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Form 990-PF

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning 01-01-2009 , and ending 12-31-2009

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 The Curtis & Edith Munson Foundation		A Employer identification number 59-2235907	
	Number and street (or P O box number if mail is not delivered to street address) 102 N Westgate Avenue		Room/suite	B Telephone number (see page 10 of the instructions) (217) 243-4397
	City or town, state, and ZIP code Jacksonville, IL 62650			

H Check type of organization

☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust

☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 26,309,599

J Accounting method

☒ Cash

☐ Accrual

☐ Other (specify) (Part I, column (d) must be on cash basis.)

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

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

D 1. Foreign organizations, check here

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

C If exemption application is pending, 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) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	634,908	634,908		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	705,695			
	b Gross sales price for all assets on line 6a 2,583,397				
	7 Capital gain net income (from Part IV , line 2)		705,695		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	1,340,603	1,340,603		
	13 Compensation of officers, directors, trustees, etc	67,790	33,895		33,895
	14 Other employee salaries and wages	119,112			119,112
	15 Pension plans, employee benefits	36,363	8,540		27,823
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	6,407	3,204		3,204
	c Other professional fees (attach schedule)	21,581	18,604		2,977
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	49,057	49,057		
	19 Depreciation (attach schedule) and depletion . . .	943			
	20 Occupancy				
	21 Travel, conferences, and meetings	14,758			14,758
	22 Printing and publications				
	23 Other expenses (attach schedule)	76,346	17,164		59,182
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	392,357	130,464		260,951
	25 Contributions, gifts, grants paid	1,516,614			1,516,614
	26 Total expenses and disbursements. Add lines 24 and 25	1,908,971	130,464		1,777,565
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-568,368			
	b Net investment income (if negative, enter -0-)		1,210,139		
	c Adjusted net income (if negative, enter -0-)				

Part II

Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1Cash—non-interest-bearing			
	2Savings and temporary cash investments	6,610,920	6,201,664	6,201,664
	3Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5Grants receivable			
	6Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8Inventories for sale or use			
	9Prepaid expenses and deferred charges			
	10aInvestments—U S and state government obligations (attach schedule)	530,355	524,707	522,947
	bInvestments—corporate stock (attach schedule)	3,915,034	3,374,566	10,967,626
	cInvestments—corporate bonds (attach schedule).	2,288,570	2,022,585	1,744,486
	11Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12Investments—mortgage loans			
	13Investments—other (attach schedule)	5,114,095	5,768,134	6,872,876
Liabilities	14Land, buildings, and equipment basis ▶ _____ 9,432 Less accumulated depreciation (attach schedule) ▶ 6,175	4,200	3,257	
	15Other assets (describe ▶ _____)		2	
	16Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	18,463,174	17,894,915	26,309,599
	17Accounts payable and accrued expenses		109	
	18Grants payable			
	19Deferred revenue			
	20Loans from officers, directors, trustees, and other disqualified persons			
Net Assets or Fund Balances	21Mortgages and other notes payable (attach schedule)			
	22Other liabilities (describe ▶ _____)			
	23Total liabilities (add lines 17 through 22)		109	
	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24Unrestricted			
	25Temporarily restricted			
	26Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27Capital stock, trust principal, or current funds			
	28Paid-in or capital surplus, or land, bldg , and equipment fund			
	29Retained earnings, accumulated income, endowment, or other funds	18,463,174	17,894,806	
	30Total net assets or fund balances (see page 17 of the instructions)	18,463,174	17,894,806	
	31Total liabilities and net assets/fund balances (see page 17 of the instructions)	18,463,174	17,894,915	

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	18,463,174
2	Enter amount from Part I, line 27a	2	-568,368
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	17,894,806
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	17,894,806

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)
1 a	Capital Gain Distribution-Vanguard	P	2001-01-01	2009-12-31
b	See Attached Statement	P	2001-01-01	2009-12-31
c	See Attached Statement	P	2009-01-01	2009-12-31
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 35			35
b 2,510,928		1,681,462	829,466
c 72,434		196,240	-123,806
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			35
b			829,466
c			-123,806
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	705,695
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	-123,806

Part V

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries			
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	2,158,372	29,075,620	0 07423
2007	2,368,389	33,701,697	0 07028
2006	2,064,207	31,899,964	0 06471
2005	2,206,582	31,496,788	0 07006
2004	2,106,684	32,458,917	0 06490

2	Total of line 1, column (d).	2	0 34418
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 06884
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.	4	23,758,066
5	Multiply line 4 by line 3.	5	1,635,386
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	12,101
7	Add lines 5 and 6.	7	1,647,487
8	Enter qualifying distributions from Part XII, line 4.	8	1,777,565

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)		
1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		112,101
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2
3 Add lines 1 and 2.		312,101
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		512,101
6 Credits/Payments		
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a26,400	
b Exempt foreign organizations—tax withheld at source	6b	
c Tax paid with application for extension of time to file (Form 8868)	6c	
d Backup withholding erroneously withheld	6d	
7 Total credits and payments Add lines 6a through 6d.		726,400
8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		1014,299
11 Enter the amount of line 10 to be Credited to 2010 estimated tax 14,299 Refunded		11

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

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 page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address  www.munsonfdn.org				
14	The books are in care of  Adwell Services LLC Telephone no  (217) 243-4397			
	Located at  102 N Westgate Avenue Jacksonville IL ZIP+4  62650			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here  ☐			
	and enter the amount of tax-exempt interest received or accrued during the year.		15	

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

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)?  ☐	1b		No
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		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?  Yes  No			
	If "Yes," list the years  20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions).  ☐	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here  20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  Yes  No			
b	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.</i>)  ☐	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

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

(1)

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

Yes

✓

No

(2)

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

Yes

✓

No

(3)

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

Yes

✓

No

(4)

Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions).

Yes

✓

No

(5)

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

Yes

✓

No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.

5b

No

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? If "Yes," attach the statement required by Regulations section 53.4945–5(d).

Yes

✓

No

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? If "Yes" to 6b, file Form 8870.

6b

No

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?

7b

No

Part VIII

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

1

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
H Alexander Henry	Treasurer	0		
1990 M Street Ste 250 Washington, DC 20036	0 00			
Bruce Reid	Secretary	0		
1990 M Street Ste 250 Washington, DC 20036	0 00			
C Wolcott Henry III	President	67,790	6,708	
1990 M Street Ste250 Washington, DC 20036	32 00			

2

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Angelica Braestrup	Grant Administr	89,000	8,852	
1990 M Street Washington, DC 20036	40 00			

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

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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 (see page 23 of the instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see page 23 of the instructions)

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

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	18,014,113
b	Average of monthly cash balances.	1b	6,105,751
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	24,119,864
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	
3	Subtract line 2 from line 1d.	3	24,119,864
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	361,798
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	23,758,066
6	Minimum investment return. Enter 5% of line 5.	6	1,187,903

Part XI

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

1	Minimum investment return from Part X, line 6.	1	1,187,903
2a	Tax on investment income for 2009 from Part VI, line 5.	2a	12,101
b	Income tax for 2009 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	12,101
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,175,802
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,175,802
6	Deduction from distributable amount (see page 25 of the instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	1,175,802

Part XII

Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	1,777,565
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,777,565
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	12,101
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,765,464
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			

Part XIII

Undistributed Income (see page 26 of the instructions)

		(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1		Distributable amount for 2009 from Part XI, line 7			
2		Undistributed income, if any, as of the end of 2008			
a		Enter amount for 2008 only.			
b		Total for prior years 20____, 20____, 20____			
3		Excess distributions carryover, if any, to 2009			
a		From 2004.			
b		From 2005.			
c		From 2006.			
d		From 2007.			
e		From 2008.			
f		Total of lines 3a through e.			
4		Qualifying distributions for 2009 from Part XII, line 4			
a		Applied to 2008, but not more than line 2a			
b		Applied to undistributed income of prior years (Election required—see page 26 of the instructions)			
c		Treated as distributions out of corpus (Election required—see page 26 of the instructions).			
d		Applied to 2009 distributable amount.			
e		Remaining amount distributed out of corpus			
5		Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)			
6		Enter the net total of each column as indicated below:			
a		Corpus Add lines 3f, 4c, and 4e Subtract line 5			
b		Prior years' undistributed income Subtract line 4b from line 2b.			
c		Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.			
d		Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions.			
e		Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions.			
f		Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010.			
7		Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions).			
8		Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions).			
9		Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a.			
10		Analysis of line 9			
a		Excess from 2005.			
b		Excess from 2006.			
c		Excess from 2007.			
d		Excess from 2008.			
e		Excess from 2009.			

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

1a

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

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the instructions.)

1

Information Regarding Foundation Managers:

a

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

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

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

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

a

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

b

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

c

Any submission deadlines

d

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

Part XV **Supplementary Information** (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Attached Listing Various Various, AL 36602	N/A	Public	See Attached Listing	1,516,614
Total			3a	1,516,614
b <i>Approved for future payment</i>				
Total			3b	

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion 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	634,908	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	705,695	
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). .				1,340,603	
13 Total. Add line 12, columns (b), (d), and (e). 13					1,340,603

[illegible]

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?		Yes	No
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash.	1a(1)		No
	(2) Other assets.	1a(2)		No
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
	(3) Rental of facilities, equipment, or other assets.	1b(3)		No
	(4) Reimbursement arrangements.	1b(4)		No
	(5) Loans or loan guarantees.	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
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

Sign Here

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

*****	2010-05-06	*****
Signature of officer or trustee	Date	Title

Paid Preparer's Use Only	Preparer's Signature  Michael C May CPA	Date	Check if self-employed 	Preparer's identifying number (see Signature on page 30 of the instructions)
	Firm's name (or yours if self-employed), address, and ZIP code	ADWELL SERVICES LLC		EIN 
		102 N WESTGATE AVE		Phone no (217) 243-4397
		JACKSONVILLE, IL 626501718		

TY 2009 Accounting Fees Schedule**Name:** The Curtis & Edith Munson Foundation**EIN:** 59-2235907**Software ID:** 09000047**Software Version:** 2009v1.3

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
accounting fees	6,407	3,204	0	3,204

TY 2009 Employee Compensation Explanation

Name: The Curtis & Edith Munson Foundation

EIN: 59-2235907

Software ID: 09000047

Software Version: 2009v1.3

Employee	Explanation
Angelica Braestrup	

TY 2009 Land, Etc. Schedule

Name: The Curtis & Edith Munson Foundation

EIN: 59-2235907

Software ID: 09000047

Software Version: 2009v1.3

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Furniture and Fixtures	9,432	6,175	3,257	

TY 2009 Other Assets Schedule

Name: The Curtis & Edith Munson Foundation

EIN: 59-2235907

Software ID: 09000047

Software Version: 2009v1.3

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Rounding		2	

TY 2009 Other Expenses Schedule**Name:** The Curtis & Edith Munson Foundation**EIN:** 59-2235907**Software ID:** 09000047**Software Version:** 2009v1.3

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TELEPHONE	4,282			4,282
Rental Expenses	34,328	17,164		17,164
POSTAGE	3,724			3,724
OFFICE EXPENSES	17,600			17,600
INSURANCE	10,066			10,066
DUES & SUBSCRIPTIONS	6,346			6,346

TY 2009 Other Professional Fees Schedule**Name:** The Curtis & Edith Munson Foundation**EIN:** 59-2235907**Software ID:** 09000047**Software Version:** 2009v1.3

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment Management Fees	18,604	18,604	0	0
Consultant Fees	2,977	0	0	2,977

TY 2009 Taxes Schedule

Name: The Curtis & Edith Munson Foundation

EIN: 59-2235907

Software ID: 09000047

Software Version: 2009v1.3

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Foreign Tax	6,981	6,981		
Excise Tax	42,076	42,076		



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CURTIS EDITH MUNSON FND CUST

Proceeds From Broker Transactions

This section reports your proceeds from sales during the year. We report all transactions on a trade-date basis, which is the date shown in the sale date column. The net proceeds are less commissions, transfer charges, and premiums.

We have adjusted tax costs for amortization of premium paid for the acquisition of municipal bonds through date of sale and for non-taxable dividends. Wash sales are reported with tax cost equal to proceeds. Disallowed losses from wash sales have been added to the tax cost of the repurchased securities. An asterisk symbol (*) next to the tax cost indicates that the tax cost has been adjusted for the current year's return of capital. However, we have not made adjustments to the cost basis of all partnerships.

Short term transactions

This category includes all assets held 12 months or less.

Description	Cusip	Number of shares exchanged	Acquisition Date	Sale date	Gross proceeds less commissions	Tax cost	Net gain or loss
SPDR GOLD TR GOLD SHS ETF	78463V107	1	08/14/08	01/31/09	\$43.58	\$41.35	\$2.23
SPDR GOLD TR GOLD SHS ETF	78463V107	1	10/28/08	01/31/09	\$29.06	\$25.24	\$3.82
SPDR GOLD TR GOLD SHS ETF	78463V107	1	08/14/08	02/28/09	\$39.91	\$35.23	\$4.68
SPDR GOLD TR GOLD SHS ETF	78463V107	1	10/28/08	02/28/09	\$26.60	\$21.49	\$5.11
SPDR GOLD TR GOLD SHS ETF	78463V107	1	10/28/08	03/31/09	\$26.30	\$20.89	\$5.41
SPDR GOLD TR GOLD SHS ETF	78463V107	1	03/19/09	03/31/09	\$39.44	\$40.28	\$-0.84
SPDR GOLD TR GOLD SHS ETF	78463V107	1	08/14/08	03/31/09	\$39.44	\$34.21	\$5.23
BORDERS GROUP INC	099709107	10000	05/15/08	04/27/09	\$19,599.49	\$65,942.00	\$-46,342.51
AMERICAN INTERNATIONAL GROUP INC	026874107	2000	05/27/08	04/27/09	\$2,764.93	\$73,520.00	\$-70,755.07
SPDR GOLD TR GOLD SHS ETF	78463V107	1	08/14/08	04/30/09	\$44.30	\$39.75	\$4.55
SPDR GOLD TR GOLD SHS ETF	78463V107	1	10/28/08	04/30/09	\$29.53	\$24.25	\$5.28
SPDR GOLD TR GOLD SHS ETF	78463V107	1	03/19/09	04/30/09	\$44.30	\$46.80	\$-2.50
SPDR GOLD TR GOLD SHS ETF	78463V107	1	04/02/09	04/30/09	\$29.53	\$29.54	\$-0.01
SPDR GOLD TR GOLD SHS ETF	78463V107	1	08/14/08	05/31/09	\$43.63	\$38.93	\$4.70
SPDR GOLD TR GOLD SHS ETF	78463V107	1	10/28/08	05/31/09	\$29.08	\$23.75	\$5.33
SPDR GOLD TR GOLD SHS ETF	78463V107	1	03/19/09	05/31/09	\$43.63	\$45.84	\$-2.21
SPDR GOLD TR GOLD SHS ETF	78463V107	1	04/02/09	05/31/09	\$29.08	\$28.93	\$0.15
SPDR GOLD TR GOLD SHS ETF	78463V107	1	10/28/08	06/30/09	\$29.07	\$22.46	\$6.61



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Short term transactions

This category includes all assets held 12 months or less.

Description	Cusip	Number of shares exchanged	Acquisition Date	Sale date	Gross proceeds less commissions	Tax cost	Net gain or loss
SPDR GOLD TR GOLD SHS ETF	78463V107	1	08/14/08	06/30/09	\$43.60	\$36.81	\$6.79
SPDR GOLD TR GOLD SHS ETF	78463V107	1	03/19/09	06/30/09	\$43.60	\$43.33	\$0.27
SPDR GOLD TR GOLD SHS ETF	78463V107	1	04/02/09	06/30/09	\$29.07	\$27.36	\$1.71
WELLS FARGO & CO (NEW)	949746101	600	10/23/08	07/28/09	\$14,627.62	\$18,076.50	\$-3,448.88
WELLS FARGO & CO (NEW)	949746101	400	10/23/08	07/28/09	\$9,752.27	\$12,051.00	\$-2,298.73
WELLS FARGO & CO (NEW)	949746101	1000	11/25/08	07/28/09	\$24,380.67	\$25,470.00	\$-1,089.33
SPDR GOLD TR GOLD SHS ETF	78463V107	1	04/02/09	07/31/09	\$29.15	\$28.31	\$0.84
SPDR GOLD TR GOLD SHS ETF	78463V107	1	03/19/09	07/31/09	\$43.72	\$44.83	\$-1.11
SPDR GOLD TR GOLD SHS ETF	78463V107	1	08/14/08	07/31/09	\$43.72	\$38.08	\$5.64
SPDR GOLD TR GOLD SHS ETF	78463V107	1	10/28/08	07/31/09	\$29.15	\$23.24	\$5.91
SPDR GOLD TR GOLD SHS ETF	78463V107	1	03/19/09	08/31/09	\$45.88	\$46.42	\$-0.54
SPDR GOLD TR GOLD SHS ETF	78463V107	1	04/02/09	08/31/09	\$30.59	\$29.31	\$1.28
SPDR GOLD TR GOLD SHS ETF	78463V107	1	10/28/08	08/31/09	\$30.59	\$24.06	\$6.53
SPDR GOLD TR GOLD SHS ETF	78463V107	1	03/19/09	09/30/09	\$50.74	\$49.05	\$1.69
SPDR GOLD TR GOLD SHS ETF	78463V107	1	04/02/09	09/30/09	\$33.83	\$30.97	\$2.86
SPDR GOLD TR GOLD SHS ETF	78463V107	1	10/28/08	09/30/09	\$33.83	\$25.43	\$8.40
SPDR GOLD TR GOLD SHS ETF	78463V107	1	03/19/09	10/31/09	\$48.47	\$44.54	\$3.93
SPDR GOLD TR GOLD SHS ETF	78463V107	1	04/02/09	10/31/09	\$32.31	\$28.12	\$4.19
SPDR GOLD TR GOLD SHS ETF	78463V107	1	04/02/09	11/30/09	\$34.65	\$28.81	\$5.84
SPDR GOLD TR GOLD SHS ETF	78463V107	1	03/19/09	11/30/09	\$51.97	\$45.63	\$6.34
SPDR GOLD TR GOLD SHS ETF	78463V107	1	03/19/09	12/31/09	\$52.34	\$41.40	\$10.94
SPDR GOLD TR GOLD SHS ETF	78463V107	1	04/02/09	12/31/09	\$34.89	\$26.14	\$8.75
Total short term gain/loss from sales:					\$72,433.56	\$196,240.28	\$-123,806.72



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CURTIS EDITH MUNSON FND CUST

Long term transactions

This category includes all assets held more than 12 months.

Description	Cusip	Number of shares exchanged	Acquisition Date	Sale date	Gross proceeds less commissions	Tax cost	Net gain or loss
FEDERAL NATIONAL MORTGAGE	31375TW38	31.56	01/01/65	01/26/09	\$31.56	\$31.56	\$0.00
FEDERAL NATIONAL MORTGAGE	31375TW38	30.25	01/01/65	01/31/09	\$30.25	\$30.25	\$0.00
FEDERAL NATIONAL MORTGAGE	31375TW38	30.07	01/01/65	02/28/09	\$30.07	\$30.07	\$0.00
SECTOR SPDR TR SHS BEN	81369Y605	3000	03/20/02	03/04/09	\$20,879.88	\$20,879.88	\$0.00
SECTOR SPDR TR SHS BEN	81369Y605	3000	03/12/02	03/06/09	\$17,699.90	\$85,563.42	\$-67,863.52
FEDERAL NATIONAL MORTGAGE	31375TW38	32.02	01/01/65	03/31/09	\$32.02	\$32.02	\$0.00
SECTOR SPDR TR SHS BEN	81369Y605	5250	11/28/01	04/02/09	\$49,139.72	\$137,708.67	\$-88,568.95
SECTOR SPDR TR SHS BEN	81369Y605	1540	03/20/02	04/02/09	\$14,414.32	\$42,351.70	\$-27,937.38
AMERICAN INTERNATIONAL GROUP INC	026874107	1250	03/04/99	04/27/09	\$1,728.08	\$75,789.91	\$-74,061.83
AMERICAN INTERNATIONAL GROUP INC	026874107	1000	02/26/08	04/27/09	\$1,382.46	\$50,287.60	\$-48,905.14
AMERICAN INTERNATIONAL GROUP INC	026874107	750	03/14/00	04/27/09	\$1,036.85	\$42,992.00	\$-41,955.15
FEDERAL NATIONAL MORTGAGE	31375TW38	29.11	01/01/65	04/30/09	\$29.11	\$29.11	\$0.00
ALLSTATE LIFE GLOBAL FDG SECD	02003MAA2	400000	09/20/06	05/29/09	\$400,000.00	\$400,000.00	\$0.00
FEDERAL NATIONAL MORTGAGE	31375TW38	581.78	01/01/65	05/31/09	\$581.78	\$645.02	\$-63.24
FEDERAL NATIONAL MORTGAGE	31375TW38	35.46	01/01/65	06/30/09	\$35.46	\$35.46	\$0.00
EMERSON ELECTRIC CO	291011104	1000	03/17/88	07/28/09	\$36,172.77	\$8,457.50	\$27,715.27
EMERSON ELECTRIC CO	291011104	800	02/22/88	07/28/09	\$28,938.22	\$6,890.00	\$22,048.22
EMERSON ELECTRIC CO	291011104	1200	02/22/88	07/28/09	\$43,407.32	\$10,365.00	\$33,042.32
EMERSON ELECTRIC CO	291011104	4000	03/08/88	07/28/09	\$144,691.07	\$35,167.00	\$109,524.07
DISNEY WALT CO	254687106	2000	09/07/88	07/28/09	\$52,379.85	\$10,374.76	\$42,005.09
DISNEY WALT CO	254687106	6000	10/19/88	07/28/09	\$157,139.55	\$32,675.55	\$124,464.00
AMERICAN EXPRESS CO	025816109	6000	01/11/88	07/28/09	\$164,358.57	\$38,361.25	\$125,997.32
3M CO	88579Y101	1500	05/23/90	07/28/09	\$104,355.76	\$29,769.75	\$74,586.01
AMERICAN EXPRESS CO	025816109	3000	02/10/88	07/28/09	\$82,179.28	\$19,775.86	\$62,403.42
3M CO	88579Y101	2000	02/01/91	07/28/09	\$139,141.02	\$40,572.00	\$98,569.02
ROCHE HLDG LTD SPONSORED ADR	771195104	8000	01/01/04	07/28/09	\$309,192.04	\$53,140.00	\$256,052.04



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Long term transactions

This category includes all assets held more than 12 months.

Description	Cusip	Number of shares exchanged	Acquisition Date	Sale date	Gross proceeds less commissions	Tax cost	Net gain or loss
ILLINOIS TOOL WORKS INC	452308109	6000	01/25/91	07/28/09	\$240,558.41	\$38,137.88	\$202,420.53
FEDERAL NATIONAL MORTGAGE	31375TW38	727.29	01/01/65	07/31/09	\$727.29	\$806.35	\$-79.06
SPDR GOLD TR GOLD SHS ETF	78463V107	1	08/14/08	08/31/09	\$45.88	\$39.43	\$6.45
FEDERAL NATIONAL MORTGAGE	31375TW38	26.61	01/01/65	08/31/09	\$26.61	\$26.61	\$0.00
CVS CORP NT	126650AU4	500000	02/27/07	09/15/09	\$500,000.00	\$500,000.00	\$0.00
FEDERAL NATIONAL MORTGAGE	31375TW38	28.55	01/01/65	09/30/09	\$28.55	\$28.55	\$0.00
SPDR GOLD TR GOLD SHS ETF	78463V107	1	08/14/08	09/30/09	\$50.74	\$41.66	\$9.08
FEDERAL NATIONAL MORTGAGE	31375TW38	30.5	01/01/65	10/31/09	\$30.50	\$30.50	\$0.00
SPDR GOLD TR GOLD SHS ETF	78463V107	1	08/14/08	10/31/09	\$48.47	\$37.83	\$10.64
SPDR GOLD TR GOLD SHS ETF	78463V107	1	10/28/08	10/31/09	\$32.31	\$23.08	\$9.23
SPDR GOLD TR GOLD SHS ETF	78463V107	1	10/28/08	11/30/09	\$34.65	\$23.66	\$10.99
SPDR GOLD TR GOLD SHS ETF	78463V107	1	08/14/08	11/30/09	\$51.97	\$38.76	\$13.21
FEDERAL NATIONAL MORTGAGE	31375TW38	165.9	01/01/65	11/30/09	\$165.90	\$183.93	\$-18.03
SPDR GOLD TR GOLD SHS ETF	78463V107	1	08/14/08	12/31/09	\$52.34	\$35.17	\$17.17
SPDR GOLD TR GOLD SHS ETF	78463V107	1	10/28/08	12/31/09	\$34.89	\$21.46	\$13.43
FEDERAL NATIONAL MORTGAGE	31375TW38	32.2	01/01/65	01/25/10	\$32.20	\$32.20	\$0.00
Total long term gain/loss from sales:					\$2,510,927.62	\$1,681,462.41	\$829,465.21

**THE CURTIS & EDITH MUNSON
FOUNDATION
2009 GRANTS PROGRAM**

Following is a summary of grants made under the environmental programs in 2009. Those programs include (in declining order of size) Marine/Fisheries Conservation, South Florida Environment, Alabama Environment, Population & Environment, and District of Columbia Environment. Some grants are made for projects that cover both Alabama and Florida. Please know that except where noted, all grants carry a 1:1 match requirement. The second year of a two-year grant is subject to approval of progress on goals and objectives by the Board prior to the release of second-year funds.

Alabama Dance Theatre **2009: \$1,000**
Post Office Box 11327 EIN 63-0949625
Montgomery, Alabama 36111
Special director's grant

Alabama Enviro. Council **2009: \$10,000**
2431 Second Avenue North EIN 23-7044787
Birmingham, Alabama 35203
Funding in support of refining the communication and outreach program

Alabama Forest Resources Center **2009: \$20,000**
8 St. Joseph Street, 2nd Floor EIN 63-0958673
Mobile, Alabama 36602
Second year of a two-year grant in support of the forest conservation program in Alabama

Alabama Giving **2009: \$1,000**
Post Office Box 530727 EIN 48-1266328
Birmingham, Alabama 35253
Funding in support of the outreach and education program

Alabama Rivers Alliance **2009: \$20,000**
2027 2nd Avenue North, Ste. A EIN 63-1186023
Birmingham, Alabama 35203
Funding in support of Alabama's river systems

Alabama Rivers Alliance **2009: \$10,000**
2027 2nd Avenue North, Ste. A EIN 63-1186023
Birmingham, Alabama 35203
Funding in support of the Tri-State Compact Workshop

Alabama Shakespeare Festival **2009: \$2,000**
1 Festival Drive EIN 63-0652734
Montgomery, Alabama 36117
Special director's grant

Alabama Wildlife Federation **2009: \$20,000**
3050 Lanark Road EIN 63-0496911
Millbrook, Alabama 36054
Third year of a three-year grant to support the outreach and education programs at the Lanark Center

Alabama Wildlife Federation **2009: \$2,000**
3050 Lanark Road EIN 63-0496911
Millbrook, Alabama 36054
Special director's grant

American Cancer Society **2009: \$1,500**
3054C McGehee Road EIN 64-0329009
Montgomery, Alabama 36111-2203
Special director's grant

American Red Cross of Central AL **2009: \$8,000**
5015 Woods Crossing EIN 63-0288804
Montgomery, Alabama 36106
Special director's grant

Anacostia Watershed Society **2009: \$10,000**
4302 Baltimore Avenue EIN 52-1666511
Bladensburg, Maryland 20710-1031
Second and final year funding in support of the programs of AHS

Apalachicola Riverkeeper **2009: \$15,000**
23 Avenue D EIN 59-3550426
Apalachicola, Florida 32320
Funding in support of the Apalachicola Bay watershed

**Arizona State University
Scholarship Fund** **2009: \$5,000**
Tempe, Arizona 85287 EIN 86-0138459
Funding in support of The Edith Cummings Munson Golf award

Billfish Foundation **2009: \$7,500**
2161 E. Commercial Blvd., 2nd Floor EIN 59-2694327
Ft. Lauderdale, Florida 33338
Second year of a three-year grant in support of youth education programs in the Gulf of Mexico

Billfish Foundation **2009: \$7,500**
2161 E. Commercial Blvd., 2nd Floor EIN 59-2694327
Ft. Lauderdale, Florida 33338
Third year of a three-year grant in support of youth education programs in the Gulf of Mexico

Birmingham Southern College **2009: \$25,000**
900 Arkadelphia Road EIN 63-0288811
Birmingham, Alabama 35254
Southern Environmental Center funding in support of the educational programs

Black Warrior Riverkeeper **2009: \$10,000**
712 37th Street South EIN 72-1537394
Birmingham, Alabama 35222
Funding in support of the Black Warrior River watershed

Blue Frontier Campaign **2009: \$10,000**
Post Office Box 19367 EIN 14-1861309
Washington, DC 20036-9367
Funding in support of the Blue Vision conference

Boynton Beach Community High School **2009: \$5,000**

4975 Park Ridge Blvd
Boynton Beach, Florida 33426
Funding in support of the Palm Beach Zoo environmental education program

Boys & Girls Clubs of Montgomery **2009: \$2,500**

Post Office Box 234 EIN 63-0302108
Montgomery, Alabama 36101-0234
Special director's grant

Buoniconti Fund to Cure Paralysis **2009: \$1,000**

Post Office Box 016960, R-48 EIN 65-0244316
Miami, Florida 33101
Special director's grant

Cahaba River Society **2009: \$20,000**

2717 7th Ave South, Ste 205 EIN 63-0987276
Birmingham, Alabama 35233-3421
Funding to support the promotion of water conservation and freshwater resource protection in the Cahaba River watershed and the greater Birmingham region

Camp Boggy Creek **2009: \$5,000**

30500 Brantley Branch Road EIN 59-3012889
Eustis, Florida 32736
Special director's grant

Central Alabama Laubach Literacy Council **2009: \$2,000**

EIN 63-1045923
2048 W Fairview Avenue
Montgomery, Alabama 36108-4198
Special director's grant

Chesapeake Bay Trust **2009: \$3,000**

60 West Street, Suite 405 EIN 52-1454182
Annapolis, Maryland 21401-2400
Funding in support of the Chesapeake Bay Funders Network

Children's Museum of Northern VA **2009: \$2,000**

11209 Lapham Drive EIN 90-0168625
Oakton, Virginia 22124
Special director's grant

Christ the King Episcopal Church **2009: \$3,000**

624 South McDonough Street
Montgomery, Alabama 36104
Special director's grant

Church of the Ascension **2009: \$5,000**

315 Clanton Avenue
Montgomery, Alabama 36104
Special director's grant

Clean Water Network of Florida **2009: \$25,000**

1229 N Duval Street
Tallahassee, Florida 32303
(Fiscal Agent Tides Center EIN 94-3213100) First year of a two-year grant to support the improvement of freshwater management in Florida

Conservation Alabama Found. **2009: \$10,000**

Post Office Box 130656 EIN 20-8420116
Birmingham, Alabama 35213-0656
Final year of funding to support the programs of the foundation

Consultative Group on Biodiversity **2009: \$12,500**

P O Box 29361 EIN 13-3431076
San Francisco, California 94129
Second year of a two-year grant for supporting and coordinating the activities of the Marine Funders Working Group

Coral Reef Alliance **2009: \$15,000**

417 Montgomery Street, Suite 205 EIN 94-3211245
San Francisco, California 94105
Funding in support of coral reef conservation

Donors Forum of South Florida **2009: \$1,000**

150 SE 2nd Avenue, Suite 700 EIN 59-2671778
Miami, Florida 33131
Funding to support collaborations and continuing professional training of south Florida grantmakers

E The Environmental Magazine **2009: \$10,000**

Post Office Box 5098 EIN 06-1246661
Westport, Connecticut 06881-5098
Funding in support of E Magazine's 20th anniversary and to upgrade its ability to meet the communications demands of the time

E The Environmental Magazine **2009: \$5,000**

Post Office Box 5098 EIN 06-1246661
Westport, Connecticut 06881-5098
Funding in support of Earth Talk

Earth Conservation Corps **2009: \$10,000**

2000 Half Street SW EIN 52-1683270
Washington, DC 20024
Second year of a three-year grant to support the work providing environmental education opportunities for at-risk youth in the DC area

Earth Echo International **2009: \$10,000**

888 16th Street NW Ste 800 EIN 95-4789334
Washington, DC 20006
Special director's grant

East Coast Exotic Animal Rescue **2009: \$7,500**

320 Zoo Road EIN 23-3055373
Fairfield, Pennsylvania 17350
Special director's grant

Environmental Film Festival 2009: \$5,000
1228 1/2 31st Street, NW EIN 83-0469770
Washington, DC 20007
First year of two-year grant in support of the 2009 and 2010 Film Festivals

Environmental Law Institute 2009: \$15,000
2000 L Street, NW EIN 52-0901863
Washington, DC 20036
Funding in support of the aquaculture certification project

Father Walter Child Care Center 2009: \$2,000
2815 Forbes Drive EIN 63-0422019
Montgomery, Alabama 36110
Special director's grant

Fauna and Flora International 2009: \$10,000
1720 N Street, NW EIN 04-2730954
Washington, DC 20036
Funding to support the development of marine protected area in the Caribbean

Federation for American Immigration Reform (FAIR) 2009: \$40,000
25 Massachusetts Ave., NW, Ste 330 EIN 52-1136126
Washington, DC 20001
Funding to support continuing efforts to provide education and outreach

Friends of the Earth 2009: \$1,000
1717 Massachusetts Ave., NW Ste 600 EIN 23-7420660
Washington, DC 20036-2083
Grant in honor of Brent Blackwelder and the 40th Anniversary of Friends of the Earth

Friends of Hurricane Creek 2009: \$15,000
Post Office Box 40836 EIN 32-0077772
Tuscaloosa, Alabama 35404
Funding in support of the Creekkeeper

Friends of Riverbend Park 2009: \$2,000
Post Office Box 1481 EIN 54-1966322
Great Falls, Virginia 22066-8481
Special director's grant

Friends of Rock Creek Environ. 2009: \$7,500
P O Box 42680 EIN 20-3874333
Washington, DC 20015
First year of two-year grant in support of a healthy and sustainable Rock Creek watershed

Georgetown Senior Center 2009: \$5,000
3127 P Street, NW EIN
Washington, DC 20008
Special director's grant

Goodwill Industries of Central AL 2008: \$2,000
Post Office Box 9349 EIN 63-0522335
Montgomery, Alabama 36108-0349
Special director's grant

Great Falls Charitable Found. 2009: \$10,000
Post Office Box 295 EIN 54-1791999
Great Falls, Virginia 22066
Special director's grant

Gulf Restoration Network 2009: \$15,000
Post Office Box 2245 EIN 72-1447742
New Orleans, Louisiana 70176-2245
Second year of a three-year grant in support of efforts in the Gulf of Mexico (particularly Alabama and Florida) promoting consideration of climate change effects in management plans for fisheries and possible offshore aquaculture production

Habitat for Humanity of Northern Virginia
4451 First Place South 2009: \$2,000
Arlington, Virginia 22204 EIN 91-1914868
Special director's grant

Homes for Our Troops 2009: \$3,000
37 Main Street EIN 54-2143612
Taunton, Massachusetts 02780
Special director's grant

IUCN 2009: \$25,000
1630 Connecticut Ave NW Ste 300 EIN 98-6000943
Washington, DC 20009-1053
Second year of a two-year grant in support of work on marine protected areas and the DC Marines network

Island Press 2009: \$25,000
1718 Connecticut Ave NW, Ste 300 EIN 94-2578166
Washington, DC 20009-1148
Funding in support of the marine resources publication program (\$20,000) and the mangrove book development project (\$5,000)

Land Trust Alliance 2009: 15,000
Post Office Box 3355 EIN 04-2751357
Raleigh, North Carolina 27636-3355
Second year of a two-year grant in support of building land trust sustainability in Florida and Alabama

Marine Conservation Biology Inst. 2009: \$15,000
2122 112th Avenue NE, Suite B-300 EIN 91-1725640
Bellevue, Washington 98004
Funding in support of continuing work on limiting bottom trawling and the work in marine protected areas

Marine Fish Conservation Network 2009: \$75,000
600 Pennsylvania Ave SE Ste 210 EIN 20-4254493
Washington, DC 20003
First year of two-year grant to support the work to implement the sustainable fisheries management policy at the federal level

Martin County Environmental Studies Center **2009: \$10,000**
EIN 53-07-014483-53C

2900 NE Indian River Drive
Jensen Beach, Florida 34957

Second year of a two-year grant in support of Camp Wet scholarships

Mesoamerican Reef Fund **2009: \$10,000**

17 Avenida "D" 0-19, Zona 15
Guatemala, Ciudad 01015

Second year of a three-year grant in support of the work of the Mesoamerican Reef Fund

Mobile Baykeeper **2009: \$20,000**

300 Dauphin St., Ste 200 EIN 63-1190615
Mobile, Alabama 36602

Funding to support the coastal programs of Mobile Baykeeper

Montgomery Academy **2009: \$16,000**

3240 Vaughn Road EIN 63-0401358
Montgomery, Alabama 36106

Special director's grant

Montgomery Area Food Bank **2009: \$1,000**

521 Trade Center Street EIN 63-0931846
Montgomery, Alabama 36108-2107

Special director's grant

Montgomery Area Nontraditional Equestrians (MANE) **2009: \$5,000**
EIN 58-2213532

3699 Wallahatchie Road
Pike Road, Alabama 36064

Special director's grant

Montgomery Humane Society **2009: \$1,000**

1150 John Overton Drive EIN 63-0351564
Montgomery, Alabama 36110

Special director's grant

Montgomery Museum of Fine Arts **2009: \$4,000**

Post Office Box 230819 EIN 63-6049847
Montgomery, Alabama 36123-0819

Special director's grant

National Aquarium in Baltimore **2009: \$10,000**

Pier 3 501 East Pratt Street EIN 52-1121163
Baltimore, Maryland 21202-3194

Funding in support of the Chesapeake Bay related restoration programs

Nat'l Aquarium in Washington, DC **2009: \$1,250**

Commerce Building, Room B-077 EIN 52-1243739
14th Street & Constitution Avenue, NW
Washington, DC 20230-0001

Funding in support of SeaQuest at the National Aquarium

Nat'l Aquarium in Washington, DC **2009: \$10,000**

Commerce Building, Room B-077 EIN 52-1243739
14th Street & Constitution Avenue, NW
Washington, DC 20230-0001

Continued funding to support the educational graphics and related materials

Nat'l Center for Missing & Exploited Children **2009: \$3,000**
EIN 52-1328557

699 Prince Street
Alexandria, Virginia 22314-3175

Special director's grant

National Coalition for Marine Conservation

4 Royal Street SE **2009: \$30,000**
Leesburg, Virginia 20175 EIN 58-1186029

Second year of a three-year grant to continue the work on big fish, menhaden issues, and, related marine conservation work

National Golf Coaches Association **2009: \$5,000**

5905 NW 54th Circle EIN 95-4075776
Coal Springs, Florida 33067

Funding in support of The Edith Cummings Munson golf award

National Parks Conservation Assoc. **2009: \$15,000**

1300 19th Street, NW, Suite 360 EIN 53-0225165
Washington, DC 20036

Second year of a two-year grant in support of the Sun Coast program with emphasis on Biscayne and Everglades National Parks

National Wildlife Federation **2009: \$12,500**

901 E Street, NW, Ste 400 EIN 53-0204616
Washington, DC 20010

Final funding for the Action Assistance program

Natural Resources Defense Council **2009: \$25,000**

40 West 20th Street EIN 13-2654926
New York, New York 10011

Second year of a three-year grant in support of the Florida Coasts and Ocean Coalition

New England Aquarium **2009: \$15,000**

Central Wharf EIN 04-2297514
Boston, Massachusetts 02110

Second year of a two-year grant in support of the Marine Conservation Action Fund.

Northwest Atlantic Marine Alliance **2009: \$7,500**

Post Office Box 360 EIN 01-0516646
Windham, Maine 04062

Funding in support of the IFQ research project

Ocean Conservancy **2009 \$30,000**

1300 19th Street, NW, Ste 800 EIN 23-7245152
Washington, DC 20036

Funding in support of fish conservation and advocacy work with the South Atlantic Fisheries Management Council

Planned Parenthood of Alabama 2009: \$15,000
 1211 South 27th Place EIN 63-0341404
 Birmingham, Alabama 35205-1806
Funding in support of the educational and outreach programs

Planned Parenthood of Greater Miami 2009: \$20,000
 2300 N Florida Mango EIN 59-1391115
 West Palm Beach, Florida 33409
Funding in support of the educational and outreach programs for 2008 and 2009

Planned Parenthood of Metro. DC 2009: \$20,000
 1108 16th Street, NW EIN 53-0204621
 Washington, DC 20036
Funding in support of the educational and outreach programs for 2008 and 2009

Potomac Riverkeeper 2009: \$25,000
 1717 Massachusetts Ave., NW, Ste 600 EIN 54-1982624
 Washington, DC 20036
Second year of a two-year grant in support of the keeper's activities

REEF 2009: \$20,000
 Post Office Box 246 EIN 65-0270064
 Key Largo, Florida 33037-0246
Funding in support of REEF's programs and the lionfish work in the Atlantic and Caribbean

Reef Relief 2009: \$10,000
 Post Office Box 430 EIN 59-2696402
 Key West, Florida 33041-0430
Funding in support of protection and conservation of coral reefs and related habitats in Florida

Renaissance, Inc. 2009: \$1,000
 215 Clayton Street EIN 63-1286067
 Montgomery, Alabama 36104-3431
Special director's grant

River Network 2009: \$30,000
 520 SW 6th Ave., Ste 1100 EIN 93-0969979
 Portland, Oregon 97204
Third year of a four-year grant in support of building the capacity of organizations in the Chesapeake Bay watershed

River Region United Way 2009: \$10,000
Alex de Tocqueville Society EIN 63-0330778
 Post Office Box 230005
 Montgomery, Alabama 36123-0005
Special director's grant

Ruffner Mountain Nature Ctr. 2009: \$15,000
 1214 South 81st Street EIN 63-0733391
 Birmingham, Alabama 35206
First year of two-year grant in support of Ruffner Mtn. Nature Center's programs

Sassafras River Assoc. 2009: \$10,000
 Post Office Box 333 EIN 84-1664388
 Georgetown, Maryland 21930-0333
Second and final year of a two-year grant in support of continued development of the Sassafras Riverkeeper program

SeaWeb 2009: \$30,000
 8401 Colesville Road, Ste 500 EIN 52-2156577
 Silver Spring, Maryland 20910
Second year of a two-year grant in support of continuing activities to educate the public, key audiences, and the media about issues of concern in ocean conservation

Second Nature, Inc. 2009: \$20,000
 14 Jersey Lane EIN 04-3195772
 Manchester, Massachusetts 01944
Funding in support of the Campaign for Environmental Literacy

Smart Coast, Inc. 2009: \$5,000
 Post Office Box 246 EIN 20-2312392
 Fairhope, Alabama 36533-0246
Final funding in support of improved coastal planning to include storm impact, transportation and ecosystem protection

Smart Coast, Inc. 2009: \$15,000
 Post Office Box 246 EIN 20-2312392
 Fairhope, Alabama 36533-0246
Second year of a two-year grant in support of efforts to improve coastal planning for development to include storm impact, transportation needs, and ecosystem service protection

Smithsonian Institution 2009: \$15,000
Museum of Natural History EIN 53-0206027
 Post Office Box 37012
 Washington, DC 20013-7012
Special director's grant

So Others Might Eat 2009: \$364
 71 O Street, NW EIN 23-7098123
 Washington, DC 20001
Special director's grant

Southern Environmental Law Center 2009: \$30,000
 201 West Main Street, Suite 14 EIN 52-1436778
 Charlottesville, Virginia 22902-5065
First year of a two-year grant in support of work in Alabama with an emphasis on water resource protection

Southern Environmental Law Center 2009: \$45,000
 201 West Main Street, Suite 14 EIN 52-1436778
 Charlottesville, Virginia 22902-5065
Second year of a two-year grant in support of work in Alabama with an emphasis on water resource protection

South River Federation 2009: \$5,000

2830 Solomons Island Rd, Ste B EIN 52-2301464

Edgewater, Maryland 21037

Second and final year of a two-year grant in support of issues affecting sustainability and environmental health in the South River watershed

SouthWings 2009: \$15,000

35 Haywood Street, Suite 201 EIN 62-1666910

Asheville, North Carolina 28801

Funding in support of the outreach, education and advocacy efforts in Alabama

Student Conservation Association 2009: \$15,000

1800 North Kent Street, Suite 102 EIN 91-0880684

Arlington, Virginia 22209

Funding in support of the Florida internship and leadership-training program

Student Conservation Association 2009: \$10,000

1800 North Kent Street, Suite 102 EIN 91-0880684

Arlington, Virginia 22209

Second year of a two-year grant in support of the DC internship and leadership-training program

Student Conservation Association 2009: \$1,000

1800 N Kent Street, Suite 102 EIN 91-0880684

Arlington, Virginia 22209

Memorial grant in memory of John Twiss, Jr

Surfrider Foundation 2009: \$22,000

Post Office Box 6010 EIN 95-3941826

San Clemente, California 92674-6010

Funding in support of the Florida programs (\$20,000) and for the international meeting (\$2,000)

Sustainable Develop. Institute 2009: \$5,000

3121 South Street, NW EIN 52-1899951

Washington, DC 20007

Funding in support of the Atlantic Coast Watch

The Nature Conservancy 2009: \$10,000

5410 Grosvenor Lane, Suite 100 EIN 53-0242652

Bethesda, Maryland 20814

Funding in support of the Virginia Coast Reserve program

The Nature Conservancy 2009: \$20,000

2100 1st Avenue North, Ste 500 EIN 53-0242652

Birmingham, Alabama 35203

Funding in support of the coastal programs of The Nature Conservancy of Alabama

The Ocean Foundation 2009: \$10,000

1990 M Street, NW, Ste 250 EIN 71-0863908

Washington, DC 20036

Special director's grant (\$5,000 Blue Legacy and \$5,000 the ocean fund)

The Ocean Foundation 2009: \$13,500

1990 M Street, NW, Ste 250 EIN 71-0863908

Washington, DC 20036

Funding in support of the Chesapeake Bay communications program (\$11,000) and the blue climate solutions communications program (\$2,500)

The Ocean Foundation 2009: \$25,000

1990 M Street, NW, Suite 250 EIN 71-0863908

Washington, DC 20036

Funding in support of The Ocean Project (\$6,000), The Coral Reef Fund (\$11,000), One Planet, One Ocean (\$4,000), and Marine Conservation Research Projects (\$4,000)

The Ocean Foundation 2009: \$42,000

1990 M Street, NW, Suite 250 EIN 71-0863908

Washington, DC 20036

Funding in support of The Ocean Project (\$35,000) and renewed funding for work with marine funders working group (\$7,000)

TransFair USA 2009: \$15,000

1500 Broadway, Suite 400

EIN 41-1848081

Oakland, California 94612

Funding in support of the work to identify sustainable sources and markets for aquaculture products in the United States

Trout Unlimited 2009: \$40,000

1500 Wilson Boulevard, Suite 310 EIN 38-1612715

Arlington, Virginia 22209

Second year of a two-year grant in support of the delivery of the Conservation Success Index to chapters working on the ground with natural resources agencies

University of Alabama 2009: \$12,000

College of Communication EIN 63-6001135

and Information Sciences

412 Reese Phifer Hall, Box 870172

Tuscaloosa, Alabama 35487-0172

Second year of a three-year grant to support the scholarship and internship program

University of Alabama 2009: \$1,000

General Fund EIN 63-6001135

G14 Rose Admin Bldg

Box 870101

Tuscaloosa, Alabama 35487-0101

Special director's grant

Washington Grantmakers 2009: \$500

1400 16th Street, NW, Suite 740 EIN 52-1756853

Washington, DC 20036

Support for the Leadership Fund Investment

Waterkeeper Alliance 2009: \$10,000

2 Kentbury Way EIN 13-4071318

Bethesda, Maryland 20814

Second year of a three-year grant in support of a Chesapeake Bay-wide stormwater pollution control strategy

Weeks Bay Foundation **2009: \$7,500**
11401 US Highway 98 EIN 63-1021925
Fairhope, Alabama 36532
Second and final year funding in support of the programs of the Weeks Bay Foundation

Wilderness Society **2009: \$10,000**
1615 M Street, NW EIN 53-0167933
Washington, DC 20036
Second year of a three year grant in support of the work in the southeast to promote grassroots support for the national wildlife refuges and related issues

1000 Friends of Florida **2009: \$30,000**
P O Box 5948 EIN 59-2761162
Tallahassee, Florida 32314-5948
Second year of a two-year grant in support of work to promote smart growth and sustainable development and to prevent destruction of fragile lands in Martin County

Total **2009: \$1,516,614**