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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

OMB No 1545-0052

2009**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** , **2009, and ending** , **20****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

RAYMUND FOUNDATION, INC.

A Employer identification number

59-3447494

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

Room/suite

B Telephone number (see page 10 of the instructions)

5350 TECH DATA DRIVE

(727) 599-2630

City or town, state, and ZIP code

CLEARWATER, FL 33760

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) ☐ Accounting method ☒ Cash ☐ Accrual
☐ Other (specify) _____
(Part I, column (d) must be on cash basis)**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)

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)	186,475.			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B.				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	135,163.	135,163.		ATCH 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	-1,603,001.			
b Gross sales price for all assets on line 6a	1,328,856.			
7 Capital gain net income (from Part IV, line 2)				
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) (attach schedule)				
11 Other income (attach schedule)	-153.	-153.		ATCH 2
12 Total. Add lines 1 through 11	-1,281,516.	135,010.		
13 Compensation of officers, directors, trustees, etc.	0.			
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule)	15,108.	7,554.	0.	0.
c Other professional fees (attach schedule)				
17 Interest	13,036.	13,036.		
18 Taxes (attach schedule) (see page 14 of the instructions) *	4,265.	1,265.		
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)	39,591.	39,591.		
24 Total operating and administrative expenses. Add lines 13 through 23	72,000.	61,446.	0.	0.
25 Contributions, gifts, grants paid	424,455.			424,455.
26 Total expenses and disbursements. Add lines 24 and 25	496,455.	61,446.	0.	424,455.
27 Subtract line 26 from line 12	-1,777,971.			
a Excess of revenue over expenses and disbursements		73,564.		
b Net investment income (if negative, enter -0-)				
c Adjusted net income (if negative, enter -0-)			-0-	

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

JSA ** ATCH 5

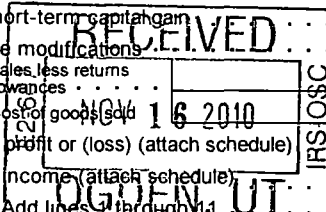
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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash - non-interest-bearing		1,926,588.	1,230,801.	1,230,801.
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶				
		Less allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)				
	7	Other notes and loans receivable (attach schedule) ▶				
		Less allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10 a	Investments - U S and state government obligations (attach schedule) *	567,460.	622,421.	627,702.	
	b	Investments - corporate stock (attach schedule) <u>ATCH 8</u>	7,260,833.	4,456,449.	3,611,365.	
	c	Investments - corporate bonds (attach schedule) <u>ATCH 9</u>	343,565.	2,035,353.	2,040,617.	
	Liabilities	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶				
12		Investments - mortgage loans				
13		Investments - other (attach schedule)				
14		Land, buildings, and equipment basis ▶				
		Less accumulated depreciation (attach schedule) ▶				
15		Other assets (describe ▶)				
16		Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	10,098,446.	8,345,024.	7,510,485.	
17		Accounts payable and accrued expenses				
18		Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶)				
23	Total liabilities (add lines 17 through 22)					
Net Assets or Fund Balances	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 and complete lines 27 through 31. <input checked="" type="checkbox"/> X					
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds	10,098,446.	8,345,024.		
	30	Total net assets or fund balances (see page 17 of the instructions)	10,098,446.	8,345,024.		
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	10,098,446.	8,345,024.			

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	10,098,446.
2	Enter amount from Part I, line 27a	2	-1,777,971.
3	Other increases not included in line 2 (itemize) ▶ <u>ATTACHMENT 10</u>	3	24,549.
4	Add lines 1, 2, and 3	4	8,345,024.
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	8,345,024.

** ATCH 7

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SEE PART IV SCHEDULE				
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

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))
(j) 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			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)		<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> <div style="margin: 0 10px;">}</div> </div>		2	-1,603,001.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)		<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;"> 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. </div> <div style="margin: 0 10px;">}</div> </div>		3	

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	444,666.	7,875,251.	0.056464
2007	523,021.	8,862,605.	0.059014
2006	347,843.	8,486,853.	0.040986
2005	485,930.	8,527,225.	0.056986
2004	372,539.	7,911,584.	0.047088

2 Total of line 1, column (d)	2	0.260538
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	0.052108
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	6,783,849.
5 Multiply line 4 by line 3	5	353,493.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	736.
7 Add lines 5 and 6	7	354,229.
8 Enter qualifying distributions from Part XII, line 4	8	424,455.

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 <input type="checkbox"/> and enter "N/A" on line 1			
Date of ruling or determination letter _____ (attach copy of ruling 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	736.
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		3	736.
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	736.
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	2,480.	
b Exempt foreign organizations-tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	0.	
d Backup withholding erroneously withheld	6d	8.	
7 Total credits and payments. Add lines 6a through 6d	7	2,488.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" 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	1,752.	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax <input type="checkbox"/> 760. Refunded <input type="checkbox"/>	11	992.	

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 page 19 of the instructions for definition)?		X
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		
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 type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?		X
If "Yes," attach a detailed description of the activities		
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?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		X
If "Yes," attach the statement required by General Instruction T		
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 page 19 of the instructions) <input type="checkbox"/> FLORIDA		
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 on page 27)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the 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?	13	X	
Website address <input type="checkbox"/> N/A				
14	The books are in care of <input type="checkbox"/> STEVEN A. RAYMUND Telephone no <input type="checkbox"/> (727) 599-2630			
	Located at <input type="checkbox"/> 5350 TECH DATA DRIVE, CLEARWATER, FL ZIP + 4 <input type="checkbox"/> 33760			
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? <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)?	1b	
Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
If "Yes," list the years <input type="checkbox"/>		
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	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <input type="checkbox"/>		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" 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	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (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)? **5b** ☒ Yes ☐ No
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? ☐ Yes ☐ No
If "Yes," attach the statement required by Regulations section 53.4945-5(d)

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ☐ Yes ☒ No
If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **7b** ☐ Yes ☒ 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
ATTACHMENT 11		0.	0.	0.

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
NONE				

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 NONE

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 NONE	
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 NONE	
2	
All other program-related investments See page 24 of the instructions	
3 NONE	
Total. Add lines 1 through 3	

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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	4,176,151.
b	Average of monthly cash balances	1b	2,711,005.
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	6,887,156.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	6,887,156.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	103,307.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	6,783,849.
6	Minimum investment return. Enter 5% of line 5	6	339,192.

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	339,192.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	736.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	736.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	338,456.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	338,456.
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	338,456.

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	424,455.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	0.
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	0.
b	Cash distribution test (attach the required schedule)	3b	0.
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	424,455.
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	736.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	423,719.

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				338,456.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only				
b Total for prior years 20 07, 20 06, 20 05				
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				67,623.
c From 2006				
d From 2007				110,049.
e From 2008				56,961.
f Total of lines 3a through e	234,633.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 424,455.				
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				338,456.
e Remaining amount distributed out of corpus	85,999.			
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	320,632.			
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	320,632.			
10 Analysis of line 9				
a Excess from 2005				67,623.
b Excess from 2006				
c Excess from 2007				110,049.
d Excess from 2008				56,961.
e Excess from 2009				85,999.

Form 990-PF (2009)

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

1 a 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 foundation is a private operating foundation described in section

4942(j)(3) or

4942(j)(5)

2 a 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 XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see page 28 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))

STEVEN A. RAYMUND

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

N/A

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

N/A

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

LETTER HIGHLIGHTING ACTIVITIES OF ORGANIZATION.

c Any submission deadlines

NONE

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

NONE

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

<div>Recipient</div> <div>Name and address (home or business)</div>	<div>If recipient is an individual, show any relationship to any foundation manager or substantial contributor</div>	<div>Foundation status of recipient</div>	<div>Purpose of grant or contribution</div>	<div>Amount</div>
a Paid during the year ATTACHMENT 12				
Total.			▶ 3a	424,455.
b Approved for future payment				
Total.			▶ 3b	

Form **990-PF** (2009)

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income	Excluded by section 512, 513, or 514		(e) Related or exempt function income (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	135,163.	
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			14	-153.	
8 Gain or (loss) from sales of assets other than inventory			18	-1,603,001.	
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)				-1,467,991.	
13 Total. Add line 12, columns (b), (d), and (e)				-1,467,991.	

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

[illegible]

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

- | | | Yes | No |
|----------|--|--------------|----|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of | | |
| | (1) Cash | 1a(1) | X |
| | (2) Other assets | 1a(2) | X |
| b | Other transactions | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

- b If "Yes," complete the following schedule**

[illegible]

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

Sign Here

Signature of officer or ~~postmaster~~

Date _____

Title

Preparer's
signature

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

PRICewaterhouseCOOPERS LLP

1441 BRICKELL AVENUE, SUITE 1100
MIAMI, FL 331

EIN ▶ 13-4008324

Phone no 305-375-7400

Form 990-PF (2009)

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2009

Name of the organization

RAYMUND FOUNDATION, INC.

Employer identification number

59-3447494

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 $\frac{1}{3}$ % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

For Privacy Act and Paperwork Reduction Act Notice, see the Instructions
for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization RAYMUND FOUNDATION, INC.

Employer identification number
59-3447494**Part I** Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	RAYMUND 2003 CHARITABLE LEAD TRUST 5350 TECH DATA DRIVE CLEARWATER, FL 33760	\$ 186,475.	Person <input checked="checked" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

SCHEDULE D
(Form 1041)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

► **Attach to Form 1041, Form 5227, or Form 990-T. See the instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).**

OMB No 1545-0092

2009

Name of estate or trust

RAYMUND FOUNDATION, INC.

Employer identification number

59-3447494

Note: Form 5227 filers need to complete *only* Parts I and II

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a					
b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b					1b 7,658.
2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824					2
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts					3
4 Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2008 Capital Loss Carryover Worksheet					4 ()
5 Net short-term gain or (loss). Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back					5 7,658.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a					
b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b					6b -1,610,964.
7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824					7
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts					8
9 Capital gain distributions					9 305.
10 Gain from Form 4797, Part I					10
11 Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2008 Capital Loss Carryover Worksheet					11 ()
12 Net long-term gain or (loss). Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back					12 -1,610,659.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2009

Part III Summary of Parts I and II		(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
Caution: Read the instructions before completing this part				
13	Net short-term gain or (loss)	13		7,658.
14	Net long-term gain or (loss):			
a	Total for year	14a		-1,610,659.
b	Unrecaptured section 1250 gain (see line 18 of the wrkshet)	14b		
c	28% rate gain	14c		
15	Total net gain or (loss). Combine lines 13 and 14a	15		-1,603,001.

Note: If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and do not complete Part IV. If line 15, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

Part IV Capital Loss Limitation	
16	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of a The loss on line 15, column (3) or b \$3,000
16	(3,000)

Note: If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** on page 7 of the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

Caution: Skip this part and complete the worksheet on page 8 of the instructions if

- Either line 14b, col (2) or line 14c, col (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero

Form 990-T trusts. Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col (2) or line 14c, col (2) is more than zero.

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34) . . .	17	
18	Enter the smaller of line 14a or 15 in column (2) but not less than zero	18	
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19	
20	Add lines 18 and 19	20	
21	If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0-	21	
22	Subtract line 21 from line 20. If zero or less, enter -0-	22	
23	Subtract line 22 from line 17. If zero or less, enter -0-	23	
24	Enter the smaller of the amount on line 17 or \$2,300	24	
25	Is the amount on line 23 equal to or more than the amount on line 24? <input type="checkbox"/> Yes. Skip lines 25 and 26, go to line 27 and check the "No" box <input type="checkbox"/> No. Enter the amount from line 23.	25	
26	Subtract line 25 from line 24.	26	
27	Are the amounts on lines 22 and 26 the same? <input type="checkbox"/> Yes. Skip lines 27 thru 30, go to line 31 <input type="checkbox"/> No. Enter the smaller of line 17 or line 22	27	
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)	28	
29	Subtract line 28 from line 27	29	
30	Multiply line 29 by 15% (15)	30	
31	Figure the tax on the amount on line 23. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	31	
32	Add lines 30 and 31	32	
33	Figure the tax on the amount on line 17. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	33	
34	Tax on all taxable income. Enter the smaller of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)	34	

Schedule D (Form 1041) 2009

**Continuation Sheet for Schedule D
(Form 1041)**

OMB No 1545-0092

2009

► See instructions for Schedule D (Form 1041).

▶ **Attach to Schedule D to list additional transactions for lines 1a and 6a.**

Name of estate or trust

Employer identification number

59-3447494

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

[illegible]

1b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 1b	7,658.
--	--------

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D-1 (Form 1041) 2009

Employer identification number

[illegible]

6b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 6b -1,610,964.

RAYMUND FOUNDATION, INC.

EIN: 59-3447494

GRANTS AND CONTRIBUTIONS PAID

Recipient	If recipient is an individual, show any relationship to foundation manager or substantial contributor	Foundation Status of Recipient	Purpose of grant or contribution	Amount
American Heart Association 2300 Centre Park West Drive, West Palm Beach, FL 33409	N/A	Public Charity	Support of Chantable programs	100 00
Amigos De Las Americas 5618 Star Lane, Houston, TX 77057	N/A	Public Charity	Support of Chantable programs	2,000 00
Big Brothers Big Sisters 918 West Bay Drive, Largo, FL 33770	N/A	Public Charity	Support of Chantable programs	200 00
CASA (Community Action Stops Abuse) P O Box 414, St Petersburg, FL 33731	N/A	Public Charity	Support of Chantable programs	150,000 00
Crime Stoppers of Pinellas County 10750 Ulmerton Rd, Largo, FL 33778	N/A	Public Charity	Support of Chantable programs	2,000 00
Development Corp for Israel Bond 12600 South Belcher Road, Suite 101A, Largo, FL 33773	N/A	Public Charity	Support of Chantable programs	130 00
Florida Holocaust Museum 55 5th Street South, St Petersburg, FL 33701	N/A	Public Charity	Support of Chantable programs	60,000 00
Gulf Coast Jewish Family Services 14041 Lot Blvd, Clearwater, FL 33760	N/A	Public Charity	Support of Chantable programs	100,000 00
Hadassah Foundation 5341 West Atlantic Avenue #305, Delray Beach, FL 33484	N/A	Public Charity	Support of Chantable programs	3,000 00
Institute of Student Achievement One Hollow Lane, Suite 100, Lake Success, New York 11042	N/A	Public Charity	Support of Chantable programs	10,000 00
Jewish Federation of Pinellas County 13191 Starkey Rd Ste 8, Largo, FL 33773	N/A	Public Charity	Support of Chantable programs	10,000 00
Jewish National Fund 42 E 69th St, New York, NY 10021	N/A	Public Charity	Support of Chantable programs	5,000 00
Moffitt Cancer Center Foundation 12902 Magnolia Drive, Tampa, FL 33612	N/A	Public Charity	Support of Chantable programs	18,000 00
Moffitt Cancer Center, Magnolia Ball 12902 Magnolia Drive, Tampa, FL 33612	N/A	Public Charity	Support of Chantable programs	10,000 00
Muscular Dystrophy Association 3450 East Fletcher Avenue #100, Tampa, FL 33613	N/A	Public Charity	Support of Chantable programs	100 00
National Multiple Sclerosis 2701 Maitland Ctr Pkwy, Ste 100, Orlando, FL 32751	N/A	Public Charity	Support of Chantable programs	100 00
Reach for the Rainbow 20 Torlake Crescent, Toronto, Ontario, M8Z 1B3	N/A	Public Charity	Support of Chantable programs	200 00
Shorecrest Preparatory School 5101 1st St NE, St Petersburg, FL 33703	N/A	Public Charity	Support of Chantable programs	17,400 00
Temple Bethel 400 Pasadena Avenue South, St. Petersburg, FL 33707	N/A	Public Charity	Support of Chantable programs	25,825 00
Tourette Syndrome Association (TSA) P O, Box 411416, Melbourne, FL 32941	N/A	Public Charity	Support of Chantable programs	100 00
United Way 5201 W Kennedy Blvd, Suite 600, Tampa, FL 33609	N/A	Public Charity	Support of Chantable programs	10,000 00
WES Easter Endowment Fund 1424 Paces Ferry Rd, Atlanta, GA 30327	N/A	Public Charity	Support of Chantable programs	100 00
WESCO International Chantable Foundation 225 West Station Square Drive, Pittsburgh, PA 15219	N/A	Public Charity	Support of Chantable programs	200 00
TOTAL				424,455.00

- 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 RAYMUND FOUNDATION, INC.	Employer identification number 59-3447494
	Number, street, and room or suite no. If a P.O. box, see instructions. 5350 TECH DATA DRIVE	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. CLEARWATER, FL 33760	

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

<input type="checkbox"/> Form 990	<input checked="" type="checkbox"/> Form 990-PF	<input type="checkbox"/> Form 1041-A	<input type="checkbox"/> Form 6069
<input type="checkbox"/> Form 990-BL	<input type="checkbox"/> Form 990-T (sec 401(a) or 408(a) trust)	<input type="checkbox"/> Form 4720	<input type="checkbox"/> Form 8870
<input type="checkbox"/> Form 990-EZ	<input type="checkbox"/> Form 990-T (trust other than above)	<input type="checkbox"/> Form 5227	

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

- The books are in the care of **STEVEN A. RAYMUND**
Telephone No. **727 599-2630** 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

- I request an additional 3-month extension of time until **11/15/2010**
- For calendar year **2009**, or other tax year beginning _____, and ending _____
- If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period
- State in detail why you need the extension **THE TAXPAYER RESPECTFULLY REQUESTS ADDITIONAL TIME TO GATHER THIRD PARTY INFORMATION NECESSARY TO COMPLETE AN 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 \$	796.
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 \$	2,480.
c Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c \$	0.

Signature and Verification

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

Signature **Amos P. Shipley** Title **ENROLLED AGENT** Date **8/11/2010**
 PRICEWATERHOUSECOOPERS LLP
 1441 BRICKELL AVENUE, SUITE 1100
 MIAMI, FL 33131-3429

Form 8868 (Rev 4-2009)

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
 - If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).
- Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ☐

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

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

Type or print File by the due date for filing your return. See instructions.	Name of Exempt Organization RAYMUND FOUNDATION, INC.	Employer identification number 59-3447494
	Number, street, and room or suite no. If a P.O. box, see instructions. 5350 TECH DATA DRIVE	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. CLEARWATER, FL 33760	

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

<input type="checkbox"/> Form 990	<input type="checkbox"/> Form 990-T (corporation)	<input type="checkbox"/> Form 4720
<input type="checkbox"/> Form 990-BL	<input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust)	<input type="checkbox"/> Form 5227
<input type="checkbox"/> Form 990-EZ	<input type="checkbox"/> Form 990-T (trust other than above)	<input type="checkbox"/> Form 6069
<input checked="" type="checkbox"/> Form 990-PF	<input type="checkbox"/> Form 1041-A	<input type="checkbox"/> Form 8870

- The books are in the care of ► **STEVEN A. RAYMUND**

Telephone No. ► **727 599-2630**

FAX No. ► _____

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

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 08/15, 2010 to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- ☒ calendar year 2009 or
- ☐ tax year beginning _____, and ending _____

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a \$	796.
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b \$	2,480.
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c \$	0.

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

For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

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

FORM 990-PF - PART IV CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Property		Description				P or D	Date acquired	Date sold
Gross price less expenses of sale	Depreciation allowed/allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		TOTAL CAPITAL GAIN DISTRIBUTIONS					305.	
913,218.		SUNTRUST BANK - SEE STATEMENT A PROPERTY TYPE: SECURITIES 2,052,804.				P	VARIOUS	VARIOUS
							-1139586.	
		AMA MULTI-STRAT - ST PROPERTY TYPE: SECURITIES				P	VARIOUS	VARIOUS
							11,245.	
		AMA MULTI-STRAT - LT PROPERTY TYPE: SECURITIES				P	VARIOUS	VARIOUS
							-45,589.	
		MULTI-STRATEGY SLV - ST PROPERTY TYPE: SECURITIES				P	VARIOUS	VARIOUS
							-3,582.	
		MULTI-STRATEGY SLV - LT PROPERTY TYPE: SECURITIES				P	VARIOUS	VARIOUS
							1,317.	
49,944.		SUNTRUST BANK ST - SEE STATEMENT B PROPERTY TYPE: SECURITIES 49,949.				P	VARIOUS	VARIOUS
							-5.	
365,694.		SUNTRUST BANK LT - SEE STATEMENT B PROPERTY TYPE: SECURITIES 413,302.				P	VARIOUS	VARIOUS
							-47,608.	
		STANFIELD MODENA PROPERTY TYPE: SECURITIES 379,498.				P	VARIOUS	VARIOUS
							-379,498.	
TOTAL GAIN (LOSS)							<u>-1603001.</u>	

ACCT 2TTR 5308905
FROM 01/01/2009
TO 12/31/2009

SUNTRUST BANK
STATEMENT OF CAPITAL GAINS AND LOSSES
RAYMUND FOUNDATION, INC TUA

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TRUST YEAR ENDING 12/31/2009

TAX PREPARER 21
TRUST ADMINISTRATOR 1060
INVESTMENT OFFICER 397

LEGEND F - FEDERAL S - STATE I - INHERITED
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	TERM
28541.8650 HARRIS ASSOC INV TR		OAKMARK INTL FUND - 413838202 - MINOR = 54				
SOLD		04/23/2009	327946 03			
ACQ	13303 7700	08/01/2005	152860 32	300000 00	-147139 68	LT15
	15238 0950	02/23/2007	175085.71	400000.00	-224914 29	LT15
21143.2370 HARRIS ASSOC INVT TR		OAKMARK INTERNATIONAL SMALL - 413838509 - MINOR = 54				
SOLD		04/23/2009	154345 63			
ACQ	9095 0440	08/01/2005	66393 82	200000 00	-133606 18	LT15
	12048 1930	02/22/2007	87951 81	290000 00	-202048.19	LT15
5000 0000 BAC CAP TR II GTD CAP		PPD 7 00% - 055188205 - MINOR = 46				
SOLD		05/14/2009	77500 00			
ACQ	5000 0000	02/10/2005	77500.00	131753 85	-54253 85	LT15
6000 0000 CITIGROUP CAP XI PFD		- 17307Q205 - MINOR = 46				
SOLD		05/14/2009	72955 12			
ACQ	6000 0000	01/18/2005	72955.12	150003 85	-77048 73	LT15
4500 0000 COUNTRYWIDE CAP IV PFD		- 22238E206 - MINOR = 46				
SOLD		05/14/2009	63752 55			
ACQ	2500.0000	03/18/2005	35418.08	64378 85	-28960 77	LT15
	2000 0000	03/23/2005	28334.47	50843 85	-22509 38	LT15
4500 0000 COUSINS PPTYS INC PFD		7 50% SER B - 222795403 - MINOR = 46				
SOLD		05/14/2009	69208 21			
ACQ	2500.0000	03/18/2005	38449 01	63878.85	-25429 84	LT15
	700 0000	03/22/2005	10765 72	17643 85	-6878 13	LT15
	1300 0000	03/23/2005	19993 48	32633 85	-12640 37	LT15
4000 0000 DEVELOPERS DIVERSIFIED		RLTY CORP - 251591780 - MINOR = 46				
SOLD		05/14/2009	39328 98			
ACQ	1100 0000	03/29/2005	10815.47	27943 85	-17128 38	LT15
	2900 0000	03/30/2005	28513 51	73083 85	-44570 34	LT15
5500 0000 ING GROEP NV PERPETUAL		DEBT SECS - 456837202 - MINOR = 47				
SOLD		05/14/2009	75558 15			
ACQ	4000.0000	02/08/2005	54951 38	107923 85	-52972 47	LT15
	1500 0000	02/11/2005	20606 77	40353 85	-19747 08	LT15
7000.0000 NUVEEN PFD & CONV INCOME FD COM		- 67073B106 - MINOR = 60				
SOLD		05/14/2009	32623.35			
ACQ	7000 0000	01/01/2003	32623 35	102362 05	-69738 70	LT15
TOTALS			913218 02	2052804 40		

SUMMARY OF CAPITAL GAINS/LOSSES

FEDERAL	SHORT TERM	LONG TERM 28%	LONG TERM 15%	ST WASH SALE	LT WASH SALE	1250 GAIN
SUBTOTAL FROM ABOVE	0 00	0.00	-1139586 38	0 00	0 00	0 00
COMMON TRUST FUND	0 00	0 00	0 00			0 00
CAPITAL GAIN DIVIDENDS	0 00	0 00	303 97			0 00
	0 00	0 00	-1139282 41	0 00	0 00	0 00

ACCT 2TTR 7919615
FROM 01/01/2009
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SUNTRUST BANK
STATEMENT OF CAPITAL GAINS AND LOSSES
RAYMUND FOUNDATION WASMER/SCHROEDER

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TRUST YEAR ENDING 12/31/2009

TAX PREPARER: 21
TRUST ADMINISTRATOR 1060
INVESTMENT OFFICER 275

LEGEND: F - FEDERAL S - STATE I - INHERITED
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	TERM
25000 0000 KEYCORP		6 500 5/14/13 - 49326EEB5 - MINOR = 30				
SOLD		02/19/2009	24750 00			
ACQ	25000.0000	05/14/2008	24750.00	24821 75	-71 75	ST
400 0000 CITIGROUP CAPITAL XVI		- 17310L201 - MINOR = 46				
SOLD		03/06/2009	2050 38			
ACQ	200 0000	03/07/2007	1025 19	5090 00	-4064 81	LT15
	200 0000	04/09/2007	1025 19	5070 00	-4044.81	LT15
25000 0000 MARQUETTE MICH		5 250 11/01/14 - 571494DU4 - MINOR = 39				
SOLD		04/15/2009	23962.50			
ACQ	25000 0000	03/20/2007	23962 50	25076 25	-1113 75	LT15
25000.0000 MARSHALL & ILSLEY CO		5 626 8/17/09 - 571834AF7 - MINOR = 30				
SOLD		04/28/2009	24602 50			
ACQ	25000 0000	03/28/2008	24602 50	25137 50	-535 00	LT15
100 0000 ABBOTT LABS COM - 002824100		- MINOR = 41				
SOLD		05/14/2009	4478.56			
ACQ	50 0000	03/15/2007	2239 28	2682 00	-442 72	LT15
	50 0000	04/09/2007	2239 28	2873 00	-633 72	LT15
100 0000 BANK OF AMERICA CORP COM - 060505104		- MINOR = 41				
SOLD		05/14/2009	1146 65			
ACQ	50 0000	03/15/2007	573 33	2503 00	-1929 68	LT15
	50.0000	04/09/2007	573 33	2546.50	-1973 18	LT15
158 0000 CEMEX SA SPONS ADR PART CTF - 151290889		- MINOR = 42				
SOLD		05/14/2009	1400 91			
ACQ	75 0000	03/15/2007	664 99	2502 75	-1837 76	LT15
	75 0000	04/09/2007	664 99	2516 25	-1851 26	LT15
	2 4510	06/07/2007	21 73	99.88	-78 15	LT15
	5 5490	06/05/2008	49 20	127 76	-78 56	ST
80 0000 CHEVRONTXACO CORP COM - 166764100		- MINOR = 41				
SOLD		05/14/2009	5446 14			
ACQ	40.0000	03/15/2007	2723 07	2762 00	-38.93	LT15
	40 0000	04/09/2007	2723 07	3023 60	-300 53	LT15
100 0000 CITIGROUP INC COM - 172967101		- MINOR = 41				
SOLD		05/14/2009	355 49			
ACQ	50 0000	03/15/2007	177.75	2495 00	-2317 26	LT15
	50.0000	04/09/2007	177 75	2576 00	-2398 26	LT15
200 0000 CONAGRA INC COM - 205887102		- MINOR = 41				
SOLD		05/14/2009	3535 26			
ACQ	100 0000	03/15/2007	1767 63	2414 00	-646 37	LT15
	100 0000	04/09/2007	1767 63	2499 00	-731 37	LT15
70 0000 EXXON MOBIL CORP - 30231G102		- MINOR = 41				
SOLD		05/14/2009	4885.65			
ACQ	35 0000	03/15/2007	2442.83	2487 10	-44 28	LT15
	35 0000	04/09/2007	2442 83	2691 85	-249 03	LT15
150 0000 GENERAL ELEC CO COM - 369604103		- MINOR = 41				
SOLD		05/14/2009	1962 96			
ACQ	75 0000	03/15/2007	981 48	2598 75	-1617 27	LT15
	75 0000	04/09/2007	981 48	2613 75	-1632 27	LT15
70 0000 ISHARES TR DOW JONES SELECT DIVID IN - 464287168		- MINOR = 79				
SOLD		05/14/2009	2471.28			
ACQ	35 0000	03/15/2007	1235 64	2463.30	-1227.66	LT15
	35 0000	04/09/2007	1235 64	2531 20	-1295.56	LT15
50 0000 ISHARES TR BARCLAYS TIPS BD FD - 464287176		- MINOR = 79				
SOLD		05/14/2009	5043 12			
ACQ	25 0000	03/15/2007	2521 56	2527 00	-5 44	LT15
	25 0000	04/09/2007	2521 56	2504 00	17 56	LT15
70 0000 ISHARES TR MSCI EAFE INDEX FD - 464287465		- MINOR = 79				
SOLD		05/14/2009	3104 90			
ACQ	35 0000	03/15/2007	1552 45	2557 80	-1005 35	LT15
	35 0000	04/09/2007	1552 45	2717 75	-1165 30	LT15
25000 0000 SALINA KANS ARPT AUT 5 400 9/01/10		- 794760EH7 - MINOR = 39				
SOLD		05/14/2009	25864 75			
ACQ	25000 0000	03/23/2007	25864.75	25115 00	749 75	LT15
140 0000 SOUTHERN CO COM - 842587107		- MINOR = 41				
SOLD		05/14/2009	3993 64			
ACQ	70 0000	03/15/2007	1996 82	2496 90	-500 08	LT15
	70 0000	04/09/2007	1996 82	2613 80	-616 98	LT15
100 0000 STANLEY WKS COM - 854616109		- MINOR = 41				
SOLD		05/14/2009	3410 77			
ACQ	50 0000	03/15/2007	1705 39	2720 00	-1014 62	LT15
	50 0000	04/09/2007	1705 39	2809 50	-1104 12	LT15
175 0000 SUN COMMUNITIES INC COM - 866674104		- MINOR = 45				
SOLD		05/14/2009	2547 05			
ACQ	175 0000	09/17/2007	2547 05	4562.19	-2015 14	LT15
300 0000 TECO ENERGY INC COM - 872375100		- MINOR = 41				
SOLD		05/14/2009	3349.95			
ACQ	150 0000	03/15/2007	1674.98	2521 50	-846 53	LT15
	150.0000	04/09/2007	1674 98	2709 00	-1034.03	LT15
130 0000 WASHINGTON MUTUAL INC COM - 939322103		- MINOR = 41				
SOLD		05/14/2009	13 84			
ACQ	65 0000	03/15/2007	6 92	2634 45	-2627 53	LT15
	65.0000	04/09/2007	6 92	2557.10	-2550 18	LT15
150 0000 WELLS FARGO & CO NEW COM - 949746101		- MINOR = 41				
SOLD		05/14/2009	3821 42			
ACQ	75 0000	03/15/2007	1910 71	2560 50	-649.79	LT15
	75 0000	04/09/2007	1910.71	2577.75	-667 04	LT15

STATEMENT B

ACCT 2TTR 7919615
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SUNTRUST BANK
STATEMENT OF CAPITAL GAINS AND LOSSES
RAYMUND FOUNDATION WASMER/SCHROEDER

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TRUST YEAR ENDING 12/31/2009

TAX PREPARER 21
TRUST ADMINISTRATOR 1060
INVESTMENT OFFICER 275

LEGEND F - FEDERAL S - STATE I - INHERITED
E - EXEMPT FROM STATE U - ACQ COST UNKNOWN

PROPERTY DESCRIPTION	SHARES	DATE	SALES PRICE	COST BASIS	GAIN/LOSS	TERM
25000 0000 FED NATL MTG ASSN	4	300% 6/19/13	- 3136F3YW0 - MINOR = 21			
SOLD		06/19/2009	25000.00			
ACQ	25000 0000	12/06/2007	25000 00	25000 00	0 00	LT15
400 0000 COMCAST CORP NEW PFD	SER B - 20030N408 - MINOR = 46					
SOLD		07/24/2009	9479.75			
ACQ	200 0000	03/16/2007	4739 88	5186 00	-446.13	LT15
	200 0000	04/09/2007	4739.88	5178 00	-438 13	LT15
25000 0000 FED HOME LN MTG CORP	6	000% 8/28/18	- 3128X5HV3 - MINOR = 21			
SOLD		08/28/2009	25000 00			
ACQ	25000 0000	03/01/2007	25000.00	25369 25	-369 25	LT15
25000 0000 HOUSEHOLD FIN CORP NT	- 441812JY1 - MINOR = 30					
SOLD		09/08/2009	26817 50			
ACQ	25000 0000	03/01/2007	26817 50	27049 00	-231 50	LT15
25000 0000 MERRILL LYNCH & CO	6	400% 8/28/17	- 59018YJ69 - MINOR = 30			
SOLD		09/10/2009	25223 25			
ACQ	25000 0000	10/25/2007	25223 25	25482 75	-259 50	LT15
25000 0000 PENNSYLVANIA HSG FIN	5	050% 10/01/10	- 708796FL6 - MINOR = 39			
SOLD		09/25/2009	25550 00			
ACQ	25000 0000	03/09/2007	25550 00	25000 00	550 00	LT15
25000 0000 NEW YORK ST HSG FIN	4	965% 9/15/11	- 649870HT2 - MINOR = 39			
SOLD		10/07/2009	26250 00			
ACQ	25000 0000	12/10/2007	26250 00	25044 75	1205 25	LT15
25000 0000 FED HOME LN BK	2	150% 7/30/12	- 3133XUDF7 - MINOR = 21			
SOLD		10/30/2009	25000 00			
ACQ	25000 0000	07/21/2009	25000 00	25000 00	0 00	ST
25000.0000 PNC FDG CORP	7	500% 11/01/09	- 693476AP8 - MINOR = 30			
SOLD		11/01/2009	25000 00			
ACQ	25000 0000	03/20/2007	25000 00	26476 75	-1476 75	LT15
25000.0000 FED HOME LN BK	2	700% 10/09/13	- 3133XUY56 - MINOR = 21			
SOLD		11/30/2009	25145 00			
ACQ	25000 0000	09/29/2009	25145 00	25000 00	145.00	ST
25000 0000 ST LOUIS MO PKG REV	5	110% 12/15/13	- 791676AX7 - MINOR = 39			
SOLD		12/02/2009	24975 00			
ACQ	25000 0000	03/07/2007	24975 00	25078 50	-103.50	LT15
TOTALS			415638 22	463251 43		

SUMMARY OF CAPITAL GAINS/LOSSES

FEDERAL	SHORT TERM	LONG TERM 28%	LONG TERM 15%	ST WASH SALE	LT WASH SALE	1250 GAIN
SUBTOTAL FROM ABOVE	-5 31	0 00	-47607 90	0 00	0 00	0 00
COMMON TRUST FUND	0 00	0 00	0.00			0 00
CAPITAL GAIN DIVIDENDS	0 00	0 00	0 66			0 00
	-5 31	0 00	-47607 24	0 00	0 00	0 00

ATTACHMENT 1FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
SUNTRUST #5308905	56,589.	56,589.
AMA MULTI-STRATEGY FUND, LP	27,477.	27,477.
SUNTRUST WASMER/SCHROEDER	48,591.	48,591.
MULTI-STRATEGY SLV, LP	2,506.	2,506.
TOTAL	<u>135,163.</u>	<u>135,163.</u>

ATTACHMENT 2

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
OTHER INVESTMENT INCOME/(LOSS)	-153.	-153.
TOTALS	-153.	-153.

ATTACHMENT 3

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
PRICEWATERHOUSECOOPERS LLP	15,108.	7,554.		
TOTALS	15,108.	7,554.	0.	0.

FORM 990PF, PART I - INTEREST EXPENSE

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
INVESTMENT INTEREST EXPENSE	13,036.	13,036.
TOTALS	13,036.	13,036.

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FEDERAL EXCISE TAXES PAID	3,000.	0.
STATE TAXES PAID	425.	425.
FOREIGN TAXES PAID	840.	840.
TOTALS	4,265.	1,265.

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
MANAGEMENT FEES	25,980.	25,980.
LICENSES AND PERMITS	70.	70.
OTHER INVESTMENT EXPENSES	13,541.	13,541.
TOTALS	39,591.	39,591.

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

ATTACHMENT 7		
DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
GOVERNMENT BONDS	262,117.	265,006.
US OBLIGATIONS TOTAL	262,117.	265,006.
MUNICIPAL BONDS	360,304.	362,696.
STATE OBLIGATIONS TOTAL	360,304.	362,696.
US AND STATE OBLIGATIONS TOTAL	622,421.	627,702.

FORM 990PF, PART II - CORPORATE STOCKATTACHMENT 8

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
TECH DATA STOCK	2,473,750.	1,633,100.
LEHMAN BROS - STANFIELD MODENA	0.	0.
AMA MULTI-STRATEGY FUND	0.	0.
FAIRHOLME FD COM	670,000.	781,400.
HUSSMAN INVT TR	500,000.	400,627.
HARRIS ASSOC OAKMARK INTL FUND	0.	0.
HARRIS ASSOC OAKMARK SMALL CAP	0.	0.
ISHARES INC	299,939.	327,314.
ISHARES TR	299,962.	303,554.
OTHER COMMON/PREFERRED STOCKS	9,980.	10,776.
MULTI-STRATEGY SLV	202,818.	154,594.
TOTALS	<u>4,456,449.</u>	<u>3,611,365.</u>

FORM 990PF, PART II - CORPORATE BONDS

ATTACHMENT 9

<u>DESCRIPTION</u>	<u>ENDING</u>	<u>ENDING</u>
	<u>BOOK VALUE</u>	<u>FMV</u>
TAXABLE BONDS	2,035,353.	2,040,617.
TOTALS	<u>2,035,353.</u>	<u>2,040,617.</u>

ATTACHMENT 10FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCESDESCRIPTIONAMOUNT

BOOK/TAX DIFFERENCE

24,549.

TOTAL

24,549.

RAYMUND FOUNDATION, INC.

59-3447494

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 11

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
------------------	---	--------------	---	---

STEVEN A. RAYMUND
5350 TECH DATA DRIVE
CLEARWATER, FL 33760

PRESIDENT
5.00

0.

0.

0.

GRAND TOTALS

0.

0.

0.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 12

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR
AND
FOUNDATION STATUS OF RECIPIENT

RECIPIENT NAME AND ADDRESS

PURPOSE OF GRANT OR CONTRIBUTION

AMOUNT

SEE STATEMENT ATTACHED

NONE

GENERAL FUND

424,455

501(C)(3) ORGANIZATION

TOTAL CONTRIBUTIONS PAID

424,455