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## Return of Private Foundation

OMB No 1545-0052

2009

Department of the Treasury  
Internal Revenue Serviceor 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

For calendar year 2009, or tax year beginning

, and ending

G Check all that apply

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeUse the IRS  
label.  
Otherwise,  
print  
or type.  
See Specific  
Instructions.

Name of foundation

ROGERS FAMILY FOUNDATION, INC.

Number and street (or P.O. box number if mail is not delivered to street address)

215 N. JOANNA AVENUE

Room/suite

City or town, state, and ZIP code

TAVARES, FL 32778-2317

A Employer identification number

59-2969938

B Telephone number

352-343-2225

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundation

I Fair market value of all assets at end of year

(from Part II, col. (c), line 16)

▶ \$ 4,228,655. (Part I, column (d) must be on cash basis)

J Accounting method

☒ Cash☐ Accrual☐ Other (specify) \_\_\_\_\_

## Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

		(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			N/A	
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	17,661.	17,661.		STATEMENT 1
	4 Dividends and interest from securities	76,928.	76,928.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<1,055,549.>			
	b Gross sales price for all assets on line 6a	3,209,509.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income	11,811.	<511.>		STATEMENT 3	
12 Total. Add lines 1 through 11	<949,149.>	94,078.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees STMT 4	12,712.	6,356.		6,356.
	b Accounting fees STMT 5	4,235.	2,118.		2,117.
	c Other professional fees				
	17 Interest	97.	97.		0.
	18 Taxes STMT 6	9,532.	9,271.		261.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 7	18,540.	17,111.		1,429.
	24 Total operating and administrative expenses. Add lines 13 through 23	45,116.	34,953.		10,163.
	25 Contributions, gifts, grants paid	238,000.			238,000.
26 Total expenses and disbursements. Add lines 24 and 25	283,116.	34,953.		248,163.	
27 Subtract line 26 from line 12	<1,232,265.>				
a Excess of revenue over expenses and disbursements		59,125.			
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)			N/A		

**Part II Balance Sheets**

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing	385.	3,037.	3,037.
	2 Savings and temporary cash investments	343,530.	284,517.	285,560.
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations			
	b Investments - corporate stock STMT 9	1,234,639.	2,144,520.	2,236,522.
	c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis ▶ 182,017.				
Less accumulated depreciation ▶	182,017.	182,017.	182,017.	
12 Investments - mortgage loans				
13 Investments - other STMT 10	3,669,409.	1,563,402.	1,501,139.	
14 Land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶ STATEMENT 11)	0.	20,380.	20,380.	
16 Total assets (to be completed by all filers)	5,429,980.	4,197,873.	4,228,655.	
<b>Liabilities</b>	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31			
	27 Capital stock, trust principal, or current funds	5,429,980.	4,197,873.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
30 Total net assets or fund balances	5,429,980.	4,197,873.		
31 Total liabilities and net assets/fund balances	5,429,980.	4,197,873.		

**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	5,429,980.
2 Enter amount from Part I, line 27a	2	<1,232,265.>
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	158.
4 Add lines 1, 2, and 3	4	4,197,873.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,197,873.

**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.)
<b>1a</b>			
<b>b</b> SEE ATTACHED STATEMENT			
<b>c</b>			
<b>d</b>			
<b>e</b>			

  

(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)
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b> 3,209,509.		4,265,058.	<1,055,549.>

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			<1,055,549.>

  

<b>2</b> 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	<b>2</b>	<1,055,549.>
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8		<b>3</b>	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	152,872.	4,996,579.	.030595
2007	222,279.	4,768,125.	.046618
2006	228,188.	4,102,107.	.055627
2005	194,630.	3,927,074.	.049561
2004	157,137.	3,958,008.	.039701

  

<b>2</b> Total of line 1, column (d)	<b>2</b>	.222102
<b>3</b> 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	<b>3</b>	.044420
<b>4</b> Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	<b>4</b>	3,759,131.
<b>5</b> Multiply line 4 by line 3	<b>5</b>	166,981.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	591.
<b>7</b> Add lines 5 and 6	<b>7</b>	167,572.
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	248,163.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	591.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	591.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	591.
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	2,000.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	2,000.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,409.	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax <input checked="" type="checkbox"/> 800. Refunded <input checked="" type="checkbox"/>	11	609.	

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> NONE		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation		X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

SEE STATEMENT 12

**Part VII-A Statements Regarding Activities** (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► WILLIAM CAUTHEN Telephone no ► 352-343-2225 Located at ► 215 N. JOANNA AVENUE, TAVARES, FL ZIP+4 ► 32778			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15		N/A

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
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
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years ►		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)		3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
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

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**Part VII-B** Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

Organizations relying on a current notice regarding disaster assistance check here

☒**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870

6b

X

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
WILLIAM CAUTHEN 215 N. JOANNA AVENUE TAVARES, FL 32778	PRESIDENT 2.00	0.	0.	0.
HOWARD HEWITT 2928 PORTO BELLO AVENUE LEESBURG, FL 34748	SECRETARY, TREASURER 1.00	0.	0.	0.
PHIL BRAUN 3939 CR 48 OKAHUMPKA, FL 34762	VICE PRESIDENT 2.00	0.	0.	0.

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

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

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

0

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

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

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

0

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

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

	Expenses
1 N/A	
	0.
2	
3	
4	

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

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

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

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	3,468,142.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	348,235.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	3,816,377.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	3,816,377.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	57,246.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	3,759,131.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	187,957.

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

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	187,957.
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	591.
<b>b</b>	Income tax for 2009 (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	591.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	187,366.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	187,366.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	187,366.

**Part XII** Qualifying Distributions (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	248,163.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	248,163.
<b>5</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	<b>5</b>	591.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	247,572.

**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 instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
<b>1</b> Distributable amount for 2009 from Part XI, line 7				187,366.
<b>2</b> Undistributed income, if any, as of the end of 2009				
<b>a</b> Enter amount for 2008 only			236,448.	
<b>b</b> Total for prior years		0.		
<b>3</b> Excess distributions carryover, if any, to 2009				
<b>a</b> From 2004				
<b>b</b> From 2005				
<b>c</b> From 2006				
<b>d</b> From 2007				
<b>e</b> From 2008				
<b>f</b> Total of lines 3a through e	0.			
<b>4</b> Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 248,163.				
<b>a</b> Applied to 2008, but not more than line 2a			236,448.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2009 distributable amount				11,715.
<b>e</b> Remaining amount distributed out of corpus	0.			
<b>5</b> Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
<b>6</b> Enter the net total of each column as indicated below:	0.			
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b		0.		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
<b>d</b> Subtract line 6c from line 6b Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr			0.	
<b>f</b> Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				175,651.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
<b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
<b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2005				
<b>b</b> Excess from 2006				
<b>c</b> Excess from 2007				
<b>d</b> Excess from 2008				
<b>e</b> Excess from 2009				









ROGERS FAMILY FOUNDATION, INC.

**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	WACHOVIA/WELLS FARGO			
b	LPL FINANCIAL SERVICES			
c	MUTUAL SERVICE CORP/LPL			
d	WACHOVIA/WELLS FARGO			
e	LPL FINANCIAL SERVICES			
f	MUTUAL SERVICE CORP/LPL			
g	BERNSTEIN			
h	CAPITAL GAINS DIVIDENDS			
i				
j				
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	1,290,317.	1,294,170.	<3,853.>
b	1,363.	1,086.	277.
c	5,624.	12,696.	<7,072.>
d	836,279.	1,225,419.	<389,140.>
e	82,928.	112,619.	<29,691.>
f	246,925.	553,914.	<306,989.>
g	746,065.	1,065,154.	<319,089.>
h	8.		8.
i			
j			
k			
l			
m			
n			
o			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			<3,853.>
b			277.
c			<7,072.>
d			<389,140.>
e			<29,691.>
f			<306,989.>
g			<319,089.>
h			8.
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	<1,055,549.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8 }	3	N/A

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FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

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SOURCE	AMOUNT
BERNSTEIN	12.
E*TRADE	1.
MUTUAL SERVICE CORP/LPL	41.
PASSTHROUGH INTEREST - COLONIAL PINES APTS, LTD	2.
WACHOVIA/WELLS FARGO	17,605.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	17,661.

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FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
BERNSTEIN	6,060.	0.	6,060.
LPL FINANCIAL SERVICES	18,783.	0.	18,783.
MUTUAL SERVICE CORP/LPL	19,019.	8.	19,011.
WACHOVIA/WELLS FARGO	33,074.	0.	33,074.
TOTAL TO FM 990-PF, PART I, LN 4	76,936.	8.	76,928.

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FORM 990-PF OTHER INCOME STATEMENT 3

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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
REFUND OF EXCISE TAX ON INVESTMENT INCOME	12,290.	0.	
MISCELLANEOUS	32.	0.	
PASSTHROUGH NET RENTAL INCOME FROM COLONIAL PINES APTS, LTD	<511.>	<511.>	
TOTAL TO FORM 990-PF, PART I, LINE 11	11,811.	<511.>	



FORM 990-PF	LEGAL FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
LEGAL FEES	12,712.	6,356.		6,356.	
TO FM 990-PF, PG 1, LN 16A	12,712.	6,356.		6,356.	

FORM 990-PF	ACCOUNTING FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTING FEES	4,235.	2,118.		2,117.	
TO FORM 990-PF, PG 1, LN 16B	4,235.	2,118.		2,117.	

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
REAL ESTATE TAXES	8,536.	8,536.		0.	
ANNUAL REPORT FILING FEES	261.	0.		261.	
LICENSES	302.	302.		0.	
FOREIGN TAXES ON DIVIDENDS	433.	433.		0.	
TO FORM 990-PF, PG 1, LN 18	9,532.	9,271.		261.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INSURANCE	1,429.	0.		1,429.	
INVESTMENT FEES	12,709.	12,709.		0.	
MISCELLANEOUS	291.	291.		0.	
PASSTHROUGH SPECIAL DEPRECIATION FROM COLONIAL PINES APTS, LTD	4,111.	4,111.		0.	
TO FORM 990-PF, PG 1, LN 23	18,540.	17,111.		1,429.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	8
DESCRIPTION		AMOUNT	
NONDIVIDEND DISTRIBUTIONS FROM CORPORATE STOCK		158.	
TOTAL TO FORM 990-PF, PART III, LINE 3		158.	

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
550 SHS ABBOTT LABORATORIES	25,086.	29,695.	
650 SHS AFLAC INC	26,380.	30,063.	
500 SHS APACHE CORP	39,967.	51,585.	
250 SHS APPLE INC	36,754.	52,683.	
300 SHS COCA COLA CO	14,904.	17,100.	
250 SHS COLGATE PALMOLIVE CO	4,560.	20,538.	
675 SHS JOHNSON & JOHNSON	25,424.	43,477.	
3600 SHS OCCIDENTAL PETROLEUM CORP	21,078.	24,405.	
1700 SHS AT&T INC	42,521.	47,651.	
300 SHS BAKER HUGHES INC	25,096.	12,144.	
500 SHS BED BATH & BEYOND INC	17,688.	19,305.	
500 SHS BEST BUY CO INC	19,299.	19,730.	
525 SHS CHEVRON CORP	42,754.	40,420.	
1100 SHS CISCO SYSTEMS INC	24,369.	26,334.	
700 SHS CSX CORP	29,969.	33,943.	
700 SHS CVS CAREMARK CORP	26,879.	22,547.	
700 SHS DEERE & CO	31,742.	37,863.	
600 SHS DOMINION RES INC VA NEW	29,332.	23,352.	

500 SHS EDISON INTL	28,477.	17,390.
525 SHS EXXON MOBIL CORP	36,950.	35,800.
300 SHS FPL GROUP INC	16,406.	15,846.
350 SHS GENERAL MILLS INC	21,304.	24,784.
625 SHS GILEAD SCIENCES INC	27,616.	27,044.
200 SHS GOLDMAN SACHS GROUP INC	28,933.	33,768.
1000 SHS HALLIBURTON COMPANY	22,402.	30,090.
1050 SHS HEWLETT-PACKARD COMP	39,465.	54,086.
500 SHS ILLINOIS TOOL WORKS INC	20,486.	23,995.
1300 SHS INTEL CORP	24,517.	26,520.
350 SHS INTERNATIONAL BUSINESS MACHINE CORP	38,964.	45,815.
850 SHS JPMORGAN CHASE & CO	32,907.	35,420.
550 SHS KELLOGG COMPANY	28,361.	29,260.
300 SHS KIMBERLY-CLARK CORP	17,412.	19,113.
450 SHS LOCKHEED MARTIN CORP	35,414.	33,908.
500 SHS LOWES COMPANIES INC	9,964.	11,695.
550 SHS MCDONALDS CORP	31,430.	34,342.
600 SHS METLIFE INC	18,615.	21,210.
1100 SHS MICROSOFT CORP	25,834.	33,528.
500 SHS NIKE INC	26,687.	33,035.
900 SHS NORFOLK SOUTHERN CORP	38,974.	47,178.
525 SHS NORTHERN TRUST CORP	31,895.	27,510.
400 SHS NOVARTIS AG	18,127.	21,772.
1100 SHS ORACLE CORPORATION	23,677.	26,983.
300 SHS PEPSICO INCORPORATED	22,987.	18,240.
591 SHS PFIZER INCORPORATED	10,351.	10,750.
300 SHS PROCTER & GAMBLE CO	22,198.	18,189.
550 SHS S&P MIDCAP 400 INDEX	64,337.	72,457.
300 SHS SPDR TR UNIT SER	174,414.	181,090.
700 SHS STAPLES INC	15,329.	17,213.
600 SHS TARGET CORP	25,125.	29,022.
400 SHS TRANSOCEAN LTD	30,846.	33,120.
400 SHS UNITED TECHNOLOGIES CORP	22,067.	27,764.
750 SHS VANGUARD EUROPEAN ETF	34,252.	36,360.
500 SHS VANGUARD PACIFIC ETF	25,188.	25,660.
1000 SHS VERIZON COMMUNICATIONS	31,098.	33,130.
425 SHS WAL-MART STORES INC	21,530.	22,716.
1200 SHS WASTE MGMT INC DEL	34,982.	40,572.
20 SHS BERKSHIRE HATHAWAY INC	86,000.	65,720.
2615 SHS POWERSHARES QQQ TRUST	140,106.	119,636.
2695 SHS VANGUARD INDEX FUNDS GROWTH ETF	175,121.	142,997.
1685 SHS VANGUARD SPECIALIZED PORTFOLIOS DIVIDEND APPRECIATION ETF	79,970.	78,959.
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,144,520.	2,236,522.

FORM 990-PF

OTHER INVESTMENTS

STATEMENT 10

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
CAPITAL ONE CD 4.4% 1/18/11	COST	50,000.	51,516.
GE CAPITAL CD 4.45% 9/26/11	COST	50,000.	52,156.
GOLDMAN CD 4.5% 10/03/11	COST	50,000.	51,986.
850 WELLS FARGO 7\$ CAP IV	COST	9,351.	10,068.
WESTERN BANK CD 4% 01/13/11	COST	50,000.	51,348.
6548.615 SHS DWS ADVISORS FUNDS	COST		
SHORT DURATION PLUS FD		61,253.	61,950.
4134.818 SHS TEMPLETON FUNDS INCOME	COST		
TR GLB BD ADVISOR		50,583.	52,471.
1597.875 SHS VANGUARD TOTAL STOCK	COST		
MARKET INDEX FUND		39,754.	43,862.
3453.74 SHS VANGUARD INTL GROWTH FD	COST		
PORT		53,781.	58,679.
1717.739 SHS DODGE & COX INTL STOCK	COST	78,492.	54,710.
2005.348 SHS HUSSMAN INVT TR STRAT	COST		
GROWTH FD		30,000.	25,628.
14134.265 SHS LOOMIS SAYLES FDS I	COST		
BOND FD INSTL CL		196,312.	188,551.
4532.811 SHS VANGUARD WELLINGTON	COST		
FUND		142,460.	130,772.
8380.669 SHS VANGUARD BD INDEX FD	COST		
INC SHORT TERM PORTFOLIO		84,837.	87,327.
18638.553 SHS VANGUARD BD INDEX FD	COST		
INC INTER TERM PORTFOLIO FD		189,902.	199,805.
2881.297 SHS VANGUARD FIXED INCOME	COST		
SECS FD INC INFLATION PROTECTED		35,603.	36,160.
14249.652 SHS VANGUARD HIGH YIELD	COST		
CORP FUND		69,880.	77,946.
2539.235 SHS VANGUARD INDEX FUNDS	COST		
GROWTH PORTFOLIO		83,554.	69,372.
2225.136 SHS VANGUARD INDEX TR SML	COST		
CAP GROWTH PORTFOLIO INV		45,551.	37,449.
1388.993 SHS VANGUARD INTL EQTY	COST		
INDEX FD EMERGING MKTS STOCK INDEX		47,120.	35,989.
FD			
4116.803 SHS VANGUARD STAR FUND	COST		
TOTAL INTERNATIONAL STOCK INDEX		82,637.	59,323.
FUND			
6190.477 SHS VANGUARD TOTAL BD MRKT	COST		
INDEX FD		62,332.	64,071.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,563,402.	1,501,139.

FORM 990-PF	OTHER ASSETS		STATEMENT 11
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
COLONIAL PINES APTS GENERAL PARTNERSHIP INTEREST	0.	20,380.	20,380.
TO FORM 990-PF, PART II, LINE 15	0.	20,380.	20,380.

FORM 990-PF	EXPLANATION CONCERNING PART VII-A, LINE 8B	STATEMENT 12
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EXPLANATION

NOT REQUIRED BY THE STATE OF FLORIDA

FORM 990-PF

GRANTS AND CONTRIBUTIONS  
PAID DURING THE YEAR

STATEMENT 13

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
BOYS & GIRLS CLUB OF LAKE/SUMTER COUNTY 400 EXECUTIVE BLVD LEESBURG, FL 34748	N/A FACILITY REPAIR/EQUIPMENT	PUBLIC	40,000.
CHRISTIAN CARE FOUNDATION 115 N 13TH ST LEESBURG, FL 34748	N/A FACILITY CONSTRUCTION	PUBLIC	50,000.
COMMUNITY MEDICAL CARE CLINIC OF LEESBURG 1210 W. MAIN ST LEESBURG, FL 34748	N/A GENERAL SUPPORT	PUBLIC	7,500.
CORNERSTONE HOSPICE 12300 LANE PARK RD TAVARES, FL 32778	N/A GENERAL SUPPORT	PUBLIC	5,000.
FLORIDA SOUTHERN COLLEGE 111 LAKE HOLLINGSWORTH DR. LAKELAND, FL 33801	N/A GENERAL SUPPORT/TECHNOLOGY	PUBLIC	35,000.
LAKE SUMTER COMMUNITY COLLEGE FOUNDATION 9501 U.S. HIGHWAY 441 LEESBURG, FL 34748	N/A SCHOLARSHIPS	PUBLIC	7,500.
LAKE/SUMTER CHILDREN'S ADVOCACY CENTER 300 SOUTH CANAL ST LEESBURG, FL 34748	N/A GENERAL SUPPORT	PUBLIC	28,000.
LEESBURG FOOD BANK, INC. 1305 SUNSHINE AVE LEESBURG, FL 34748	N/A GENERAL SUPPORT	PUBLIC	30,000.

ROGERS FAMILY FOUNDATION, INC.

59-2969938

LEESBURG HUMANE SOCIETY 41250 EMERALDA ROAD LEESBURG, FL 34788	N/A GENERAL SUPPORT	PUBLIC	5,000.
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MORRISON UNITED METHODIST CHURCH 1005 W MAIN ST LEESBURG, FL 34748	N/A GENERAL SUPPORT	PUBLIC	5,000.
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SALVATION ARMY PO BOX 491265 LEESBURG, FL 34749	N/A GENERAL SUPPORT	PUBLIC	20,000.
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SUNRISE ARC 35201 RADIO ROAD LEESBURG, FL 34748	N/A GENERAL SUPPORT	PUBLIC	5,000.
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TOTAL TO FORM 990-PF, PART XV, LINE 3A

238,000.

FORM 990-PF

OTHER REVENUE

STATEMENT 14

DESCRIPTION	BUS CODE	UNRELATED BUSINESS INC	EXCL CODE	EXCLUDED AMOUNT	RELATED OR EXEMPT FUNC- TION INCOME
REFUND OF EXCISE TAX ON INVESTMENT INCOME			01	12,290.	
MISCELLANEOUS			01	32.	
PASSTHROUGH NET RENTAL INCOME FROM COLONIAL PINES APTS, LTD			16	<511.>	
TOTAL TO FORM 990-PF, PG 11, LN 11				11,811.	



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

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

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

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Type or print  File by the extended due date for filing the return. See instructions.	Name of Exempt Organization	Employer identification number
	ROGERS FAMILY FOUNDATION, INC.	59-2969938
	Number, street, and room or suite no. If a P O box, see instructions. 215 N. JOANNA AVENUE	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. TAVARES, FL 32778-2317	

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

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

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

WILLIAM CAUTHEN

- The books are in the care of ☒ 215 N. JOANNA AVENUE – TAVARES, FL 32778

Telephone No. ☒ 352-343-2225

FAX No. ☐

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

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

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

5 For calendar year 2009, or other tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_.

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

7 State in detail why you need the extension

**TAXPAYER REQUESTS ADDITIONAL TIME TO GATHER THE INFORMATION NECESSARY TO FILE A COMPLETE AND ACCURATE RETURN.**

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	1,890.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	2,000.
c <b>Balance Due.</b> Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

**Signature and Verification**

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

Signature ☒

Title ☒ CPA

Date ☒

Form 8868 (Rev 4-2009)