34	Mark	Focht	L00201671	yes		0	14	JMLC	4/2/08	1/11/08	1/8/08					1.32		
35	Tiffany	Fogarty	L00198923	yes			14	LIBA	2/1/08	1/11/08	1/8/08					4.00		
36	Mark	Foose	L00198427	yes			6	METS	3/4/08	11/29/07	12/3/07					0.50		
37	Corey	Francis	L00198912	yes		12	27	LIBA	1/29/08	2/18/08	12/19/07					3.25		
38	Jodi	Funk	L00201325	yes		15	30	ECE	3/14/08	12/5/07	12/7/07					2.60		
39	Travis	Garris	L00202426	yes				CJAA		1/14/08	1/8/08							
40	Elena	Gatens	L00203942	yes				BUAA		2/15/08	12/19/07							

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
	First Name	Last Name	ID#	Sr. Yr.	Sr. Yr.	Suc Comp.	Cr. Comp.	Deg. Prgm.	FAFSA Submt	LCCC app.	Morgan app.	Pell Grant	State Grant	Tult & Fees	Morgan Amt	Cum. GPA	no 9cr?	De obligate
3	Travis	Pitts	L00203301	yes				HRTS	2/22/08	2/1/08	10/19/07							
4	Nicholas	Pontoski	L00205649	yes	3	16	25	LIBA	3/25/08	4/1/08	2/17/08			\$321	\$321	2.47		
79	Mykel	Postupack	L00191786	yes		12	28	KBD	3/26/08	1/8/08	1/8/08					2.79		
80	Tiffany	Ray	L00202425					BMG	4/1/08	1/14/08	1/8/08							
81	Sheree	Regisford	L00198940	yes				UNDC	1/23/08	1/14/07	1/8/08							
82	Samantha	Richardson	L00198455	yes		0	3	UNDC	3/20/08	1/14/08	1/8/08	INC				0.00	Y	
83	Hannah	Riotto	L00198932	yes				LIBA	1/14/08	1/14/08								
84	Andrea	Rivadeneira	L00200696	yes		12	21	Pre-PTA	3/25/08	11/14/07	11/16/07					3.86		
85	Kenny	Rojas	L00200827	yes				LIBA	3/25/08	11/20/07	11/26/07					0.00		
86	Isiah	Roper	L00202408	yes		3	12	BMG	3/31/08	1/11/08	1/21/08							
87	Cody	Sassaman	L00198926	yes				EDUA	1/28/08	2/13/08	1/21/08					3.80		
88	Timothy	Schock	L00198921	yes		12	30	DAP	3/11/08	2/18/08	1/18/08					2.33		
89	Jared	Schuetrum	L00204233	yes		12	21	LIBA	2/19/08	2/25/08	2/15/08			\$321	\$321	3.16		
90	Zachary	Skelding	L00203643	yes	3	12.5	24.5	CSO	4/4/08	2/8/08	2/16/08					2.89		
91	Jason	Steinbrunn	L00184774	yes		12.5	30.5	PSYS	3/21/08	3/6/08	2/28/08					3.47		
92	Erica	Sillers	L00200126	yes		14	35	ECI	3/16/08	2/15/08	1/2/08					4.00		
93	Gabrielle	Smarr	L00204261	yes		13	28	LIBA	2/22/08	2/25/08	2/5/08					1.00		
94	Justin	Smith	L00204428	yes		0	9	ELT	3/10/08	2/27/08	2/18/08							
95	Sheri	Snyder	L00201094	yes	9	16	31	CSP	3/20/08	11/29/07	12/3/07			\$963	\$963	3.04		
96	Jared	Starr	L00205622	yes		0	12	LIBA	4/1/08	4/1/08	3/31/08					0.00	Y	
97	Mark	Streisel	L00086698	yes				EGRS	2/11/08	1/14/08	1/8/08							
98	Jacquelyn	Taylor	L00199199	yes		6	15	HUS	3/12/08	10/8/07	2/20/08					2.80	Y	
99	Amy	Terry	L00201847	yes				BMG	12/20/07	12/20/07	2/20/08							
100	Allison	Tonkin	L00203646	yes		3	9	LIBA	2/2/08	2/8/08	1/7/08					0.25	Y	
101	Lauren	Tracy	L00191795	yes		0	12	EDUA	2/7/08	11/16/07	11/15/07					1.67		
102	Gatona	Troutman	L00202194	yes		6	9.5	PREADN	3/25/08	1/8/08	1/8/08					1.19	Y	
103	Ronnie	Valentine	L00202407	yes			12	ACC	3/27/08	1/11/08	1/8/08					2.20		
104	Casey	Wagner	L00198938	yes				ECE	2/15/08	1/11/08	1/8/08							
105	Harold	Wagner	L00202418	yes				CISS	3/6/08	1/14/08	1/8/08							
106	Danielle	Walton	L00198920	yes	3	15	35	EDUA	3/23/08	1/9/08	1/8/08			\$321	\$321	3.54		
107	Kevin	Warmkessel	L00205695	yes				LIBA	3/30/08	4/3/08	3/30/08							
108	Eric	Weeks	L00198939	yes		13	29	EDUA	2/16/08	1/16/08	1/8/08					1.87		
109	Lauren	Wenzel	L00183318	yes				BUAA	2/15/08	1/11/08	1/8/08							
110	Nathan	Zelger	L00198928	yes		13	36	LIBA	3/26/08	2/18/08	12/19/07					3.15		
111	Alex	Zubey	L00198460	yes				BMG		1/14/08	1/8/08							
112	Total											\$1,183	\$0	\$6,880	\$6,016			

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	8/27/09	Tamara	HS	Class	of	2007	178	Grads.	110	Applied							
2	Manan	Snyder	Jr	Cur.	Su.09	Tot	Deg	FAFSA	LCCC	Morgan	Pell	State	Total	Morgan	Cum	Acad	
3	First	Last	ID#	Cr	Comp.	Cr	Prgm.	Submt	app.	app.	Grant	Grant	Tuit & Fees	Amt.	GPA	no	De
4	Name	Name	Yr	Su.09	Comp.	Comp.	Undc	02/27/07	02/13/07	03/08/07	needs	taxes	verf form				obligate
5	Angelina	Acavedo	L00190848	yes			Undc	02/27/07	03/15/07	03/06/07							
6	Steven	Agosti	L00026608				Cul	04/06/07	03/20/07	03/15/07							
7	Joseph	Angst	L00184772	yes			Vet	3/26/08	02/26/07	02/07/07							
8	Steven	Balliet	L00191384	yes	7	12	Acc	3/22/07	02/23/07	02/23/07							
9	Jared	Beers	L00191316				Buaa	04/18/07	03/30/07								
10	Amanda	Benek	L00186309	yes			Undc	03/27/08	03/20/07	03/29/07							
11	Aaron	Berger	L00192174	yes			Eli	03/08/07	03/07/07								
12	Francois	Bessing	L00191811	yes			Dvp	03/16/07	03/07/07								
13	Frieda	Bessing	L00192044	yes			Liba	02/26/07	10/13/06	12/17/06							
14	Nicholas	Boyle	L00184779				Grda	3/25/08	10/13/06	01/19/07							
15	Karissa	Breiner	L00186019	yes	17	47	Liba	2/21/08	10/25/06	10/18/06							
16	Jessica	Brobst	L00185716	yes	12	33.5	Cja	06/13/07	05/24/07	08/20/07							
17	Michael	Brodie	L00194689	yes	0	0	Ece	12/11/06	11/16/06								
18	Gloria	Caceres	L00188641				Undc	3/26/08	11/09/06	3/14/07							
19	Lisa	Chickilly	L00187715	yes			Liba	3/09/08	03/22/07	01/09/07							
20	Travis	Comisac	L00192241	yes	6	20	Liba	3/29/08	01/29/07	01/08/07							
21	Heather	Coombe	L00190154	yes	0	13	Buaa	02/05/07	03/27/07								
22	Matthew	Curvey	L00190425	yes			Acc	1/27/08	12/11/07	11/13/06							
23	Danielle	Daldos	L00188640	yes			Eduu	4/9/08	10/02/06	12/13/06	\$496	\$150	\$642				
24	Janice	Dolci	L00183858	yes	6	12.5	Cja	5/14/07	03/29/07								
25	Jared	Edmonds	L00194286	yes	3	25	Liba	03/29/07	12/13/06								
26	Kevin	Faber	L00192551				Buaa	02/13/07	12/13/06								
27	Brady	Forte	L00190261	yes			Dap	03/15/07	3/14/07								
28	Justin	Fox	L00188828	yes			Cgd	3/20/08	12/11/06	11/13/07							
29	William	Garber	L00188639	yes	3	19.5	Buaa	3/25/08	11/02/06	11/02/06							
30	Andrew	Gerber	L00184341	yes			Eduu	02/08/07	01/22/07								
31	Aaron	Gill	L00190624	yes			Bmg	03/29/07	12/13/06								
32	Ivan	Gomez	L00192549				Eduu	3/31/08	04/04/07	3/13/07							
33	Michael	Harakel	L00192778	yes			Grda	3/11/08	06/20/06	12/13/06							
34	Rachel	Hartramf (Moore)	L00013062	yes			Hrt	01/29/07	12/13/06								
35	Ashley	Hazlett	L00190160				Liba	3/3/08	02/28/07	2/28/07							
36	Bradley	Hess	L00191472	yes	7	25.5	Buaa	4/16/08	12/6/07	11/15/06							
37	Dustin	Hill	L00182544	yes	10	19	Buaa	12/11/06	11/15/06								
38	reimbursement for spring 2009 because student is now back in good standing and passed 10 credits spring 2009																
39	Megan	Hoppes	L00186643	yes	9	21	Eduu	2/22/08	12/11/06	12/05/06							
40	Jonathan	Houser	L00190845	yes			Arta	2/13/07	12/13/06								
41	Matthew	Houser	L00192800	yes			Bmg	3/21/08	04/04/07	03/30/07							
42	Joshua	Hunsicker	L00196892	yes	3	12		7/31/07	12/13/06								
43	Matthew	Jordan	L00186312	yes			Dap	1/7/08	12/11/06	11/15/06							

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
	1	8/27/09	Tamaqua	HS	Class	of	2007	178	Grads	110	Applied							
	2	Marian Snyder		Jr	Cur	Cr/sem	Tot										Acad	
	3	First	ID#	Sr	Cr	Suc	Comp	Cr	Deg	FAFSA	Morgan	Pell	State	Total	Morgan	Cum	Prob?	
	4	Name		Yr	Su	09	Comp		Pgm	Submid	app	Grant	Grant	Tuit & Fees	Amt	GPA	9cr?	obligate
44	Dayna	Kellert	L00192243						Fsda	03/31/07	03/22/07	03/18/07						
45	Ryan	Knappenberger	L00192253	yes					Edua	2/7/08	03/22/07	01/03/07						
46	Peter	Knapper	L00184776	yes					Liba		03/29/07	03/20/07						
47	Katya	Kopunek	L00182519	yes		3	21	Egrs		02/05/07	12/21/06					2.62	Y	
48	Luke	Kowalunek	L00191274	yes		0	9.5	Fsm		03/08/07	12/13/06					1.46	Y	
49	Derek	Krapf	L00035391	yes		0	3	Gda		12/11/06	11/21/06					0	Y	
50	Lisabeth	Kuklis	L00192552						03/31/07	03/29/07	03/27/07					1.29	Y	
51	John	Kulick	L00001856	yes		0	7	Cot		07/25/07	08/01/07							
52	Taylor	Kunkel	L00190847						03/29/07	02/13/07	12/13/06							
53	Steven	Kurtz	L00191781	yes				Spms	3/15/08	03/08/07	12/13/06							
54	Melissa	Lebensperger	L00192666	yes				Psys		04/02/07	03/28/07							
55	Rebecca	Leiby	L00187716	yes				Liba	3/11/08	11/09/06	11/09/06							
56	Maggie	Magrini	L00184763	yes		0	3	Nsps		04/02/07	03/29/07					1	Y	
57	Deidre	Mashack	L00192261	yes	6	21	53	Liba	3/31/08	03/22/07	03/14/07				\$642	3.64		
58	Ryan	Matalavage	L00192804	yes				Liba	3/30/08	04/04/07	03/30/07							
59	Kory	McGehean	L00192030	yes				Dap	4/30/08	03/15/07	03/13/07					2	Y	
60	Catrina	Mehalic	L00188642	yes		0	1	Liba		12/11/06	11/30/06							
61	Tyler	Miller	L00115099	yes		12	46.5	Gda	3/30/08	03/29/07	03/16/07							
62	Tiffany	Moll	L00186017	yes		6	32.5	Cul	4/3/08	03/08/07	03/06/07					1.14	Y	
63	Miranda	Mooney	L00186389	yes		0	10	Liba		01/30/07	01/16/07					1.08	Y	
64	Raymond	Morgan	L00190176	yes		3	12	Dup		03/08/07	12/13/06	\$1,774				3.38		
65	Brook	Moyer	L00192025	yes	9	6	42	Cja	2/27/08	03/15/07	12/13/06				\$963			
66	Jonathan	Murphy	L00189004	yes				Com	3/26/08	01/02/07	12/13/06							
67	Elmer	Noone	L00188638					Liba		12/11/06	12/14/06							
68	Joseph	O'Malley	L00192212					Liba		03/21/07	03/14/07							
69	Nicola	Pester	L00191273	yes				Buaa	04/05/07	04/23/07	03/31/07							
70	Julia	Peters	L00184770	yes				Edua	3/24/08	03/08/07	02/27/07							
71	Alexander	Pontaski	L00190613	yes				Liba	3/26/08	2/8/07	4/18/07							
72	Kasey	Rehatchek	L00191307	yes				Liba	3/8/08	02/23/07	02/20/07							
73	Holly	Rolland	L00184762	yes				Edua	4/1/08	03/29/07	03/25/07							
74	Lena	Saoud	L00190424	yes				Liba	3/17/08	02/05/07	12/20/06							
75	Ryan	Schmauch	L00184348	yes				Edua	2/42/08	02/05/07	12/21/06							
76	Jacob	Seibel	L00190850	yes	3	15	45	Com	3/26/08	02/13/07	02/15/06				\$366.50	3.71		
77	Alicia	Shoener	L00192051	yes				Edua		03/16/07	03/13/07							
78	Adam	Sinton	L00192802	yes		0	19	Cja		04/04/07	03/28/07					0.94	Y	
79	Kimberly	Skodacek	L00186249	yes				Liba	04/10/07	11/06/06	10/30/06							
80	Kyle	Smith	L00191773	yes				Ciss	4/7/08	03/07/07	03/10/07							
81	Crystal	Steele	L00186250	yes		3	19	Edsa	3/31/08	01/17/07	10/03/06					1.54	Y	
82	Jillian	Streble	L00192021	yes				Liba	03/28/07	03/15/07	03/05/07							

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
	18/27/09		Tamaqua	HS	Class	of	2007	178	Grads.	110	Applied						Acad	
1	Marian	Snyder		Jr	Cur	Cri/sem	Tot	Deg.	FAFSA	LCCC	Morgan	Pell	State	Total	Morgan	Cum	Prob?	
2	First	Last	ID#	Sr.	Cr	Suc	Cr	Cgd	Submtd	app	app	Grant	Grant	Tuit.&Fees	Amt.	GPA	no	De
3	Name	Name		Yr	Su.09	Comp.	Comp.	Prgm									9cr?	obligate
4																		
83	Stephen	Surotchal	L00186200	yes				Com	04/03/07	11/02/06	03/30/07							
84	Daniel	Thomas	L00192799						03/05/07	04/04/07	03/30/07							
85	Diana	Thomas	L00184775	yes				Liba	03/29/07	04/07/07								
86	Edward	Valentine	L00186310	yes	4	9		Liba	8/15/08	01/19/07	12/13/06			\$321	\$321	2.56		
87	Tamra	Veronsky	L00191569	yes	4	14	42	Liba	3/31/08	3/2/2007	3/9/07			\$448	\$448	3.37		
88	Zachary	Wentz	L00186016			1	1			10/31/06	8/24/06					4	Y	
89	Tracey	Williams	L00188636	yes				Cja	3/27/08	12/11/06	03/30/07							
90	Lindsey	Yorke	L00190426	yes	6	17	62.5	Edua	3/21/08	02/05/07	12/13/06			\$652	\$652	3.54		
91	James	Ziegler	L00182521	yes				Egrs	3/19/08	03/09/07	03/08/07							
92	Joshua	Zukus	L00192899	yes		0	6	Cja		04/09/07	03/29/07					1.26	Y	
93																		
94	Total											\$2,270	\$150	\$5,822	\$5,832			

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JOHN E MORGAN FDN-MAIN

Trade date basis

ACCOUNT HOLDINGS

Cash and short term

	Shares/units	Average tax cost per share/unit	Tax cost	Market value per share/unit	Market value	Percent of asset class	Unrealized gain/loss	Estimated annual income	Current yield
BESSEMER SWEEP PROGRAM 0 150 %	229,553 520	\$1 00	\$229,553	\$1 000	\$229,553	11 1 %		\$344	0 15 %
FED HM LN MTG CP (8G5723) 0 280 % Due 02/08/2010 Aaa /AAA	1,850,000	99 87	1,847,551	BOOK	1,847,611	89 0	60	5,154	0 28
Total cash and short term			\$2,077,104		\$2,077,164	100.0 %	\$60	\$5,498	

Fixed income

US government

FEDERAL HOME LOAN BANK 4 250 % Due 06/11/2010	85,000	\$97 33	\$82,728	\$101 781	\$86,513	0 6 %	\$3,785	\$3,612	4 18 %
FEDERAL HOME LOAN BANK 5 125 % Due 09/29/2010	250,000	100 35	250,865	103 250	258,125	1 7	7,260	12,812	4 96
FEDERAL HOME LOAN BANK 5 250 % Due 06/10/2011	3,360,000	99 41	3,340,310	105 906	3,558,441	23 3	218,131	176,400	4 96
FEDERAL HOME LOAN BANK 5 000 % Due 09/09/2011	450,000	99 63	448,348	105 969	476,860	3 1	28,512	22,500	4 72
FEDERAL HOME LOAN BANK 4 750 % Due 12/09/2011	500,000	98 60	493,002	106 563	532,815	3 5	39,813	23,750	4 46
FEDERAL HOME LOAN BANK 4 875 % Due 12/14/2012	95,000	101 89	96,795	108 406	102,985	0 7	6,190	4,631	4 50
FEDERAL HOME LOAN BANK 5 375 % Due 06/13/2014	500,000	112 28	561,405	111 031	555,155	3 6	(6,250)	26,875	4 84
FEDERAL HOME LOAN BANK 3 400 % Due 06/17/2014	700,000	100 38	702,688	103 344	723,408	4 7	20,720	23,800	3 29

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JOHN E MORGAN FDN-MAIN

Trade date basis

	Shares/units	Average tax cost per share/unit	Tax cost	Market value per share/unit	Market value	Percent of asset class	Unrealized gain/loss	Estimated annual income	Current yield
US TREASURY NOTES 4 625 % Due 11/15/2016	3,440,000	102 13	3,513,100	108 195	3,721,908	24 3	208,808	159,100	4 27
Total US government			\$9,489,241 ✓		\$10,016,210	65.5%	\$526,969	\$453,480	4.53%
Corporate									
BANK OF AMERICA CORP TLGP 1 700 % Due 12/23/2010 Aaa /AAA	500,000	\$100 00	\$500,000		\$504,525	3 3%	\$4,525	\$8,500	1 68%
AMGEN INC 0 125 % Due 02/01/2011 A3 /A+	450,000	93 75	421,875	98 750	444,375	2 9	22,500	562	0 13
MEDTRONIC INC NOTE 1 500 % Due 04/15/2011 A1 /AA-	450,000	95 00	427,500	101 500	456,750	3 0	29,250	6,750	1 48
GENERAL ELEC CAP CORP 5 250 % Due 10/19/2012 Aa2 /AA+	325,000	104 58	339,881	106 422	345,871	2 3	5,990	17,062	4 93
WAL-MART STORES INC 4 250 % Due 04/15/2013 Aa2 /AA	250,000	99 76	249,397	106 027	265,067	1 7	15,670	10,625	4 01
IBM CORP 2 100 % Due 05/06/2013 A1 /A+	450,000	99 92	449,635	99 800	449,100	2 9	(535)	9,450	2 10
AMER EXPRESS CREDIT CO 7 300 % Due 08/20/2013 A2 /BBB+	295,000	99 83	294,513	112 388	331,544	2 2	37,031	21,535	6 50
NOVARTIS CAPITAL CORP 4 125 % Due 02/10/2014 Aa2 /AA-	320,000	99 90	319,670	105 118	336,377	2 2	16,707	13,200	3 92
JPMORGAN CHASE & CO 3 700 % Due 01/20/2015 Aa3 /A+	400,000	99 79	399,152	100 296	401,184	2 6	2,032	14,800	3 69
PROCTER & GAMBLE CO 3 500 % Due 02/15/2015 Aa3 /AA-	350,000	99 58	348,530	102 301	358,053	2 3	9,523	12,250	3 42
PFIZER INC 5 350 % Due 03/15/2015 A1 /AA	450,000	99 87	449,437	109 290	491,805	3 2	42,368	24,075	4 90
TRANSOCEAN INC CONV SER B 1 500 % Due 12/15/2037 Baa2 /BBB+	450,000	90 31	406,406	96 500	434,250	2 8	27,844	6,750	1 55
Total corporate			\$4,605,996		\$4,818,901	31.5%	\$212,905	\$145,559	3.02%

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JOHN E MORGAN FDN-MAIN

Trade date basis

	Market value per share/unit	Market value	Percent of asset class	Unrealized gain/loss	Estimated annual income	Current yield
International						
SHELL INTERNATIONAL FIN 4.000 % Due 03/21/2014 Aa1 /AA	\$104.353	\$469,588	3.1%	\$19,710	\$18,000	3.83%
Total fixed income		\$15,304,699	100.0%	\$759,584	\$617,039	4.03%

U.S. Large cap

Consumer discretionary

DISNEY (WALT) HOLDING CO (DIS)	11,100	\$20.47	\$227,225		\$3,885	1.09%
KOHL'S CORP (KSS)	7,000	44.05	308,364	69,146		
LOWES COS INC (LOW)	18,500	21.28	393,665	39,050	6,660	1.54
STAPLES INC (SPLS)	19,500	24.09	469,675	9,830	6,435	1.34
Total consumer discretionary			\$1,398,929	\$248,776	\$16,980	1.03%

Consumer staples

PROCTER & GAMBLE CO (PG)	9,750	\$66.83	\$651,616	(\$60,474)	\$17,160	2.90%
WAL-MART STORES INC (WMT)	9,000	45.71	411,395	69,655	9,810	2.04
Total consumer staples			\$1,063,011	\$9,181	\$26,970	2.52%

Energy

APACHE CORP (APA)	4,250	\$104.38	\$443,608	(\$5,136)	\$2,550	0.58%
EOG RES INC (EOG)	5,500	99.73	548,517	(13,367)	3,190	0.60
HESS CORP (HES)	7,500	58.04	435,302	18,448	3,000	0.66

Trade date basis

	Shares/units	Average tax cost per share/unit	Tax cost	Market value per share/unit	Market value	Percent of asset class	Unrealized gain/loss	Estimated annual income	Current yield
WEATHERFORD INTL LTD	20,400	12 07	246,271	17 910	365,364	2 6	119,093	\$8,740	0.49%
Total energy			\$1,673,698		\$1,792,736	12.5%	\$119,038		
Financials									
AMERICAN EXPRESS (AXP)	13,050	\$35 37	\$461,614	\$40 520	\$528,786	3 7%	\$67,172	\$9,396	1 78%
JPMORGAN CHASE & CO (JPM)	11,500	42 84	492,606	41 670	479,205	3 4	(13,401)	2,300	0 48
MORGAN STANLEY GRP INC (MS)	16,500	30 28	499,560	29 600	488,400	3 4	(11,160)	3,300	0 68
T ROWE PRICE GROUP INC (TROW)	7,750	53 60	415,364	53 250	412,687	2 9	(2,677)	7,750	1 88
Total financials			\$1,869,144		\$1,909,078	13.3%	\$39,934	\$22,746	1.19%
Health care									
CELGENE CORP (CELG)	8,898	\$22 45	\$199,796	\$55 680	\$495,440	3 5%	\$295,644		
JOHNSON & JOHNSON (JNJ)	4,500	51 59	232,146	64 410	289,845	2 0	57,699	8,820	3 04
PFIZER INC (PFE)	22,500	18 61	418,725	18 190	409,275	2 9	(9,450)	16,200	3 96
TEVA PHARM INDS LTD ADR	5,750	47 65	273,992	56 180	323,035	2 3	49,043	2,771	0 86
THERMO FISHER SCIENTIFIC (TMO)	6,250	27 81	173,785	47 690	298,062	2 1	124,277		
Total health care			\$1,298,444		\$1,815,657	12.7%	\$517,213	\$27,791	1.53%
Industrials									
FEDEX CORP (FDX)	3,750	\$81 15	\$304,330	\$83 450	\$312,937	2 2%	\$8,607	\$1,650	0 53%
ILLINOIS TOOL WORKS INC (ITW)	9,750	48 06	468,567	47 990	467,902	3 3	(665)	12,090	2 58
INGERSOLL-RAND PUBLIC LTD	12,250	35 90	439,781	35 740	437,815	3 1	(1,966)	3,430	0 78
TYCO INTL LTD NEW	12,500	35 24	440,520	35 680	446,000	3 1	5,480	10,000	2 24
UNION PACIFIC CORP (UNP)	4,750	65 56	311,392	63 900	303,525	2 1	(7,867)	5,130	1 69
UNITED PARCEL SERVICE CL B (UPS)	4,500	56 76	255,405	57 370	258,165	1 8	2,760	8,100	3 14
Total industrials			\$2,219,995		\$2,226,344	15.6%	\$6,349	\$40,400	1.81%

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JOHN E MORGAN FDN-MAIN

Trade date basis

Information technology	Shares/units	Average tax cost per share/unit	Tax cost	Market value per share/unit	Market value	Percent of asset class	Unrealized gain/loss	Estimated annual income	Current yield
CISCO SYSTEMS INC (CSCO)	26,000	\$15.75	\$409,601	\$23.940	\$622,440	4.4%	\$212,839		
CORNING INC (GLW)	19,500	22.61	440,827	19.310	376,545	2.6	(64,282)	3,900	1.04
EMC CORP (EMC)	25,000	12.15	303,674	17.470	436,750	3.1	133,076		
GOOGLE INC (GOOG)	750	621.63	466,223	619.980	464,985	3.3	(1,238)		
MICROSOFT CORP (MSFT)	15,500	30.71	476,061	30.480	472,440	3.3	(3,621)	8,060	1.71
PAYCHEX INC (PAYX)	13,750	30.13	414,333	30.640	421,300	2.9	6,967	17,050	4.05
Total information technology			\$2,510,719		\$2,794,460	19.5%	\$283,741	\$29,010	1.04%
Materials									
DOW CHEMICAL (DOW)	16,000	\$26.66	\$426,555	\$27.630	\$442,080	3.1%	\$15,525	\$9,600	2.17%
INTERNATIONAL PAPER (IP)	23,000	26.33	605,513	26.780	615,940	4.3	10,427	2,300	0.37
Total materials			\$1,032,068		\$1,058,020	7.4%	\$25,952	\$11,900	1.12%
Total u.s. large cap			\$13,066,008		\$14,316,192	100.0%	\$1,250,184	\$184,537	1.29%

Non-U.S. Large cap

Non-U.S. large cap funds

OLD WESTBURY NON-US LC FD BOOK COST 6,493,704	771,052.646	\$8.42	\$6,493,704	\$9.300	\$7,170,789	100.0%	\$677,085	\$101,007	1.41%
Total non-u.s. large cap			\$6,493,704		\$7,170,789	100.0%	\$677,085	\$101,007	1.41%

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- JOHN E MORGAN FDN-MAIN

Trade date basis

		Average tax cost per share/unit	Shares/units	Tax cost	Market value per share/unit	Market value	Percent of asset class	Unrealized gain/loss	Estimated annual income	Current yield
Global Small & Mid cap										
Global small & mid cap funds										
OLD WEST GL SM & MD CAP FD		\$10.42	661,974,092	\$6,898,086	\$12.770	\$8,453,409	100.0%	\$1,555,323	\$68,845	0.81%
BOOK COST	6,898,086									
Total global small & mid cap				\$6,898,086		\$8,453,409	100.0%	\$1,555,323	\$68,845	0.81%

Global Opportunities

Global opportunities funds										
OLD WESTBURY GL OPTIES FD		\$6.85	1,183,728,460	\$8,112,845	\$7.070	\$8,368,960	100.0%	\$256,115	\$198,866	2.38%
BOOK COST	8,112,845									
Total global opportunities				\$8,112,845		\$8,368,960	100.0%	\$256,115	\$198,866	2.38%

Real Return / Commodities

Real return funds										
OLD WESTBURY REAL RETRN FD		\$12.17	346,112,134	\$4,211,196	\$9.860	\$3,412,665	100.0%	(\$798,531)	\$30,111	0.88%
BOOK COST	4,225,629									
Total real return / commodities				\$4,211,196		\$3,412,665	100.0%	(\$798,531)	\$30,111	0.88%

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JOHN E MORGAN FDN-SUB AC

Trade date basis

ACCOUNT HOLDINGS

Cash and short term

	Shares/units	Average tax cost per share/unit	Tax cost	Market value per share/unit	Market value	Percent of asset class	Unrealized gain/loss	Estimated annual income	Current yield
BESSEMER SWEEP PROGRAM 0 150 %	203,450 450	\$1 00	\$203,450	\$1 000	\$203,450	100 0%		\$305	0 15%
Total cash and short term			\$203,450		\$203,450	100.0%		\$305	

Fixed income

US government

FEDERAL HOME LOAN BANK 5 125 % Due 09/10/2010	10,000	\$100 83	\$10,083	\$103 281	\$10,328	0 9%	\$245	\$512	4 96%
FEDERAL HOME LOAN BANK 5 250 % Due 06/10/2011	185,000	99 41	183,915	105 906	195,926	17 6	12,011	9,712	4 96
FEDERAL HOME LOAN BANK 4 875 % Due 12/14/2012	25,000	101 89	25,472	108 406	27,101	2 4	1,629	1,218	4 50
FEDERAL HOME LOAN BANK 3 750 % Due 06/14/2013	25,000	97 56	24,391	105 156	26,289	2 4	1,898	937	3 57
FEDERAL HOME LOAN BANK 3 400 % Due 06/17/2014	200,000	100 38	200,768	103 344	206,688	18 6	5,920	5,800	3 29
US TREASURY NOTES 4 625 % Due 11/15/2016	270,000	102 12	275,737	108 195	292,126	26 3	16,389	12,487	4 27
Total US government			\$720,366		\$758,458	68.2%	\$38,092	\$31,666	4.18%

Corporate

GENERAL ELEC CAP CORP TLGP 1 625 % Due 01/07/2011 Aaa /AAA	30,000	\$99 93	\$29,979	\$101 050	\$30,315	2 7%	\$336	\$487	1 61%
AMGEN INC 0 125 % Due 02/01/2011 A3 /A+	40,000	93 75	37,500	98 750	39,500	3 6	2,000	50	0 13

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Corporate - continued	Shares/units	Average tax cost per share/unit	Tax cost	Market value per share/unit	Market value	Percent of asset class	Unrealized gain/loss	Estimated annual income	Current yield
MEDTRONIC INC NOTE 1 500 % Due 04/15/2011 A1 /AA-	30,000	95 00	28,500	101 500	30,450	2 7	1,950	450	1 48
GENERAL ELEC CAP CORP 5 250 % Due 10/19/2012 Aa2 /AA+	30,000	104 58	31,373	106 422	31,926	2 9	553	1,575	4 93
IBM CORP 2 100 % Due 05/06/2013 A1 /A+	40,000	99 92	39,967	99 800	39,920	3 6	(47)	840	2 10
AMER EXPRESS CREDIT CO 7 300 % Due 08/20/2013 A2 /BBB+	20,000	99 84	19,967	112 388	22,477	2 0	2,510	1,460	6 50
NOVARTIS CAPITAL CORP 4 125 % Due 02/10/2014 Aa2 /AA-	25,000	99 90	24,974	105 118	26,279	2 4	1,305	1,031	3 92
PROCTER & GAMBLE CO 3 500 % Due 02/15/2015 Aa3 /AA-	30,000	99 58	29,874	102 301	30,690	2 8	816	1,050	3 42
Pfizer Inc 5 350 % Due 03/15/2015 A1 /AA	30,000	99 87	29,962	109 290	32,787	3 0	2,825	1,605	4 90
TRANSOCEAN INC CONV SER B 1 500 % Due 12/15/2037 Baa2 /BBB+	40,000	90 31	36,125	96 500	38,600	3 5	2,475	600	1 55
Total corporate			\$308,221		\$322,944	29.0%	\$14,723	\$9,148	2.83%

International

SHELL INTERNATIONAL FIN 4.000 % Due 03/21/2014 Aa1 /AA	30,000	\$99 97	\$29,991	\$104.353	\$31,305	2.8%	\$1,314	\$1,200	3.83%
Total fixed income			\$1,058,578		\$1,112,707	100.0%	\$54,129	\$42,014	3.78%

U.S. Large cap

Consumer discretionary

DISNEY (WALT) HOLDING CO (DIS)	850	\$22 30	\$18,951	\$32 250	\$27,412	2 6%	\$8,461	\$297	1 09%
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Statement dated December 31, 2009

JOHN E MORGAN FDN-SUB AC

Trade date basis

	Shares/units	Average tax cost per share/unit	Tax cost	Market value per share/unit	Market value	Percent of asset class	Unrealized gain/loss	Estimated annual income	Current yield
KOHL'S CORP (KSS)	525	43.45	22,812	53.930	28,313	2.6	5,501		
LOWES COS INC (LOW)	1,400	21.25	29,752	23.390	32,746	3.1	2,994	504	1.54
STAPLES INC (SPLS)	1,450	24.13	34,994	24.590	35,655	3.3	661	478	1.34
Total consumer discretionary			\$106,509		\$124,126	11.6%	\$17,617	\$1,279	1.03%
Consumer staples									
PROCTER & GAMBLE CO (PG)	750	\$67.34	\$50,507	\$60.630	\$45,472	4.2%	(\$5,035)	\$1,320	2.90%
WAL-MART STORES INC (WMT)	650	46.36	30,137	53.450	34,742	3.2	4,605	708	2.04
Total consumer staples			\$80,644		\$80,214	7.5%	(\$430)	\$2,028	2.53%
Energy									
APACHE CORP (APA)	325	\$104.38	\$33,925	\$103.170	\$33,530	3.1%	(\$395)	\$195	0.58%
EOG RES INC (EOG)	425	99.89	42,452	97.300	41,352	3.9	(1,100)	246	0.60
HESS CORP (HES)	575	57.97	33,335	60.500	34,787	3.2	1,452	230	0.66
WEATHERFORD INTL LTD	1,550	18.57	28,779	17.910	27,760	2.6	(1,019)		
Total energy			\$138,491		\$137,429	12.8%	(\$1,062)	\$671	0.49%
Financials									
AMERICAN EXPRESS (AXP)	950	\$35.12	\$33,361	\$40.520	\$38,494	3.6%	\$5,133	\$684	1.78%
JPMORGAN CHASE & CO (JPM)	850	42.84	36,414	41.670	35,419	3.3	(995)	170	0.48
MORGAN STANLEY GRP INC (MS)	1,250	30.34	37,924	29.600	37,000	3.5	(924)	250	0.68
T ROWE PRICE GROUP INC (TROW)	600	53.48	32,087	53.250	31,950	3.0	(137)	600	1.88
Total financials			\$139,786		\$142,863	13.3%	\$3,077	\$1,704	1.19%
Health care									
CELGENE CORP (CELG)	650	\$39.45	\$25,642	\$55.680	\$36,192	3.4%	\$10,550		

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JOHN E MORGAN FDN-SUB AC

Trade date basis

	Shares/units	Average tax cost per share/unit	Tax cost	Market value per share/unit	Market value	Percent of asset class	Unrealized gain/loss	Estimated annual income	Current yield
JOHNSON & JOHNSON (JNJ)	325	52.32	17,004	64.410	20,933	2.0	3,929	637	3.04
Pfizer Inc (PFE)	1,650	17.29	28,526	18.190	30,013	2.8	1,487	1,188	3.96
TEVA PHARM INDS LTD ADR	400	47.65	19,060	56.180	22,472	2.1	3,412	192	0.86
THERMO FISHER SCIENTIFIC (TMO)	475	39.80	18,903	47.690	22,652	2.1	3,749		
Total health care			\$109,135		\$132,262	12.3%	\$23,127	\$2,017	1.53%

Industrials

FEDEX CORP (FDX)	275	\$80.95	\$22,261	\$83.450	\$22,948	2.1%	\$687	\$121	0.53%
ILLINOIS TOOL WORKS INC (ITW)	750	48.09	36,067	47.990	35,992	3.4	(75)	930	2.58
INGERSOLL-RAND PUBLIC LTD	900	35.91	32,316	35.740	32,166	3.0	(150)	252	0.78
TYCO INTL LTD NEW	950	35.29	33,522	35.680	33,896	3.2	374	760	2.24
UNION PACIFIC CORP (UNP)	350	65.50	22,924	63.900	22,365	2.1	(559)	378	1.69
UNITED PARCEL SERVICE CL B (UPS)	350	52.38	18,334	57.370	20,079	1.9	1,745	630	3.14
Total industrials			\$165,424		\$167,446	15.6%	\$2,022	\$3,071	1.83%

Information technology

CISCO SYSTEMS INC (CSCO)	1,950	\$20.56	\$40,085	\$23.940	\$46,683	4.4%	\$6,598		
CORNING INC (GLW)	1,450	11.30	16,388	19.310	27,999	2.6	11,611	290	1.04
EMC CORP (EMC)	1,850	16.99	31,424	17.470	32,319	3.0	895		
GOOGLE INC (GOOG)	55	621.47	34,181	619.980	34,098	3.2	(83)		
MICROSOFT CORP (MSFT)	1,150	30.13	34,645	30.480	35,052	3.3	407	598	1.71
PAYCHEX INC (PAYX)	1,050	30.14	31,652	30.640	32,172	3.0	520	1,302	4.05
Total information technology			\$188,375		\$208,323	19.4%	\$19,948	\$2,190	1.05%

Materials

DOW CHEMICAL (DOW)	1,200	\$26.70	\$32,040	\$27.630	\$33,156	3.1%	\$1,116	\$720	2.17%
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Statement dated December 31, 2009
- JOHN E MORGAN FDN-SUB AC

Trade date basis

	Shares/units	Average tax cost per share/unit	Tax cost	Market value per share/unit	Market value	Percent of asset class	Unrealized gain/loss	Estimated annual income	Current yield
INTERNATIONAL PAPER (IP)	1,750	26.06	45,603	26.780	46,865	4.4	1,262	175	0.37
Total materials			\$77,643		\$80,021	7.5%	\$2,378	\$895	1.12%
Total u.s. large cap			\$1,006,007		\$1,072,684	100.0%	\$66,677	\$13,855	1.29%

Non-U.S. Large cap

Non-U.S. large cap funds

OLD WESTBURY NON-US LC FD BOOK COST 496,000	54,926,739	\$9.03	\$496,000	\$9.300	\$510,818	100.0%	\$14,818	\$7,195	1.41%
Total non-u.s. large cap			\$496,000		\$510,818	100.0%	\$14,818	\$7,195	1.41%

Global Small & Mid cap

Global small & mid cap funds

OLD WEST GL SM & MD CAP FD BOOK COST 537,333	50,341,752	\$10.67	\$537,333	\$12.770	\$642,864	100.0%	\$105,531	\$5,235	0.81%
Total global small & mid cap			\$537,333		\$642,864	100.0%	\$105,531	\$5,235	0.81%

Trade date basis

Global Opportunities

Global opportunities funds

	Shares/units	Average tax cost per share/unit	Tax cost	Market value per share/unit	Market value	Percent of asset class	Unrealized gain/loss	Estimated annual income	Current yield
OLD WESTBURY GL OPPTIES FD BOOK COST 574,000	83,950,642	\$6.84	\$574,000	\$7,070	\$593,531	100.0%	\$19,531	\$14,103	2.38%
Total global opportunities			\$574,000		\$593,531	100.0%	\$19,531	\$14,103	2.38%

Real Return / Commodities

Real return funds

OLD WESTBURY REAL RETRN FD BOOK COST 306,000	24,894,159	\$12.29	\$306,000	\$9,860	\$245,456	100.0%	(\$60,544)	\$2,165	0.88%
Total real return / commodities			\$306,000		\$245,456	100.0%	(\$60,544)	\$2,165	0.88%

Total value of account

					\$4,381,510		\$200,142	\$84,872	1.94%
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Total interest and dividends accrued

					Market value				
					6,853				

Total value of account including accruals

					\$4,388,363				
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**Application for Extension of Time To File an
Exempt Organization Return**

OMB No. 1545-1709

► 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 ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Electronic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*.

Type or print	Name of Exempt Organization	Employer identification number
	JOHN E MORGAN FOUNDATION, INC	56-2290010
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P.O. box, see instructions.	
	C/O BESSEMER TRUST, 630 FIFTH AVE	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	NEW YORK, NY 10111	

Check type of return to be filed (file a separate application for each return)

- | | | |
|---|--|------------------------------------|
| ☐ Form 990 | ☐ Form 990-T (corporation) | ☐ Form 4720 |
| ☐ Form 990-BL | ☐ Form 990-T (sec 401(a) or 408(a) trust) | ☐ Form 5227 |
| ☐ Form 990-EZ | ☐ Form 990-T (trust other than above) | ☐ Form 6069 |
| ☒ Form 990-PF | ☐ Form 1041-A | ☐ Form 8870 |

BESSEMER TRUST COMPANY

- The books are in the care of ► **630 FIFTH AVENUE 34TH FLOOR - NEW YORK, NY 10111**

Telephone No. ► **(212) 651-1048**

FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover

- 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2010**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☒ calendar year **2009** or
- ☐ tax year beginning _____, and ending _____

- 2 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	\$	13,431.
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	25,000.
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	3c	\$	0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).		
Type or print File by the extended due date for filing the return. See instructions.	Name of Exempt Organization	Employer identification number
	JOHN E MORGAN FOUNDATION, INC	56-2290010
	Number, street, and room or suite no. If a P.O. box, see instructions	For IRS use only
	C/O BESSEMER TRUST, 630 FIFTH AVE	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	NEW YORK, NY 10111	

Check type of return to be filed (File a separate application for each return):

- ☐ Form 990 ☐ Form 990-EZ ☐ Form 990-T (sec 401(a) or 408(a) trust) ☐ Form 1041-A ☐ Form 5227 ☐ Form 8870
☐ Form 990-BL ☒ Form 990-PF ☐ Form 990-T (trust other than above) ☐ Form 4720 ☐ Form 6069

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

BESSEMER TRUST COMPANY

- The books are in the care of **630 FIFTH AVENUE 34TH FLOOR - NEW YORK, NY 10111**

Telephone No **(212) 651-1048**

FAX No

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until **NOVEMBER 15, 2010**

5 For calendar year **2009**, or other tax year beginning , and ending

6 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

7 State in detail why you need the extension

INFORMATION NEEDED FOR A COMPLETE AND ACCURATE TAX RETURN IS UNAVAILABLE AT THIS TIME.

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	8a	\$	13,182.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	25,000.
c Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	8c	\$	0.

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature **Kevin Morgan** Title **Agent**

Date **8-10-10**

Form **8868** (Rev. 4-2009)