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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

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27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)	0	23		Other expenses (attach so	chedule)		61				
27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)	ţ	24				inistrative	expenses.					
27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)	Ē	}		Add lines 13 throu	ugh 23							
27 Subtract line 26 from line 12 a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-)	ρe	25		Contributions, gift	ts, grants	paid		326,300		:	the second second	326,300
a Excess of revenue over expenses and disbursements -27,798 b Net investment income (if negative, enter -0-)	0	2€	<u> </u>	Total expenses and	disburse	ements. Add	lines 24 and 25	332,454			<u></u>	326,300
a Excess of revenue over expenses and disbursements -27,798 b Net investment income (if negative enter -0-)		27	,	Subtract line 26 fr	rom line	12		المناسبين المناسبين	37.	• ',`		
		Į	а	Excess of revenue	over expe	enses and d	isbursements	-27,798				
c Adjusted net income (if negative, enter -0-)			b	Net investment i	ncome ((if negative,	, enter -0-)		304	,656		
			С	Adjusted net inc	ome (if r	negative, ei	nter -0-) .	1. 7 4 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	F	,	286,738	,

Pa	rt II	Balance Sheets Attached schedules and amounts in the description column	Beginning of year	End o	of year
		should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash—non-interest-bearing	10,411	36,299	36,299
	2	Savings and temporary cash investments	6,435,212	6,288,345	6,288,345
	3	Accounts receivable		, , , , , ,	4.5
		Less. allowance for doubtful accounts			
	4	Pledges receivable	e	34	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
		Less allowance for doubtful accounts			
	5	Grants receivable .	<u> </u>		
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons (attach schedule) (see page 15 of the			
		instructions)			
	7	Other notes and loans receivable (attach schedule)			
ts		Less allowance for doubtful accounts			
Assets	8	Inventories for sale or use			
As	9	Prepaid expenses and deferred charges	5,863	2,770	2,770
	10 a	I Investments—U S and state government obligations (attach schedule)		96,841	
	l t	Investments—corporate stock (attach schedule)	139,863	90,238	
	0	Investments—corporate bonds (attach schedule)	27,757	76,815	
	11	Investments—land, buildings, and equipment basis	3. 3. 1. 3	· Francisco	
		Less accumulated depreciation (attach schedule)		* 	
	12	Investments—mortgage loans			
	13	investments—other (attach schedule) .			
	14	Land, buildings, and equipment basis	A STATE OF THE	4	4.44
	'-				
	15	Other assets (describe			
	1	`			
	16	Total assets (to be completed by all filers—see the	0.040.400	0.504.000	0.000.050
	47	instructions Also, see page 1, item I)	6,619,106	6,591,308	6,682,952
	17	Accounts payable and accrued expenses			الإسماد الإستان المواكمة
S	18	Grants payable			
Liabilities	19	Deferred revenue .			
豆	20	Loans from officers, directors, trustees, and other disqualified persons			
<u>.a</u>	21	Mortgages and other notes payable (attach schedule)			
_	22	Other liabilities (describe)			7. 1
	23	Total liabilities (add lines 17 through 22)	·		
		Foundations that follow SFAS 117, check here			2 2 2
es		and complete lines 24 through 26 and lines 30 and 31.			
unces	24	Unrestricted			1.
	25	Temporanly restricted			7
ä	26	Permanently restricted .			,
Net Assets or Fund Bala		Foundations that do not follow SFAS 117, check here			
٦	}	and complete lines 27 through 31.			²
ř	27	Capital stock, trust principal, or current funds			ļ.:
S	28	Paid-in or capital surplus, or land, bldg , and equipment fund	_		
ė	29	Retained earnings, accumulated income, endowment, or other funds	6,619,106	6,591,308	
155	30	Total net assets or fund balances (see page 17 of the	0,010,100	0,001,000	,
t A	"	instructions)	6,619,106	6,591,308	
Se	31	Total liabilities and net assets/fund balances (see page 17	0,019,100	0,001,000	٠,
_	3'		0.640.406	£ £04 200	•
D۵	rt III		6,619,106	6,591,308	
_		Analysis of Changes in Net Assets or Fund Balances	20 (
1		net assets or fund balances at beginning of year—Part II, column (a), line	SO (must agree with		6 640 400
_		f-year figure reported on prior year's return)		1	6,619,106
		· ·		2	-27,798
		nes 1, 2, and 3		4	6,591,308
		eases 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, c	olumn (b), line 30	6	6,591,308

(a) List and describe the	d Losses for Tax on Inverse kind(s) of property sold (e.g., real est e.e., or common stock, 200 shs MLC C	ate,	it Incor	(b) How acquired P—Purchase D—Donation	• •	e acquired day, yr)	(d) Date sold (mo , day, yτ)
1a 5000 Shs MPS Group				Р		7/15/1999	11/16/2009
b							
С							
d							
e							
(e) Gross sales price	(f) Depreciation allowed (or allowable)			other basis inse of sale		(h) Gain o (e) plus (f) r	• •
a 67,543				49,625			17,918
b							
С							
d							
e		L					
Complete only for assets show	ing gain in column (h) and owner	d by the	foundation	on on 12/31/69		(I) Gains (Col (I	n) gain minus
(i) F M ∨ as of 12/31/69	(j) Adjusted basis as of 12/31/69		(k) Exces	ss of col (i) (j), if any	C	ol (k), but not le Losses (fron	•
a							17,918
b							
С							
d							
е						` .	
2 Capital gain net income or	(net capital loss) { If gain, a			rt I, line 7	2		17,918
3 Net short-term capital gain							17,010
If gain, also enter in Part I,	line 8, column (c) (see pages	13 and	117 of	he }			
instructions). If (loss), enter					3		
Part V Qualification Und (For optional use by domestic p							
If section 4940(d)(2) applies, le Was the foundation liable for the If "Yes," the foundation does no	eave this part blank. ne section 4942 tax on the dis ot qualify under section 4940	stributal (e). Do	ole amo	unt of any year in plete this part.	the bas	e period?	
	ount in each column for each	year; s	ee page	18 of the instruc	tions be	rore making	any entries.
(a) Base penod years Calendar year (or tax year beginning in	(b) Adjusted qualifying distributio	ons I	Net value	(c) of nonchantable-use as	ssets		(d) ution ratio ided by col (c))
2008		7,000		6,738	560	(60) (6) (0 050011
2007		5,500		6,708			0.050008
2006		1,850		6,635		·····	0 050008
2005		7,117	· · · · · ·	6,033			0 060843
2004		4,355		5,328			0 060868
2 Total of line 1, column (d)						2	0.271738
3 Average distribution ratio for	r the 5-year base period—di	vide the	total or	line 2 by 5, or by	/ [
the number of years the fou	undation has been in existence	ce if les	s than 5	years	·	3	0.054348
4 Enter the net value of nonc	haritable-use assets for 2009	from P	art X, lii	ne 5	.	4	6,525,618
5 Multiply line 4 by line 3 .						5	354,654
6 Enter 1% of net investment	income (1% of Part I, line 27	' b)				6	3,047
7 Add lines 5 and 6						7	357,701
8 Enter qualifying distribution	s from Part XII, line 4 er than line 7, check the box					8 tusing a 1%	326,300 tax rate. See
the Part VI instructions on p		alt	• 1, III IC	o, and complete	anat pai	. doing a 170	

Pa	int VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of	of the ins	struct	ions)
	a Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1.)	. ,		
	Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)			
1	D Domestic foundations that meet the section 4940(e) requirements in Part V, check		6,093	
	here ▶ ☐ and enter 1% of Part I, line 27b	10 Sec. 15		, -
•	C All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4%		·	ļ:
	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-)			<u> </u>
3	Add lines 1 and 2		6,093	<u> </u>
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	2 5 7	<u>6,093</u>	<u> </u>
6	Credits/Payments:		-	G.M.
	a 2009 estimated tax payments and 2008 overpayment credited to 2009 6a 8,863		·1.	1.50
	b Exempt foreign organizations—tax withheld at source 6b			1
	c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 6d 6d	, \\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\		
7	Total credits and payments Add lines 6a through 6d		8,863	:
8	Enter any penalty for underpayment of estimated tax. Check here		0,00	'
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 10		2,770	<u> </u>
11	· · · · · · · · · · · · · · · · · · ·			1
Pa	irt VII-A Statements Regarding Activities		T	
	a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it		Yes	No
•	participate or intervene in any political campaign?	1a	+	X
1	b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the			
	instructions for definition)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials	Ţ.	-	1
	published or distributed by the foundation in connection with the activities	-	1 3.	'
	c Did the foundation file Form 1120-POL for this year?	. 1c		Х
	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	, i	1:\.	
	on foundation managers \$	<u> </u>		شنائد
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	. 2	 	X
_	If "Yes," attach a detailed description of the activities	.	-	1
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles	<u> </u>		:
_	of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	├	X
	a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	. 4a		X
	b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	+	N/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	. 5	╁.	X
6	If "Yes," attach the statement required by General Instruction T	٦.		1
U	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	-	1.	}
	that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part >		† ↑	
	a Enter the states to which the foundation reports or with which it is registered (see page 19 of the	`` <u> </u>	+^	┼
ا ب	instructions) FL	ł	1	1
1	b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney	•••	1	
•	General (or designate) of each state as required by General Instruction G? If "No," attach explanation	. 8b	x	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3)	. 35	 ^	†—
-	or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)?			1
	If "Yes," complete Part XIV	. 9		x
10				
	their names and addresses	10		X

-orm	990-PF (2009) Margaret & George Helow Family Foundation Inc 59-290	4267	P	age 5
Paŕ	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 page 20 of the instructions) .	11		×
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before			
	August 17, 2008?	12		<u> </u>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	_X_	
14	Website address ► N/A The books are in care of ► Joseph P. Helow Telephone no ► (904) 636-0	501		 -
14	The books are in care of Joseph P. Helow Located at Same Same ZIP+4 ZIP+4 ZIP+4 Joseph P. Helow ZIP+4 ZIP+4	291		
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 .		•	- Ш
Рa	rt VII-B Statements Regarding Activities for Which Form 4720 May Be Required			
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly)	<u> </u>	162	140
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? . Yes X No	7.		[, ,]
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)	;	١٠ ,	1 7 X
	a disqualified person? Yes X No	r		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1, 4	674 V1844	
		1.	1 4 3 3	
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	-		:
	for the benefit or use of a disqualified person)? Yes X No			<u> </u>
	(6) Agree to pay money or property to a government official? (Exception. Check "No"			4
	If the foundation agreed to make a grant to or to employ the official for a period	, ,	٠٠٠ ب	1
	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	,	\$ - -	, 1
	section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b	N/A	
	Organizations relying on a current notice regarding disaster assistance check here		;	7
C	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts,		<i></i>	
	that were not corrected before the first day of the tax year beginning in 2009?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
а	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d		: (¹ '	
	and 6e, Part XIII) for tax year(s) beginning before 2009?		~ ;	- 1
	If "Yes," list the years 20, 20, 20	'		1
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2)	1.		. :
	(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	N/A	
C	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here	,	**·	
o	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 X No	, ,,,	.~.	j
L				-
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			1
	If the foundation had excess business holdings in 2009.)	3b	N/A	ا ا
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
ь	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable	<u>"</u>		
-	numbers that not been removed from repeated before the first day of the tay year beginning in 20003	45		V

		Margaret & George Helow Fa								2904267	<u> </u>	Page 6
Pá	rt VII-B State	ements Regarding Activition	es f	or Which Forn	1 47	720 May Be R	equir	ed (continued)			
5a	During the year di	id the foundation pay or incur any	amo	ount to								
		opaganda, or otherwise attempt to						Yes	X N	o	, ,	l
	• •	e outcome of any specific public		•	955)	; or to carry			_		· .	'
	on, directly	or indirectly, any voter registration	ı driv	/e?				Yes	X N	o [``` "		1
	(3) Provide a gi	rant to an individual for travel, stu	dy, o	or other similar pur	pos	es? .		Yes	XN	o ``		
	(4) Provide a gr	rant to an organization other than	a ch	aritable, etc , orga	niza	ation described				- :	l •	1.
	in section 5	09(a)(1), (2), or (3), or section 494	10(d)	(2)? (see page 22	of t	he instructions)		Yes	XN	o 🗥		
	(5) Provide for	any purpose other than religious,	char	ritable, scientific, li	tera	ry, or				- }	ľ · .	1
	educational	purposes, or for the prevention o	f cru	elty to children or	anin	nals?		· Yes	XN	o	, ,	[; ;]
b	If any answer is "	Yes" to 5a(1)-(5), did any of the t	rans	actions fail to qual	ıfy u	inder the exception	ns des	scribed in				
	Regulations section	on 53.4945 or in a current notice	rega	rding disaster assi	star	nce (see page 22	of the	instructions)?		5b	N/A	
	Organizations rely	ying on a current notice regarding	dısa	ister assistance ch	neck	here		•	•		1	Γ.
С	If the answer is "Y	Yes" to question 5a(4), does the fo	ound	ation claim exemp	tion	from the				' .	. ~	1、'
	tax because it ma	intained expenditure responsibilit	y for	the grant? .				Yes	N	o Li	N/A	1
	If "Yes," attach th	e statement required by Regulation	ons s	section 53 4945–5	(d)					T F	1 24-	- ′
6a	Did the foundation	n, during the year, receive any fur	ıds, ı	directly or indirectl	y, to	pay						= 1
	premiums on a pe	ersonal benefit contract?						Yes	XN	0		
b	Did the foundation	n, during the year, pay premiums,	dire	ctly or indirectly, o	n a	personal benefit	contrac	zt?		6b		X
	If "Yes" to 6b, file	Form 8870						_		E 11	ļ .	
7a	At any time during	g the tax year, was the foundation	a pa	arty to a prohibited	tax	shelter transaction	on?	Yes	XN	o 🔄		1 0
b	If yes, did the four	ndation receive any proceeds or I	nave	any net income a	ttrib	utable to the trans	saction	?.		7b	N/A	
P	art VIII Inf	ormation About Officers,	Dir	ectors, Truste	es	, Foundation	Mana	gers, Highly	Paid (Employ	ees.	•
		d Contractors		·		•				• •	•	
1	List all officers	s, directors, trustees, founda	atio	n managers an	d th	eir compensat	ion (s	ee page 22 of	the ins	tructio	ns).	
			(b)	Title, and average	(c) Compensation		(d) Contributions to		(e) Exper		ount.
	(a) Nar	me and address		hours per week evoted to position	(1	If not paid, enter -0-)		nployee benefit plar deferred compensa		other a		
Sec	Statement 2 att	tached										
									1			
												
							L					
2		of five highest-paid employ	ees	(other than the	ose	included on li	ne 1–	-see page 23 o	of the ir	nstructi	ons).	
	If none, enter "	NONE.		<u> </u>		г		(d) Contabulana	42 1			
				(b) Title, and avera				(d) Contributions employee benef		(e) Expen	se acco	ount.
(a)	Name and address of	of each employee paid more than \$50,0	000	hours per week devoted to position		(c) Compensation	on	plans and deferre		other al		
				devoted to positio		 -		compensation	 -			
Nor	ie		-			}						
			_									
							İ		Ì			
				-								-
- -									- 1			
				 								
				1			1		}			
				· · · · · · · · · · · · · · · · · · ·		 	-+	 	 			
		•										
Tot	al number of oth	er employees paid over \$50,0	100	l		L						
100	ai number of our	iei eilipioyees palu ovei \$50,0	,00	<u> </u>	_ •	· · · · · ·	<u> </u>	· · · · · ·	<u>· · ·</u>			
										Form 99	40.PF	- (20)

Form 990-PF (2009) Margaret & George Helow Family Foundation Inc.		59-2904267	Page 7
Part VIII Information About Officers, Directors, Trustees, and Contractors (continued)	Foundation Managers, Highly Pai	d Employees	
3 Five highest-paid independent contractors for professional services (se	e page 23 of the instructions). If none, ent	er "NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compens	ation
NONE			
Total number of others receiving over \$50,000 for professional services	<u> </u>	•	
Part IX-A Summary of Direct Charitable Activities	N/A		
List the foundation's four largest direct charitable activities during the tax year. Include relevant the number of organizations and other beneficiaries served, conferences convened, research		Expense	es
1		 	
2			
3			
4			
Part IX-B Summary of Program-Related Investments (see pag	e 24 of the instructions) N/A		
Describe the two largest program-related investments made by the foundation during the tax years.	ear on lines 1 and 2	Amount	t
1			
2			<u>-</u>
All other program-related investments See page 24 of the instructions			
·····	•••••		
Total Add lines 1 through 3		 	

Form 990-PF (2009)

purposes a Average monthly fair market value of securities b Average of monthly cash balances c Fair market value of all other assets (see page 24 of the instructions) c Fair market value of all other assets (see page 24 of the instructions) c Fair market value of all other assets (see page 24 of the instructions) c Fair market value of all other assets (see page 24 of the instructions) c Fair market value of all other assets (see page 24 of the instructions) c Fair market value of all other assets (see page 25 of the instructions) c Acquisition indebtedness applicable to line 1 assets c 2 c Acquisition indebtedness applicable to line 1 assets c 2 c Subtract line 2 from line 1d c Cash deemed held for chantable activities Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions) of the instructions (see page 25 of the instructions) (Section 4942(i)(3) and (i)(5) private operating foundations and certain foreign organizations check here land on Part V, line 4 c Minimum investment return Enter 5% of line 5 c Market Value of noncharitable Amount (see page 25 of the instructions) (Section 4942(i)(3) and (i)(5) private operating foundations and certain foreign organizations check here land on one complete this part) I Minimum investment income for 2009 from Part VI, line 5 b Income tax for 2009 (This does not include the tax from Part VI) c Add lines 2a and 2b c Add lines 3 and 4 c Recoveries of amounts treated as qualifying distributions c Add lines 3 and 4 c Recoveries of amounts treated as qualifying distributions c Add lines 3 and 4 c Recoveries of amounts treated as qualifying distributions c Add lines 3 and 4 c Part XII Qualifying Distributions (see page 25 of the instructions) c Beduction from distributable amount (see page 25 of the instructions) c Beduction from distributable amount (see page 25 of the instructions) c Beduction from distributable amount searched and an acquired acquired as a side for sp	Pái	Minimum Investment Return (All domestic foundations must complete this part. Foreign	foundat	ions,
b Average monthly far market value of securities		see page 24 of the instructions.)	_	
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purposes Amounts set aside for specific charitable projects that satisfy the. a Suitability test (prior IRS approval required) b Cash distribution test (attach the required schedule) Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 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) Adjusted qualifying distributions. Subtract line 5 from line 4 2 3a 4 326,300	b	Program-related investments—total from Part IX-B	1b	
Amounts set aside for specific charitable projects that satisfy the. a Suitability test (prior IRS approval required) b Cash distribution test (attach the required schedule) 4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 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) 6 Adjusted qualifying distributions. Subtract line 5 from line 4 5 3a 3b 4 326,300	2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.,		
a Suitability test (prior IRS approval required) b Cash distribution test (attach the required schedule) 4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 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) 6 Adjusted qualifying distributions. Subtract line 5 from line 4 3a 4 326,300		purposes	2	
a Suitability test (prior IRS approval required) b Cash distribution test (attach the required schedule) 4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 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) 6 Adjusted qualifying distributions. Subtract line 5 from line 4 3a 4 326,300	3	Amounts set aside for specific charitable projects that satisfy the.		
b Cash distribution test (attach the required schedule) 4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 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) 6 Adjusted qualifying distributions. Subtract line 5 from line 4 3b 4 326,300	а		3a	
Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 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) Adjusted qualifying distributions. Subtract line 5 from line 4 4 326,300	b			
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). Adjusted qualifying distributions. Subtract line 5 from line 4	4			326.300
income Enter 1% of Part I, line 27b (see page 26 of the instructions) Adjusted qualifying distributions. Subtract line 5 from line 4	5			020,000
6 Adjusted qualifying distributions. Subtract line 5 from line 4			5	
	6	, , ,	$\overline{}$	326 300

1	Distributable amount for 2009 from Part XI,	(a) Corpus	(b) Years pnor to 2008	(c) 2008	(d) 2009
•	line 7		15 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -		320,188
2	Undistributed income, if any, as of the end of 2009	3		, 12 1, 22 , 11	320,100
а	Enter amount for 2008 only	1. 1. 1. 1.	1 1		-
b	Total for pnor years 20, 20, 20	.57		,, , , , , ,	. 1- 2
3	Excess distributions carryover, if any, to 2009	-		ana.	
а	From 2004				*
b	From 2005 .				7
С	From 2006 .	" " " " " " " " " " " " " " " " " " "	The state of the		· ,
d	From 2007			, , , , ,	
е	From 2008 337,000				
f .	Total of lines 3a through e	337,000	, , , , , , , , , , , , , , , , , , , ,	, , , , , , , , ,	7 1 1 7
4	Qualifying distributions for 2009 from Part	ق قرب		1.100	
	XII, line 4: ► \$ 326,300			17.	
	Applied to 2008, but not more than line 2a	for the	1 21		
D	Applied to undistributed income of prior years			F 1	(m) jug (1/2)
_	(Election required—see page 26 of the instructions)	·			- ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' '
C	Treated as distributions out of corpus (Election				
a	required—see page 26 of the instructions)	\$50 T	100 132-172	- 12 122 - 1	7.54.
	Applied to 2009 distributable amount .		The second of th	7,	7 7 7
5	Remaining amount distributed out of corpus Excess distributions carryover applied to 2009	326,300			227.000
•	(If an amount appears in column (d), the	337,000	A 3 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4	ζ.,	337,000
	same amount must be shown in column (a))		Section 1		
6	Enter the net total of each column as	(1) (1) (1) (1) (1) (1) (1) (1) (1) (1)	The state of the s		
	indicated below:	A. 15 25 4	3-2		
а	Corpus Add lines 3f, 4c, and 4e Subtract line 5	326,300			
	Prior years' undistributed income Subtract	5 - 5 - 5		1,2	
	line 4b from line 2b	4. 2. 2. 3. 6. 6. 6.			
С	Enter the amount of prior years' undistributed			1. 3 1. W. 1. 1	3.4
	income for which a notice of deficiency has	13 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		grade and another the	1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1
	been issued, or on which the section 4942(a)			The state of the s	
	tax has been previously assessed .				, , ,
d	Subtract line 6c from line 6b Taxable	3		The state of the state of	
	amount—see page 27 of the instructions .	4 3 14 3		9 <u>5 </u>	
е	Undistributed income for 2008 Subtract line	ا حقاً ال العاود مو			
	4a from line 2a. Taxable amount—see page 27 of the				** ***
	instructions .	, ,	4, 6		
f	Undistributed income for 2009. Subtract		1.24		
	lines 4d and 5 from line 1 This amount must		, ,	1.5	
_	be distributed in 2010	. 0, 1 1			· · · · · · · · · · · · · · · · · · ·
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	1		,	
	not applied on line 5 or line 7 (see page 27 of the			• • • • •	
^	instructions) .		· · · · · · · · · · · · · · · · · · ·		
9	Excess distributions carryover to 2010.	000.05	•		,
40	Subtract lines 7 and 8 from line 6a	326,300	<u> </u>		
10	Analysis of line 9:		,		` ,
a	Excess from 2005	i	•		,
D	Excess from 2006	- 1 pr	,		
C	Excess from 2007	4 7		-	-
d	Excess from 2008			,	, ,
<u> </u>	Excess from 2009		•		

Part XV Supplementary Information (continued)

October 2015 Appendix Project Continued Project Continu

Name and address (home or business) a Paid during the year See Statement 3 Total Approved for future payment Total Approved for future payment	Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount	
See Statement 3 Total		or substantial contributor	recipient	Contribution		
	a Paid during the year	O SUSSAMUAI CONTINUO			326,300	
	Total	<u> </u>		<u> </u>	326 300	
Total	b Approved for future payment					

Part XVI-A	Analysis	of Income	-Producing	Activ	ities

Enter gross amounts unless otherwise indicated.		Unrelated bus	iness income	Excluded by section	(e)	
1 Progra	TO SORVICE POVERIUM	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See page 28 of the instructions)
	m service revenue			+		are mstructions)
L .				1		
				1		
				 		
e						
ř —				 		
	es and contracts from government agencies			 		
_	ership dues and assessments			<u> </u>		
	st on savings and temporary cash investments			14	267,047	
	nds and interest from securities			14	19,691	
5 Net re	ntal income or (loss) from real estate	JA 7" " X 4 3		* **** * * * ***** * * *****	1. 1. 1.	
a De	bt-financed property					
b No	t debt-financed property					
6 Net re	ntal income or (loss) from personal property					
7 Other	investment income					
8 Gain c	r (loss) from sales of assets other than inventory			18	17,918	
9 Net in	come or (loss) from special events		l	<u> </u>		
	profit or (loss) from sales of inventory		· <u></u>			
11 Other	revenue a					
b						
c						<u> </u>
d				- 	· · · · · · · · · · · · · · · · · · ·	ļ
. e _		1 2 21 30		3 40 3 14° 1		ļ
	tal Add columns (b), (d), and (e)	- N F		1. A	304,656	
	Add line 12, columns (b), (d), and (e)	ulotiono \		•	13	304,656
	sheet in line 13 instructions on page 28 to verify calc		-6 F	·····		
_	Relationship of Activities to the Activities to the Activities to the Activity for which income				nodently to	
Line No. ▼	the accomplishment of the foundation's exempt					
•	page 28 of the instructions)	purposes (ourier the	in by providing in	unds for such purpo	303) (000	
		······································				·
			·			
						
	<u></u>					
						
						
						
						
				_		
						
				 		
			 -			
						
	<u> </u>					
	<u> </u>					

Formi 990-PF (2009) Margaret & George Helow Family Foundation Inc. 59-2904267 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations**

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?							7	Yes	No	
b	(1) Ca (2) Other t (1) Sa (2) Pu (3) Re (4) Re (5) Lo (6) Pe Sharin	transactions: les of assets to a non- rchases of assets fror ental of facilities, equip- imbursement arrange ans or loan guarantee erformance of services g of facilities, equipment	charitable exem a noncharitatement, or other ments are or membershent, mailing lis	empt organization able exempt organ r assets hip or fundraising sets, other assets, c	nization solicitations or paid employe	es			1a(1) 1a(2) 1b(1) 1b(2) 1b(3) 1b(4) 1b(5) 1b(6)		X X X X X X X X
d 	value o	inswer to any of the at of the goods, other ass in any transaction or s	sets, or servic	es given by the re	porting foundat	ion. If tl	he foundation red	ceived less that	ın fair n	narke	t d.
(a)	Line no	(b) Amount involved	(c) Name	of nonchantable exemp	t organization	(d) Des	scription of transfers, t	ransactions, and s	hanng an	ranger	ents
							· · · · · · · · · · · · · · · · · · ·				
_					·- ·- ·						
		· · · · · · · · · · · · · · · · · · ·									
						<u> </u>				-	
					· · · · · · · · · · · · · · · · · · ·						
	describ	foundation directly or i bed in section 501(c) o " complete the followi (a) Name of organization	of the Code (o	other than section			527?		Yes X] No	
				(2,7,7)	<u> </u>	·	(3, 200	<u>,</u>	<u> </u>		
_											
		er penalties of perjury, I declar, it is true, correct, and comp			laxpayer or fiduciary		on all information of		s any kno		
Here	Signature of officer or trustee			Date			Title				
Sign H	Paid Preparer's Use Only	Preparer's signature	Smill C	Tae CPA	Date 5/7/2010)	Check if self-employed	Preparer's number (se page 30 of P010268	e Signat the instru	ure on	
	ا يَ إِ	Firm's name (or yours if self-employed), address,	Donald A.	Toce, CPA, PA				EIN ► 26-12	209122		
		and ZIP code P.O. Box 54015, Jacksonville, FL 32245					Phone no (904) 710-3708				

FINANCIAL NEWS &

Daily Record

PROOF OF PUBLICATION

(Published Daily Except Saturday and Sunday) lacksonville, Duval County, Florida

STATE OF FLORIDA, COUNTY OF DUVAL,

Before the undersigned authority personally appeared James F. Bailey, Jr., who on oath says that he is the Publisher of FINANCIAL NEWS and DAILY RECORD, a daily (except Saturday and Sunday) newspaper published at Jacksonville, in Duval County, Florida; that the attached copy of advertisement, being a

Notice of Availability						
In the matter of Margaret & George Helow Family Foundation, Inc.						
in thein said newspaper in the issues of	Court, of Duval County, Florida, was published April 16, 2010					
at Jacksonville, in said Duval Cour	NANCIAL NEWS and DAILY RECORD is a newspaper nty, Florida, and that the said newspaper has heretofore d Duval County, Florida, each day (except Saturday and					

Sunday) and has been entered as second class matter at the post office in Jacksonville, in said Duval County, Florida, for a period of one year next preceding the first publication of the attached copy of advertisement; and affiant further says that he has neither paid nor promised any person, firm or corporation any discount, rebate, commission or refund for the purpose of securing this advertisement for publication in said newspaper.

> ublisher Sworn to and subscribed before me has day April 16, 2010

ANGELA CAMPBELL Notary Public, State of Florida My Comm. exp. April. 10, 2013 Comm. No. DD 858339

Angela Campbell Notary Public

DD858339

PRIVATE FOUNDATION'S ANNUAL REPORT FOR CALENDAR YEAR ENDED December 31, 2009

NOTICE OF AVAILABILITY OF

Notice is hereby given pursuant to the provisions of Section 6104(d) of the Internal Revenue Code that the Annual Report of

Margaret & George Helow Family Foundation, Inc. a private foundation, for its calendar year ended December 31, 2009 is available at its principal office for inspection during regular business hours by any citizen who requests it within 180 days after the date of publication of this notice The address of the Foundation is 8118 Summit Ridge Lane, Jacksonville, Florida 32256 and its principal manager 18 Joseph P. Helow.

Margaret & George Helow. Family Foundation, Inc Joseph P. Helow, President

00 (10-5450) Apr. 16

Margaret & George Helow Family Foundation

59-2904267 2009 Form 990 PF Statement #1 Part II Balance Sheet

	_	Of Year <u>Value</u>	End Of <u>Book V</u>	-	End O FN	
Line 10a - U.S. & State Gov. Obligations						
Guam Airport Authority		N/A	\$	47,778	\$	51,933
West Haven CT		N/A	\$	49,063	\$	49,470
Total Gov. Obligations			\$	96,841	\$	101,403
Line 10b Investments - Corporate Stock						
5,000 Shares Entertainment Prop.	\$	90,238	\$	90,238	\$	176,350
5,000 shares Modis	\$	49,625		N/A		N/A
Total Corporate Stock	\$	139,863	\$	90,238	\$	176,350
Line 10c Investments - Corporate Bonds						
Hartford Life Global		N/A	\$	49,058	\$	50,989
Unumprovident Corp.		27,757	\$	27,757	\$	26,796
Total Corporate Bonds	\$	27,757	\$	76,815	\$	77,785

59-2904267 Margaret & George Helow Family Foundation 8118 Summit Ridge Lane Jacksonville, FL 32256

2009 Form 990PF Statement 2 Part VIII

	<u>Title</u>	<u>Contribution</u>	Exp-A/C	Compensation
George A. Helow	Chairman/Director 2 hrs/wk	0	0	0
Margaret O. Helow	Secretary/Treasurer Director	0	0	0
Joseph P. Helow	President/Director 2 hrs/wk	0	0	0
Mary H. Pritchard	Director	0	0	0
Anne H. Darling	Director	0	0	0
Diane H. Parker	Director	0	0	0
Katherine H. Gilligan	Director	0	0	0
Theresa H Ryan	Director	0	0	0

Note:

Mailing Address for all Directors

8118 Summit Ridge Lane Jacksonville, FL 32256

59-2904267 Margaret & George Helow Family Foundation 8118 Summit Ridge Lane Jacksonville, FL 32256

2009 Form 990 PF Part XV Statement 3

	INDIVIDUAL	PURPOSE	<u> AN</u>	<u>IOUNT</u>
St. Vincent's Foundation 1800 Barrs Street Jacksonville, FL 32203	N/A	Charitable	\$	5,000
Journeys of Faith P.O. Box 845 Morrilton, AR 72110	N/A	Charitable	\$	5,000
Franciscan University of Steubenville 1235 University Blvd. Steubenville, Ohio 43952	N/A	Charitable	\$	5,000
Food For the Poor, Inc. 550 S.W. 12th Avenue Deerfield Beach, FL 33442	N/A	Charitable	\$	10,000
United Way of Northeast Florida P.O. Box 41428 Jacksonville, FL 32203-1428	N/A	Charitable	\$	10,000
The Guardian of Dreams 134 East Church Street Jacksonville, FL 32202	N/A	Charitable	\$	10,000
I M. Sulzbacher Center For the Homeless 611 East Adams Street Jacksonville, FL 32202	N/A	Charitable	\$	25,000
Franciscan Friars of the Renewal 1 Pryer Manor Road Larchmont, NY 10538	N/A	Charitable	\$	5,000
Holy Family Catholic Church 9800 Baymeadows Road Jacksonville, FL 32256	N/A	Charitable	\$	46,300
Eternal Word Television Network 5817 Old Leeds Road Irondale, AL 35210	N/A	Charitable	\$	10,000

Catholic Charities Bureau 134 East Church Street, #2 Jacksonville, FL 32202	N/A	Charitable	\$ 15,000
Bishop Snyder High School 5001 Samaritan Way Jacksonville, FL 32210	N/A	Charitable	\$ 10,000
FOCUS P.O. Box 1210 Greeley, CO 80632	N/A	Charitable	\$ 10,000
Apostolate For Family Consecration 3375 County Road 36 Bloomingdale, OH 43910	N/A	Charitable	\$ 5,000
Communita Cenacolo America, Inc. 24 Cathedral Place, #307 St. Augustine, FL 32084	N/A	Charitable	\$ 5,000
Thomas More Law Center 24 Frank Lloyd Wright Drive Ann Arbor, MI 48106	N/A	Charitable	\$ 5,000
St. Gerard House P.O. Box 4382 St. Augustine, FL. 32085	N/A	Charitable	\$ 5,000
Emergency Pregnancy Services 1555 Oak Street Jacksonville, FL 32204	N/A	Charitable	\$ 5,000
Diocese of St. Augustine 11625 Old St. Augustine Road Jacksonville, FL 32258	N/A	Charitable	\$ 100,000
Archdiocese for Military Services P.O. Box 29149 Washington, DC 20077-5210	N/A	Charitable	\$ 10,000
Mercy Ships P.O. Box 2020 Garden Valley, TX 75771	N/A	Charitable	\$ 5,000
Pilgrims Peace Center P.O. Box 1439 Crystal River, FL 34423-1439	N/A	Charitable	\$ 5,000
Sisters of Reparation P.O. Box 3 Steubenville, OH 43952	N/A	Charitable	\$ 5,000

St. Edward Catholic Church 441 North Temple Avenue Starke, FL 32091	N/A	Charitable	\$ 5,000
The Crudem Foundation P.O. Box 804 Ludlow, MA 01056	N/A	Charitable	\$ 5,000
Total			\$ 326,300