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## Form 990-PF

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

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Service Note The foundation may be able to use a c

For ca	llendar year 2009, or tax year beginning	, 2009	, and ending	, , ,	<del></del>
G Ch	eck all that apply Initial return Initia	al Return of a former p	<i>'</i> —	Fina	al return
	Amended return	Address of		change	
Use IRS la		МΤΤΕΙΧΜ	A	• •	nber
Other		MIIUWM	B	58-2535819 Telephone number (see the	instructions)
prii or ty	nt P. O. Box 6438		·	reseptione trainber (see ale	matractions)
See Sp Instruc	ecific MACON, GA 31208		C		
<b>H</b> (	Check type of organization X Section 501	(c)(3) exempt private f	oundation	2 Foreign organizations meet	ing the 85% test, check
	Section 4947(a)(1) nonexempt charitable tr		private foundation	here and attach computation  If private foundation status	LJ
I F	Grand David II and the control (a) then 10)	ounting method X Ca	ash	under section 507(b)(1)(A)	
▶ 9	. ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' '	Other (specify) column (d) must be or	rash basis	If the foundation is in a 60 under section 507(b)(1)(B)	
Part		(a) Revenue and	(b) Net investment		
	Expenses (The total of amounts in columns (b), (c), and (d) may not neces-	expenses per books	income	(c) Adjusted net income	(d) Disbursements for charitable
	sarily equal the amounts in column (a)				purposes (cash basis only)
	(see the instructions) )  1 Contributions, gifts, grants, etc. received (att sch)				(===:: ================================
	2 Ck   X if the foundn is not req to att Sch B				
	3 Interest on savings and temporary			N7 / 7	
	cash investments 4 Dividends and interest from securities	8,223.	8,223	N/A	
	5a Gross rents	0,223.			
_	b Net rental income or (loss)			7.374	
R E V	<b>6a</b> Net gain/(loss) from sale of assets not on line 10 <b>b</b> Gross sales price for all  285, 588.	-97,794.			
V E	assets on line 6a 7 Capital gain net income (from Part IV, line 2).		0		
N	8 Net short-term capital gain				
E	9 Income modifications				
	10 a Gross sales less returns and allowances.				
	b Less Cost of goods sold				
	c Gross profit/(loss) (att sch)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	-89,571.	8,223		
	13 Compensation of officers, directors, trustees, etc	0.			
	14 Other employee salaries and wages 15 Pension plans, employee benefits		<del></del>	-	-
Δ	10-1				
A D M	<b>b</b> Accounting fees (attach sch)				
Ņ	c Other prof fees (attach sch) See St 1	2,765.	2,765		
PS	17 Interest	141.	1.41	<del>                                     </del>	
OPERATING AND	19 Deoleciation (attach O	141.	141	•	
JI T ⊴J I	sch) and depletion				
S E	20 Occupancy 1 2010 Q 21 Travel, conferences, arcongeetings				
EN E	N  ***		·		
AND EXPENS	123 Other expenses (affach schedule) See Statement 3	525.			
N S	24 Total operating and administrative				<del></del>
S	expenses. Add lines 13 through 23	3,431.	2,906		
	25 Contributions, gifts, grants paid Part XV Contributions and disbursements.	28,450.	·		28,450.
	Add lines 24 and 25.	31,881.	2,906	.	28,450.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-121,452.			
	<b>b</b> Net investment income (if negative, enter 0)		5,317		
044	C Adjusted net income (if negative, enter -0)	<u> </u>			Form <b>990-PF</b> (2009)
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Part	ш	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End o	t year
ait	<u>'''</u>	(See instructions )	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash – non-interest-bearing	4,268.	6,943.	7,661.
	2`	Savings and temporary cash investments			
	3	Accounts receivable			
		Less allowance for doubtful accounts	_		
	4	Pledges receivable		-	
		Less allowance for doubtful accounts			·
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
	_	disqualified persons (attach schedule) (see the instructions)			
Δ	<i>'</i>	Other notes and loans receivable (attach sch)			
A S E T		Less allowance for doubtful accounts ▶		· · · · · · · · · · · · · · · · · · ·	<del></del>
E	8	Inventories for sale or use		<del></del>	
Ŧ	9	Prepaid expenses and deferred charges			<del></del>
S	10:	a Investments — U.S. and state government obligations (attach schedule)			
	1	b Investments — corporate stock (attach schedule)	305,047.	251,358.	251,358.
	•	c Investments — corporate bonds (attach schedule) Statement 4		50,700.	50,700.
	11	Investments — land, buildings, and equipment basis ►			
		Less accumulated depreciation (attach schedule)			
	12	Investments – mortgage loans			
	13	, i		·	
	14	· · · · · · · · · · · · · · · · · · ·			
		Less: accumulated depreciation (attach schedule)			
	15	Other assets (describe			
	16	Total assets (to be completed by all filers – see instructions Also, see page 1, item I)	300,779.	309,001.	309,719.
Ļ	17	Accounts payable and accrued expenses			
A	18	Grants payable			
В	19	Deferred revenue			
Ľ	20	Loans from officers, directors, trustees, & other disqualified persons.			
Ţ	21	Mortgages and other notes payable (attach schedule)			
T	22	Other liabilities (describe			
E S	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here			
		and complete lines 24 through 26 and lines 30 and 31.			
N F E U	24	Unrestricted			
E U	25	Temporarily restricted			
, D	26	Permanently restricted			
SBSA		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
A B S A L A	27	Capital stock, trust principal, or current funds			
SNC	28	Paid-in or capital surplus, or land, building, and equipment fund.			
O E	29	Retained earnings, accumulated income, endowment, or other funds	300,779.	309,001.	
RS	30	Total net assets or fund balances (see the instructions)	300,779.	309,001.	
	31	Total liabilities and net assets/fund balances (see the instructions)	300,779.	309,001.	
Part	III	Analysis of Changes in Net Assets or Fund Balance		303,001.	<u> </u>
				area with	
1	rota end-	I net assets or fund balances at beginning of year – Part II, colu of-year figure reported on prior year's return)	mn (a), line 30 (must a	gree with 1	300,779.
2	Ente	er amount from Part I, line 27a		2	-121,452.
3	Other	ıncreases not included in line 2 (itemize) ► See Statement_	5	3	129,674.
4	Add	lines 1, 2, and 3	· <del>-</del> <del>-</del> -	4	309,001.
5	Decre	ases not included in line 2 (itemize)		5	
6	Tota	I net assets or fund balances at end of year (line 4 minus line 5)	- Part II, column (b), I	ine 30 <b>6</b>	309,001.

(a) List and descri	be the kind(s) of property sold (e.g., ruse, or common stock, 200 shares ML	eal estate, (b) Ho	w acquired Purchase	(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a See Statement 6			Donation		
b '		<del></del>		-	
c					
d				,	
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gain or (e) plus (f) m	
a					
b					
С					
d					
e					
Complete only for assets sho (i) Fair Market Value as of 12/31/69	wing gain in column (h) and owned b (j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	tr	(I) Gains (Col gain minus column ( nan -0-) or Losses (fi	k), but not less
a					
b					
С					
d					
e				·	
2 Capital gain net income or (r	_	enter in Part I, line 7 er -0- in Part I, line 7	2		-97,794.
If gain, also enter in Part I, li	r (loss) as defined in sections 1222(5) ine 8, column (c) (see the instructions	· · · · · · · · · · · · · · · · · · ·	3		0
In Part I, line 8.  Part V Qualification Under	er Section 4940(e) for Reduced	Tay on Not Investment Inc		<u> </u>	0.
If 'Yes,' the foundation does not qu	ection 4942 tax on the distributable ai ualify under section 4940(e) Do not co it in each column for each year, see th	omplete this part		Yes	X No
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	<b>(c)</b> Net value of noncharitable-use assets	(co	<b>(d)</b> Distribution lumn (b) divided	
2008	27,555.	427,55	3.		0.064448
2007	39,575.	540,49			0.073220
2006	42,386.	510,33			0.083055
2005	32,960.	571,02			0.057721
2004	48,324.	530,58	3.		0.091077
2 Total of line 1, column (d)			2		0.369521
3 Average distribution ratio for number of years the foundation	the 5-year base period—divide the to ion has been in existence if less than	tal on line 2 by 5, or by the 5 years	_3		0.073904
4 Enter the net value of nonch	arıtable-use assets for 2009 from Part	X, line 5	4		293,214.
5 Multiply line 4 by line 3			5		21,670.
6 Enter 1% of net investment i	ncome (1% of Part I, line 27b)		6		53.
7 Add lines 5 and 6			7		21,723.
8 Enter qualifying distributions	from Part XII, line 4		8		28,450.
If line 8 is equal to or greater Part VI instructions	r than line 7, check the box in Part VI	, line 1b, and complete that part	using a		e the n <b>990-PF</b> (2009)
BAA				E	

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?  b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?  If the answer is "Yes" to Ta or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities  c Did the foundation file Form 1120-POL for this year?  d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year  (1) On the foundation \$\frac{\sigma}{\sigma}\$ 0, (2) On foundation managers \$\frac{\sigma}{\sigma}\$ 0,  e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers  ** \frac{\sigma}{\sigma}\$ 0, 2 (2) On foundation managers  ** \frac{\sigma}{\sigma}\$ 0,		n 990-PF (2009) THE BERTRAM AND PAIRICIA WITHAM 58-25358	319		Р	age 4
bothesists foundations that meet the section 4940(e) requirements in Parl V.  check here * and enter 1% of Parl I, line 27b  c All other danistic foundations eiter 2% of Parl I, line 27b  c All other danistic foundations eiter 2% of line 27b Eremat freega organizations enter 4% of Parl I, line 12, column (b)  2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)  3 Add lines 1 and 2  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 flue 4 from line 3 it zero or less, enter -0-  5 Tax based on investment income. Subtract flue 4 from line 3 it zero or less, enter -0-  5 Tax based tax parls and 208 corpsyment credited to 209  b Evempt foreign organizations — tax withheld at source  6 Crodits/Payments  a 209 estimated tax parls and 208 overpsyment credited to 209  b Evempt foreign organizations — tax withheld at source  6 Tax paid with application for extension of time to file (Form 8865)  6 Crodits/Payments  7 Total credit and payments of extension of time to file (Form 8865)  8 Enter any penalty for underpayment of estimated tax. Check here file Form 2220 is attached  8 Tax die. If the total of lines 5 and 8 is more than line 7, ester amount overed  10 Toverpyment line 7 is not the total of lines 3 and 5, ester the amount overpaid.  11 Total credit line 7 is not the total of lines 3 and 5, ester the amount overpaid.  11 Depart VII-A S Istamements Regardding Activities  13 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or interview in any political campangin?  15 Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition):  16 Tax and the activities of the activities of incorporation, or bylaws, or other similar instruments? If Yes, and the activities of incorporation, or bylaws, or other similar instrumen			tructi	ons)		
b Domestic Coundations that meet the section 4940(e) requirements in Part V, check here   X  and enter 11% of Part I, line 27b c All other domestic foundations enter 3% of lane 27b Exempt foreign organizations enter 4% of Part I, line 12, colemn (b)  2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)  3 Add lines 1 and 2  5 Tax under section 511 (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-)  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-)  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-)  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-)  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-)  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-)  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-)  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-)  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-)  6 Backup withholding erroneously withheld  7 Total credits and payments. Add lines 5 although 6d.  8 Enter any penalty for underpayment of estimated tax. Check here if if Form 2220 is attached  8 Total credits and payments. Add lines 5 and 8, enter the amount ower of the form 2220 is attached.  8 Total credits and payments. Add lines 5 and 8, enter the amount ower of the 11 lines the amount of lines 10 to undertoon attempts to well and 11 lines 1 lines	1 a					1
check here						
c All other domestic foundations eater 2% of the 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)  2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)  3 Add lines 1 and 2  5 Subtille A (nocome) 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-  5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-  5 Credist2-pyments  a 200 estimated tax prists and 2008 everpreyment credited to 2009  b Exempt foreign organizations — tax withheld at source  6 Tax paid with application for extension of time to file (Form 8868)  6 Exempt foreign organizations — tax withheld at source  7 Total credits and payments Add lines 5 at through 5d  8 Enter any penalty for underpayment of estimated tax. Check here for a file of the total rines as an 8 is more than his -1, eter amount owed  9 Tax dis. If the total rines a sale is more than his -1, eter amount owed  9 Tax dis. If the total rines a sale is more than his -1, eter amount owed  9 Tax dis. If the total rines a sale is more than his -1, eter amount ower paid to the credited to 2010 estimated tax.  Part VII-A (Statements Regarding Activities)  1 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 campagin?  1 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 campagin?  1 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 campagin?  1 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 campagin?  1 During the tax year, did the foundation a	ŀ					<u>53.</u>
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a Add lines 1 and 2 3 Add lines 1 and 2 5 Stax based on investment income, Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income, Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income, Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income, Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income, Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income, Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income, Subtract line 4 from line 3 if zero or less, enter 0- 6 Tax based on investment income, Subtract line 4 from line 3 if zero or less, enter 0- 6 Tax based on investment income, Subtract line 4 from line 3 if zero or less, enter 0- 6 Tax based on investment income, Subtract line 4 from line 3 if zero or less, enter 0- 6 Tax based on investment income, Subtract line 4 from line 3 if zero or less, enter 0- 6 Tax paid with application for extension of time to line 6 for display the subtract line 4 from line 5 for display the subtract line 6	•	c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)		-		
3 Add lines 1 and 2 4 Subtile 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- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based and 2008 overpayment credited to 2009 6 Exempt foreign organizations — tax withheld at source 6 Tax paid with application for extension of time to file (Form 8868) 6 Ede and Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of settinated tax. Check here of the form 2220 is attached 8 Enter any penalty for underpayment of strainated tax. Check here of form 2220 is attached 8 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 bat of lines 5 and 8, enter the amount owerpaid 11 Center the amount of line 10 be Ordelided to 2010 estimated tax. Refunded 11 Tenter the amount of line 10 be Ordelided to 2010 estimated tax. Refunded 11 During the tax year, dot the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1 During the tax year, dot the foundation and the foundation of the activities 1 Description of the foundation of t	2		-			
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5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 6 Credits/Payments a 2009 etimated tax pints and 2008 overpayment credited to 2009 b Exempt foreign organizations – tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here I ferror 2220 is attached 8 Enter any penalty for underpayment of estimated tax. Check here I ferror 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment I file 7 is more than line 10, enter amount owed 11 Enter the amount of line 10 to the Credited to 2010 estimated tax.  Part VII-A   Statements Regarding Activities  11 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?  12 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?  13 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?  14 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?  15 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?  16 During the tax year, did the foundation in connection with the activities and copies of any materials published or distributed by the foundation on connection with the activities and copies of any materials published or distributed by the foundation on connection with the activities and copies of any materials published or distributed by the foundation fou	3					
6 Credits/Payments a 2009 estimated tarpitis and 2008 overpayment credited to 2009 b Exempt foreign organizations — tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 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?, either amount owned 10 overpayment. If line? is more than the total of lines 5 and 8, enter the amount overpaid 11. Enter the amount of line (10 to b. Credited to 2019 estimated tax.  Part VII-A   Statements Regarding Activities 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?  b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?  b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?  c Did the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities.  1b	4					
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b Exempt foreign organizations — tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroreously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here  for Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 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 be Credited to 2019 estimated tax.    Part VIII-A   Statements Regarding Activities   Ta During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participated or indervene in any political campaign?   Tax of the total of the state of distributed by the foundation attempt to influence any national, state, or local legislation or did it participated by the foundation attempt to influence any national, state, or local legislation or did it participated or indervene in any political campaign?   Tax of the state of the state of the state of the state of distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities and copies of any materials published or distributed by the foundation of the form 1120-POL for this year?   If the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation managers						
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7 X  8a Enter the states to which the foundation reports or with which it is registered (see the instructions)  N/A  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  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		• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict	-			اــــــــــا
8a Enter the states to which the foundation reports or with which it is registered (see the instructions)  N/A  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  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  9 X		with the state law remain in the governing instrument?	⊢		_	<u> </u>
N/A  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 <i>General Instruction G? If 'No,' attach explanation</i> .  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)? <i>If 'Yes,' complete Part XIV</i> 9 X	7			7	<u> X</u>	<del>                                     </del>
(or designate) of each state as required by <i>General Instruction G? If 'No,' attach explanation</i> 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)? <i>If 'Yes,' complete Part XIV</i> 9 X	8		-			
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 9 X	ļ	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	_		х	
for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If 'Yes,' complete Part XIV 9 X	•		)(E)			
	9	for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If 'Yes,' complete Part		9		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names	10			10		,
and addresses.   10   X    BAA   Form 990-PF (2009)		<del></del>	— L		n.pr	

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	m 990-PF (2009) THE BERTRAM AND PATRICIA WITHAM	58-253581	9	Р	age 5
Par	t 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	_	Х
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?		12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption	application?	13	Х	
	Website address ► N/A				
14		no ► 478-74	12-3	313	
	Located at ► 1020 RIVERSIDE DRIVE MACON GA ZIP + 4 ►	31208			 
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here	-11	N/A		
	and enter the amount of tax-exempt interest received or accrued during the year	▶ 15			N/A
Pai	t VII-B   Statements Regarding Activities for Which Form 4720 May Be Required				
	File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.			Yes	No
1	a During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No		-	
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes X No			
	(E) Transfer any magnetic to a diagnalified person (or make any of either evallable				
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	Yes X No			
	(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days )	Yes X No			
	b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see the instruction	ns)?	1 b	N	/A
	Organizations relying on a current notice regarding disaster assistance check here	▶ 🗌			
	c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1 c		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 X No			
	If 'Yes,' list the years ▶ 20 , 20 , 20 , 20				
	<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a	a)(2)			
	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a				-
	all years listed, answer 'No' and attach statement — see the instructions )		2b	N	/A
	c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years he	ere			
	► 20 , 20 , 20 , 20				
3	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	Yes X No		·	
	b If 'Yes,' did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved	_			
	by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009).		3b	N	/A
4	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		Х
	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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Form **990-PF** (2009)

Form 990-PF (2009) THE BERTRAM AND PA			58-25	35819	Page
Part VII-B   Statements Regarding Activit		n 4720 May Be Req	uired (continued)		
5a During the year did the foundation pay or incu	-				
(1) Carry on propaganda, or otherwise attemp	ot to influence legislation	on (section 4945(e))?	∐ Yes X	No	
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	ation drive?	-	Yes X	No	
(3) Provide a grant to an individual for travel,	study, or other similar	purposes?	☐ Yes X	No	<u> </u>  -
(4) Provide a grant to an organization other to in section 509(a)(1), (2), or (3), or section	han a charitable, etc, o 4940(d)(2)? (see instr	rganization described uctions)	Yes X	No	
(5) Provide for any purpose other than religio educational purposes, or for the prevention	us, charitable, scientifi n of cruelty to children	c, literary, or or animals?	Yes X	No	
<b>b</b> If any answer is 'Yes' to 5a(1)-(5), did <b>any</b> of described in Regulations section 53 4945 or in (see instructions)?	the transactions fail to a current notice regar	qualify under the excep ding disaster assistance	tions	5b	N/A
Organizations relying on a current notice rega	rding disaster assistan	ce check here	▶ [		
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon If 'Yes,' attach the statement required by Reg	sibility for the grant?	•	N/A Yes	] No	
6a Did the foundation, during the year, receive all on a personal benefit contract?			Yes X	No	
<b>b</b> Did the foundation, during the year, pay prem	iums, directly or indired	ctly, on a personal bene	fit contract?	6ь	<u> </u>
If 'Yes' to 6b, file Form 8870  7a At any time during the tax year, was the found	tation a narty to a prob	whited tax chalter transs	ection? Yes X	No	
<b>b</b> If yes, did the foundation receive any proceed				7b	N/A
Part VIII Information About Officers, D					<u> </u>
and Contractors					<u> </u>
1 List all officers, directors, trustees, foundation					
(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense other allo	
See Statement 7					
		0.	0.		0.
2 Compensation of five highest-paid employee	s (other than those inc	luded on line 1— see ir	structions). If none, e	ıter 'NONE.'	
(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense other allo	
None					
	<u> </u>				
Total number of other employees paid over \$50,000	TEE 002061 1	77/06/00	<b>&gt;</b>	Form 990	0 LPF (2009)

Part VIII Information About Officers, Directors, Trustees, Foundat and Contractors (continued)	ion Managers, Highly Paid E	mployees,
3 Five highest-paid independent contractors for professional services — (see insenter 'NONE.'	structions). If none,	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
None	(2), (3)	(-) · · · · · · · · · · · · · · · · ·
	İ	
Total number of others receiving over \$50,000 for professional services.	<b>•</b>	0
Part IX-A Summary of Direct Charitable Activities		
Fart IX-A   Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical inforganizations and other beneficiaries served, conferences convened, research papers produced, etc.	ormation such as the number of	Expenses
1 N/A		
2		
3		
·		
4		
Part IX-B Summary of Program-Related Investments (see instruction	ons)	
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	<u> </u>	0.
BAA		Form <b>990-PF</b> (2009)

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Form 990-PF (2009)

Par	Minimum Investment Return (All domestic foundations must complete this part. For see instructions)	oreign foi	undations,
1 a	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	289,383.
t	Average of monthly cash balances	1 b	8,296.
c	Fair market value of all other assets (see instructions)	1c	
5	d Total (add lines 1a, b, and c)	1d	297,679.
е	Reduction claimed for blockage or other factors reported on lines 1a and 1c		
	(attach detailed explanation) . le0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	297,679.
4	Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	4,465.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	293,214.
6	Minimum investment return. Enter 5% of line 5	6	14,661.
Par	TXI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private oper and certain foreign organizations check here ► □ and do not complete this part of the		indations
		1	14,661.
	a Tax on investment income for 2009 from Part VI, line 5	<del></del>	14,001.
	<del>- 1</del>		
	,		5.2
	C Add lines 2a and 2b	2c	53. 14,608.
_	Distributable amount before adjustments Subtract line 2c from line 1 Recoveries of amounts treated as qualifying distributions	4	14,000.
4 5	Add lines 3 and 4	5	14,608.
6	Deduction from distributable amount (see instructions).	6	14,000.
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	14,608.
<u> </u>	Distributable amount as adjusted. Subtract line o from line 5. Enter here and on Part XIII, fille 1	<del></del>	14,000.
Par	t XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc. purposes Expenses, contributions, gifts, etc — total from Part I, column (d), line 26	1 a	28,450.
	b Program-related investments — total from Part IX-B	1 b	20, 130.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2	
		-	
3 a	Amounts set aside for specific charitable projects that satisfy the a Suitability test (prior IRS approval required)	3a	
t	Cash distribution test (attach the required schedule)	3 b	
4	Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	<u>28,450.</u>
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5	53.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	28,397.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whe qualifies for the section 4940(e) reduction of tax in those years	ther the fo	undation

### Part XIII Undistributed Income (see instructions)

,	<b>(a)</b> Corpus	(b) Years prior to 2008	<b>(c)</b> 2008	<b>(d)</b> 2009
1 Distributable amount for 2009 from Part XI, line 7				14,608.
2 Undistributed income, if any, as of the end of 2009				14,000.
a Enter amount for 2008 only			0.	
<b>b</b> Total for prior years 20 , 20 , 20		0.		
3 Excess distributions carryover, if any, to 2009				· · · · · · · · · · · · · · · · · · ·
<b>a</b> From 2004 3, 469.				
<b>b</b> From 2005 4, 651.				
c From 2006 24, 697.				
<b>d</b> From 2007 12, 794.				
<b>e</b> From 2008 6, 318.				
f Total of lines 3a through e	51,929.			
4 Qualifying distributions for 2009 from Part				
XII, line 4 ► \$ 28,450.				
a Applied to 2008, but not more than line 2a		[-	0.	
<b>b</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.			
<b>d</b> Applied to 2009 distributable amount				14,608.
e Remaining amount distributed out of corpus	13,842.			
5 Excess distributions carryover applied to 2009	0.			0.
(If an amount appears in column (d), the same amount must be shown in column (a) )				
same amount must be snown in column (a) )				
6 Enter the net total of each column as				
indicated below:				
a Corpus. Add lines 3f, 4c, and 4e Subtract line 5	65,771.			AUAULI
<b>b</b> Prior years' undistributed income Subtract	4	_		
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 instructions.		· nore-wan	0.	
f Undistributed income for 2009 Subtract lines				
4d and 5 from line 1. This amount must be				•
distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed				
by section 170(b)(1)(F) or 4942(g)(3)	•			
(see instructions)	0.			
8 Excess distributions carryover from 2004 not	2 460			
applied on line 5 or line 7 (see instructions).	3,469.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	62,302.			
10 Analysis of line 9	02,302.			
a Excess from 2005 4, 651.				i i
<b>b</b> Excess from 2006 24, 697.				I
c Excess from 2007 12,794.				
d Excess from 2008 6, 318.				
e Excess from 2009 13, 842.				
4 EVOCO2 110111 FOOD   12/045 1		<u>L</u> L		

Form 990-PF (2009) THE BERTRAM AND Part XIV Private Operating Foundati			VIII A guartian (	58-2535819	
1a If the foundation has received a ruling or					N/A
is effective for 2009, enter the date of the	e ruling	that it is a private	operating loundation	in, and the runing ▶	
<b>b</b> Check box to indicate whether the foundation	at <mark>ion is a private ope</mark>	rating foundation (	described in section	4942(J)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum investment return from Part X for each year listed	(a) 2009	<b>(b)</b> 2008	(c) 2007	(d) 2006	(e) Tota
<b>b</b> 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed		-			
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a 'Assets' alternative test — enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c 'Support' alternative test — enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					
a List any managers of the foundation who close of any tax year (but only if they have BERTRAM H. WITHAM      b List any managers of the foundation who a partnership or other entity) of which the	ve contributed more own 10% or more o	than \$5,000) (See	e section 507(d)(2) )		
None	e louituation has a 1	o% or greater inte	iest		
2 Information Regarding Contribution, Grace Check here \( \overline{X} \) If the foundation only requests for funds. If the foundation make complete items 2a, b, c, and d.	makes contributions	to preselected cha	arıtable organızatıon	s and does not acce anizations under oth	pt unsolicited er conditions
<b>a</b> The name, address, and telephone numb	per of the person to v	vhom applications	should be addresse	d	
<b>b</b> The form in which applications should be	submitted and infor	mation and materi	als they should inclu	de	
c Any submission deadlines			· · · · · · · · · · · · · · · · · · ·		
d Any restrictions or limitations on awards,	such as by geograp	hical areas, charita	able fields, kinds of	institutions, or other	factors:
				<del> </del>	
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Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the	Year or Approved for Fut	ure Paymen	<u></u>	
, Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	substantial contributor	recipient	Contribution	
Name and address (home or business)  a Paid during the year  See Statement 8	substantial contributor	recipient		
Total			► 3a	28,450.
<b>b</b> Approved for future payment				
Total			<b>▶</b> 3h	
Total			<u>► 3b</u>	

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by	section 512, 513, or 514	
Program service revenue	(a) Business code	<b>(b)</b> Amount	(c) Exclu- sion code	<b>(d)</b> Amount	(e) Related or exempt function income (see the instructions
a					
b					-
С					
d					
e					
f					
<b>g</b> 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	8,223.	· · · · · · · · · · · · · · · · · · ·
5 Net rental income or (loss) from real estate			ļ ļ		
a Debt-financed property		<u>.</u>			-
<b>b</b> Not debt-financed property					
6 Net rental income or (loss) from personal property			<del> </del>		
7 Other investment income		<del>.</del>	18	-97,794.	
8 Gain or (loss) from sales of assets other than inventory			10	-91, 194.	
<ul><li>9 Net income or (loss) from special events</li><li>10 Gross profit or (loss) from sales of inventory</li></ul>			<del>   </del>		
11 Other revenue			<del>                                     </del>		
a					
b					
c	· <del> </del>		<del></del>		
d					
e			<u> </u>	-	
12 Subtotal Add columns (b), (d), and (e)		· · · · · · · · · · · · · · · · · · ·		-89,571.	
13 Total. Add line 12, columns (b), (d), and (e)				13	-89,571
(See worksheet in the instructions for line 13 to verify	calculations)				
Part XVI-B Relationship of Activities to the	Accomplish	ment of Evern	+ Durnacas		

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

Form 990-PF (2009)

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

				<del></del>								
	descr	ne organization directly ibed in section 501(c) ng to political organiza	of the Code (o	engage in a Ither than s	iny of the fol section 501(c	llowing wit c)(3) organ	h any ol izations	ther organization) or in section	on 527,		Yes	No
	<b>a</b> Trans	fers from the reporting	g foundation to	a nonchar	ıtable exemi	pt organiza	ation of					<u> </u> j
	<b>(1)</b> C									1 a (1)		X_
	• •	ther assets								1 a (2)		X
		transactions										
		ales of assets to a nor								1 b (1)		X
	• •	urchases of assets fro		•	it organizatio	on				1 b (2)	L	X
		ental of facilities, equi	•	er assets						1b (3)		X
	` '	eimbursement arrange								1b (4)		X
		oans or loan guarantee								1b (5)		X
		erformance of services		•	•					1b (6)		X
	c Snam	ng of facilities, equipm	ient, mailing lis	sts, other a	issets, or pa	ia empioye	ees			1c		X
	the o	answer to any of the a pods, other assets, or ransaction or sharing a	services diven	hy the ren	iortina found	ation If th	e found:	ation received l	less than fair m	narket value in	ue of	
(z	) Line no	(b) Amount involved			ole exempt organ				nsfers, transactions		ogement	
_	/A	(a) runount involved	(0) 1141110	or mononantax	no onompt organ		(4)		iororo, transactions	, and snaring arra	igenieni	
									·			
										-		
									<del> </del>			
_			_									
						<del></del>		· · · · · ·				
								·				
								<u></u>				
	descr	foundation directly or ibed in section 501(c)	of the Code (o	iated with, other than s	or related to section 501(c	one or motion on the contract of the contract	ore tax- section	exempt organi: 527?	zations	Yes	X	No
	b If 'Ye	s,' complete the follow		1 4	<del></del>							
NT.	/7	(a) Name of organizat	lion	(0	) Type of or	ganization		(0	) Description o	relationship		
14	/A											
				-								
		<del></del>		<del></del>								
—	<u> </u>		<del></del>									
$\neg$	Linder pens	althes of persuny. I declare that	1 have examined th	us ratura unch	idina preampani	una echadulae	and state	monte and to the be	act of my knowledge	and ballof it is tru		
	complete (	alties of perjury, I declare that Declaration of preparer (other	than taxpayer or fic	duciary) is base	ed on all informa	ation of which	preparer h	as any knowledge	est of my knowledge	and belief, it is tru	e, conec	i, and
		$6 \rightarrow 1$	10 -				ى .	-//				
s		redaw B	Lina	,				17/10	► Presid	ent		
GN	Sign	ature of officer or trustee					Date		Title			
- 1		D. annous la	C = 0	T			Date	11	Chask of	Preparer's Identify (See Signature in	ing num	ber
H R E	Paid	Preparer's signature	162 AIM	اما			\	5/14/10	Check if self- employed	N/A	uie insti	(د
E	Pre- parer's	Firm's name (or CLIF	TON LIPPA	RD HARI	DISON &	PARKER	Ţ, Ţ.	<del>d''/'</del>	EIN ► N/A			
	Use	yours if self-		inno	DIDOM W	ringmit	٠٠٠٠.	<u> </u>	LIIV - LV/F	-		
	Only	employed), address, and ZIP code MACC		210-751	1				Phone no	(478) 953	-012	5
↓ BA	Δ	12.000	,		<del></del>				prinone no	Form <b>99</b>		
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2009	Federal Statements THE BERTRAM AND PATRICIA WITHAM	Page 1
*	FOUNDATION, INC.	58-2535819
Statement 1 Form 990-PF, Part I, Line 16c Other Professional Fees	(a) (b) Net (c)	(d)
Investment Fees	Expenses Investment Adjusted Net Income  \$ 2,765. \$ 2,765.  Total \$ 2,765. \$ 2,765.	Charitable Purposes  \$ 0.
Statement 2 Form 990-PF, Part I, Line 18 Taxes		
Federal Taxes	(a) (b) Net (c) Expenses Investment Adjusted per Books Income  \$ 141. \$ 141. Total \$ 141.	(d) Charitable Purposes  \$ 0.
Statement 3 Form 990-PF, Part I, Line 23 Other Expenses		
Secretary of State Small Foundation Dues	(a)       (b)       Net       (c)         Expenses per Books       Investment Income       Adjusted Net Income         \$ 30.       495.         Total       \$ 525.       \$ 0.	(d) Charitable Purposes  \$ 0.
Statement 4 Form 990-PF, Part II, Line 10c Investments - Corporate Bonds		
Corporate Bonds BAC CURR MITS-ERM EMER MK	Valuation Book Method Value  T CURR BSKT SV Mkt Val \$ 50,700. \$ Total \$ 50,700. \$	Fair Market Value 50,700. 50,700.
Statement 5 Form 990-PF, Part III, Line 3 Other Increases		
Unrealized Gain or Loss	Total <u>\$</u>	129,674. 129,674.

2009

## Federal Statements THE BERTRAM AND PATRICIA WITHAM FOUNDATION, INC.

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Statement 6
Form 990-PF, Part IV, Line 1
Capital Gains and Losses for Tax on Investment Income

					(b)	How	(c) Date	(d) Date
<u> Item</u>			<u>scription</u>		<u> </u>		<u>Acquired</u>	Sold
1	40 IShares M				Purch	ased	1/30/2006	1/08/2009
2	120 IShares				Purch	ased	1/30/2006	1/12/2009
3	200 SECTOR S	PDR FINA	NCIAL		Purch	ıased	1/30/2006	1/08/2009
4	1110 IShares	MSCI Ja	pan Index		Purch	ıased	1/30/2006	5/21/2009
5 6	350 ISHARES				Purch	ıased	2/19/2008	5/21/2009
6	215 ISHARES				Purch	ıased	1/30/2006	5/21/2009
7	700 IShares					ıased	1/30/2006	5/21/2009
8	300 IShares				Purch	ıased	1/30/2006	5/21/2009
9	450 IShares				Purch	ased	1/30/2006	5/21/2009
10	200 IShares	S&P Glob	al		Purch	ased	1/30/2006	5/21/2009
11	140 IShares	S&P Glob	al		Purch		1/30/2006	5/21/2009
12	100 IShares				Purch	ased	1/30/2006	5/21/2009
13	100 IShares	S&P Glob	al		Purch	ased	1/30/2006	5/21/2009
14	100 IShares				Purch	ıased	1/30/2006	5/21/2009
15	160 IShares	S&P Glob	al Health		Purch	ıased	1/30/2006	5/21/2009
16	100 IShares	S&P Glob	al Health		Purch	ıased	1/30/2006	5/21/2009
17	350 IShares	S&P Glob	al Info		Purch	ıased	1/30/2006	5/21/2009
18	640 HEALTH C	ARE SELE	CT SPDR		Purch	ıased	1/30/2006	5/21/2009
19	600 SECTOR S	PDR CONS	MRS STPL		Purch	ased	1/30/2006	5/21/2009
20	110 SECTOR S	PDR CONS	MRS STPL		Purch	nased	1/30/2006	5/21/2009
21	175 Sector S	pdr Ener	gy		Purch	nased	1/30/2006	5/21/2009
22	90 Sector Sp	dr Energ	ÿ		Purch	nased	2/19/2008	5/21/2009
23	300 SECTOR S	PDR FINĀ	NCIAL		Purch	nased	1/30/2006	5/21/2009
24	560 Sector S	PDR Indu	strial			nased	1/30/2006	5/21/2009
25	35 Sector SP				Purch	nased	2/19/2008	5/21/2009
26	920 AMEX Tec	hnlgy Se	lect SPDR			nased	1/30/2006	5/21/2009
27	450 AMEX Tec	hnlgy Se	lect SPDR		Purch	ased	2/19/2008	5/21/2009
28	100 SECTOR S	PDRŪTIL	ITIES			ased	1/30/2006	5/21/2009
29	3828.3580 Ja	n Adv Lo	ng Short A			ıased	2/19/2008	6/01/2009
30	68 Jan Adv L	ong Shor	t A		Purch	ased	12/18/2008	6/01/2009
31	1 Jan Adv Lo	ng Short	A		Purch		12/19/2008	6/01/2009
32	1134.0210 MF	S Intl D	iversctn Cl	. A	Purch	nased	11/30/2005	7/09/2009
33	866.5510 Ame	r Cnt In	fl Adj Bd I	nv	Purch	ased	5/22/2009	10/29/2009
	(a)	(f)	(a)	(h)	(1)	(+)	) (k)	. (1)

	(e)	(f)	(g)	(h) Gain	(i) FMV	(j) Adj. Bas.	(k) Excess	(1) Gain
Ttom	Gross <u>Sales</u>	Deprec. Allowed	Cost <u>Basis</u>	(Loss)	12/31/69		(i) - (i)	(Loss)
<u>Item</u>	1,778.	TITOMER	2,510.	-732.	12/31/09	12/31/09		\$ -732.
1	5,829.		5,951.	-122.				-122.
2	2,386.		6,422.	-4,036.				-4,036.
3	10,147.		15,573.	-5,426.				-5,426.
4 <u>.</u>	13,650.		19,404.	-5, 426. -5, 754.				-5,754.
5	9,963.		15,499.	-5,734. -5,536.				-5,536.
9			34,923.	-3,336. -10,746.				-10,746.
,	24,177.							-5,199.
8	13,626.		18,825.	-5,199.				-3,133. -2,271
9	13,388.		15,759.	-2,371.				-2,371.
10	6,121.		7,083.	-962.				-962.
11	4,284.		4,958.	-674.				-674.
12	3,064.		3,542.	-478.				-478.
13	3,070.		3,542.	-472.				-472.
14	4,200.		5,356.	-1,156.				-1,156.
15	6,704.		8,570.	-1,866.				-1,866.
16	4,191.		5,356.	-1,165.				-1,165.
17	14,755.		19,495.	-4,740.				-4,740.
18	16,153.		20,621.	-4,468.				-4,468.
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## Federal Statements THE BERTRAM AND PATRICIA WITHAM FOUNDATION, INC.

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Statement 6 (continued)
Form 990-PF, Part IV, Line 1
Capital Gains and Losses for Tax on Investment Income

Item 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33	(e) Gross Sales 13,656. 2,504. 8,440. 4,341. 3,498. 12,192. 762. 15,566. 7,614. 2,556. 35,336. 628. 9. 11,000. 10,000.	(f) Deprec. Allowed	(g) Cost Basis 14,106. 2,586. 10,143. 6,711. 9,633. 17,718. 1,284. 20,038. 10,058. 3,221. 49,998. 623. 9. 14,368. 9,497.	(h) Gain (Loss) -450821,7032,3706,1355,5265224,4722,44466514,662. 5. 03,368. 503.	(i) FMV 12/31/69	(j) Adj. Bas. 12/31/69	(k) Excess (i)-(j)	(1) Gain (Loss) \$ -450821,7032,3706,1355,5265224,4722,44466514,662. 5. 03,368.
	.,		-,				Total	

Statement 7
Form 990-PF, Part VIII, Line 1
List of Officers, Directors, Trustees, and Key Employees

Name and Address	Title an Average Ho <u>Per Week De</u>	ours	Compen- sation	Contri- bution to EBP & DC	Expense Account/ Other
BERTRAM H. WITHAM 112 Covington Place MACON, GA 31210	President O	\$	0.	\$ 0.	\$ 0.
JANA W. JANEWAY 22 BROAD AXE LANE WILTON, CT 06897	Trustee 0		0.	0.	0.
BRENDA W. MCGINN 1901 TYLER RIDGE, SE SMYRNA, GA 30080	Trustee 0		0.	0.	0.
MARSHA W. WHITMAN 380 SILVERMINE AVENUE NORWALK, CT 06850	Trustee 0		0.	0.	0.
PATRICIA W. DAVIS 1365 LA GRANADA THOUSAND OAKS, CA 91362	Trustee 0		0.	0.	0. )
		Total \$	0.	\$ 0.	\$0.

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# Federal Statements THE BERTRAM AND PATRICIA WITHAM FOUNDATION, INC.

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Statement 8 Form 990-PF, Part XV, Line 3a Recipient Paid During the Year

Name and Address	Donee <u>Relationship</u>	Found- ation Status	Purpose of Grant		_Amount
Wesleyan College 4760 Forsyth Road Macon, GA 31210	N/A		Annual Fund	\$	5,000.
Mount Hermon Christian PO Box 413 Mount Hermon, CA 95041	N/A		Best Use		15,000.
Oaks Christian School 31749 LaTienda Drive Westlake Village, CA 91362	N/A		Best Use		2,500.
Haines Falls Free Library Haines Falls Haines Falls, NY 12436	N/A		Best Use		200.
Covenant Care 3950 Ridge Avenue Macon, GA 31210	N/A		Best Use		1,000.
Berkshire Choral School 245 North Undermountain Road Sheffield, MA 01257	N/A		Best Use		500.
Catskill Mountain Foundation, Inc. 7970 Main Street Hunter, NY 12442	N/A		Best Use		250.
William Jewell College 500 College Hill Liberty, MO 64068	N/A		Best Use		1,000.
Hands of Hope 1011 Cass Street, Suite 108 Monterey, CA 93940	N/A		Seeds in His Garden		2,000.
Harold Wheeler Education Fund 11701 High Drive Leawood, KS 66211	N/A		Memory of Harold Wheeler Risco, MO School District		500.
Wilton Presbyterian Church 48 New Canaan Road Wilton, CT 06897	N/A		Best Use		500.
			Total	<del>.</del>	20 450

Total \$ 28,450.