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

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

, and ending

G Check all that apply:  Initial return  Initial return of a former public charity  Final return  
 Amended return  Address change  Name change

Use the IRS label. Otherwise, print or type See Specific Instructions.		Name of foundation <b>SARASOTA COUNTY FOUNDATION</b> Number and street (or P O box number if mail is not delivered to street address) <b>P O BOX 267</b> City or town, state, and ZIP code <b>SARASOTA, FL 34230</b>		A Employer identification number <b>59-6169723</b>  B Telephone number <b>941-361-5803</b>	
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		I Fair market value of all assets at end of year (from Part II, col (c), line 16) <b>\$ 1,229,579.</b> (Part I, column (d) must be on cash basis)		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	
<b>Part I</b> 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	
Revenue	1 Contributions, gifts, grants, etc., received			<b>N/A</b>	
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B Interest on savings and temporary cash investments				
	3				
	4 Dividends and interest from securities	<b>34,719.</b>	<b>34,719.</b>	<b>STATEMENT 1</b>	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10 Gross sales price for all assets on line 6a	<b>10,390.</b>			
	6b				
	7 Capital gain net income (from Part IV, line 2)		<b>10,390.</b>		
	8 Net short-term capital gain				
	9 Income modifications Gross sales less returns and allowances				
	10a <b>RECEIVED</b> b Less Cost of goods sold c Gross profit or (loss)				
11 Other income					
12 Total. Add lines 1 through 11	<b>45,109.</b>	<b>45,109.</b>			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	<b>13,370.</b>	<b>9,370.</b>	<b>4,000.</b>	
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees	<b>STMT 2</b>	<b>6,850.</b>	<b>0.</b>	<b>6,850.</b>
	c Other professional fees				
	17 Interest				
	18 Taxes	<b>STMT 3</b>	<b>715.</b>	<b>0.</b>	<b>0.</b>
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses				
	24 Total operating and administrative expenses. Add lines 13 through 23		<b>9,370.</b>		<b>10,850.</b>
25 Contributions, gifts, grants paid		<b>41,000.</b>		<b>41,000.</b>	
26 Total expenses and disbursements Add lines 24 and 25		<b>9,370.</b>		<b>51,850.</b>	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)		<b>&lt;16,826.00&gt;</b>			
c Adjusted net income (if negative, enter -0-)			<b>35,739.</b>		
			<b>N/A</b>		

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
	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments		80,777.	39,026.
	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		7,268.	6,553.
	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock	STMT 4	581,069.	712,518.
	c	Investments - corporate bonds	STMT 5	363,638.	408,788.
	11	Investments - land, buildings, and equipment: basis ►			
		Less accumulated depreciation ►			
	12	Investments - mortgage loans			
	13	Investments - other			
	14	Land, buildings, and equipment: basis ►			
		Less accumulated depreciation ►			
	15	Other assets (describe ►	STATEMENT 6 )	0.	62,694.
	16	Total assets (to be completed by all filers)		1,032,752.	1,229,579.
	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.
		Foundations that follow SFAS 117, check here ► <input checked="" type="checkbox"/>			
		and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted		1,032,752.	1,229,579.
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ► <input type="checkbox"/>			
		and complete lines 27 through 31.			
	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			
	30	Total net assets or fund balances		1,032,752.	1,229,579.
	31	Total liabilities and net assets/fund balances		1,032,752.	1,229,579.

## 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	1,032,752.
2	Enter amount from Part I, line 27a	2	<16,826.>
3	Other increases not included in line 2 (itemize) ► <u>UNREALIZED GAIN</u>	3	213,653.
4	Add lines 1, 2, and 3	4	1,229,579.
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	1,229,579.

**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 WACHOVIA (SEE ATTACHED)</b>			P	VARIOUS	VARIOUS
<b>b WACHOVIA (SEE ATTACHED)</b>			P	VARIOUS	VARIOUS
<b>c WACHOVIA CAP GAIN DIV</b>			P	VARIOUS	VARIOUS
<b>d WACHOVIA CAP GAIN DIV</b>			P	VARIOUS	VARIOUS
<b>e</b>					
<b>(e) Gross sales price</b>	<b>(f) Depreciation allowed (or allowable)</b>	<b>(g) Cost or other basis plus expense of sale</b>		<b>(h) Gain or (loss) (e) plus (f) minus (g)</b>	
<b>a 9,963.</b>		<b>8,999.</b>		<b>964.</b>	
<b>b 90,277.</b>		<b>83,618.</b>		<b>6,659.</b>	
<b>c 2,066.</b>				<b>2,066.</b>	
<b>d 701.</b>				<b>701.</b>	
<b>e</b>					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				<b>(I) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))</b>	
<b>(i) F.M.V. as of 12/31/69</b>	<b>(j) Adjusted basis as of 12/31/69</b>	<b>(k) Excess of col. (i) over col. (j), if any</b>			
<b>a</b>				<b>964.</b>	
<b>b</b>				<b>6,659.</b>	
<b>c</b>				<b>2,066.</b>	
<b>d</b>				<b>701.</b>	
<b>e</b>					
<b>2 Capital gain net income or (net capital loss)</b>	<b>{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</b>		<b>2</b>		<b>10,390.</b>
<b>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</b>			<b>3</b>		<b>N/A</b>

**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	<b>77,403.</b>	<b>1,222,401.</b>	<b>.063320</b>
2007	<b>71,000.</b>	<b>1,419,426.</b>	<b>.050020</b>
2006	<b>63,515.</b>	<b>1,329,494.</b>	<b>.047774</b>
2005	<b>63,800.</b>	<b>1,280,692.</b>	<b>.049817</b>
2004	<b>71,487.</b>	<b>1,272,381.</b>	<b>.056184</b>
<b>2 Total of line 1, column (d)</b>		<b>2</b>	<b>.267115</b>
<b>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</b>		<b>3</b>	<b>.053423</b>
<b>4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5</b>		<b>4</b>	<b>1,063,688.</b>
<b>5 Multiply line 4 by line 3</b>		<b>5</b>	<b>56,825.</b>
<b>6 Enter 1% of net investment income (1% of Part I, line 27b)</b>		<b>6</b>	<b>357.</b>
<b>7 Add lines 5 and 6</b>		<b>7</b>	<b>57,182.</b>
<b>8 Enter qualifying distributions from Part XII, line 4</b>		<b>8</b>	<b>51,850.</b>

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 ►  and enter "N/A" on line 1.

Date of ruling or determination letter: \_\_\_\_\_ (attach copy of letter if necessary-see instructions)

b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ►  and enter 1% of Part I, line 27b

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-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

6 Credits/Payments:

a 2009 estimated tax payments and 2008 overpayment credited to 2009

6a 7,268.

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 7,268.

8 Enter any penalty for underpayment of estimated tax. Check here  if Form 2220 is attached

8

9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

9

10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid

10

6,553.

11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ►

6,553. | Refunded ►

11

0.

**Part VII-A Statements Regarding Activities**

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

Yes  No 

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?

1a *If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*1b 

c Did the foundation file Form 1120-POL for this year?

1c 

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:

(1) On the foundation. ► \$ 0. (2) On foundation managers. ► \$ 0.

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 0.

2 Has the foundation engaged in any activities that have not previously been reported to the IRS?

2 *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*3 

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4a 

b If "Yes," has it filed a tax return on Form 990-T for this year?

N/A

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

5 *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:

6 • 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?

7 Did the foundation have at least \$5,000 in assets at any time during the year?

7 *If "Yes," complete Part II, col. (c), and Part XV*

8a Enter the states to which the foundation reports or with which it is registered (see instructions) ►

8b **FL**

b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation

9 

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

10 

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

**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	<input checked="" type="checkbox"/>
----	-------------------------------------

12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?

12	<input checked="" type="checkbox"/>
----	-------------------------------------

13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?

Website address ► **WWW.WACHOVIA.COM/CORP INST/CHARITABLE SERVICES**

14 The books are in care of ► **WACHOVIA BANK** Telephone no. ► **941-361-5803**

Located at ► **1819 MAIN ST., SARASOTA, FLORIDA**

ZIP+4 ► **34236**

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.**

1a During the year did the foundation (either directly or indirectly):

- (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  Yes  No
- (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  Yes  No
- (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  Yes  No
- (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  Yes  No
- (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  Yes  No
- (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)  Yes  No

b If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?

Organizations relying on a current notice regarding disaster assistance check here ►

c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?

2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):

a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?  Yes  No

If "Yes," list the years ► \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

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

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?  Yes  No

b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)

N/A

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

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?

3b

4a | X

4b | X

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

<b>5a</b> 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))?	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	No
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	No
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	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)?	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	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?	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/>	No
<b>b</b> If any answer is "Yes" to 5a(1)-(5), did <b>any</b> 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)?	<b>N/A</b>			
Organizations relying on a current notice regarding disaster assistance check here	<input type="checkbox"/>			
<b>c</b> 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?	<b>N/A</b>			
<i>If "Yes," attach the statement required by Regulations section 53.4945-5(d)</i>	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/>			
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	<input type="checkbox"/>			
<i>If "Yes" to 6b, file Form 8870</i>				
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/>			
<b>b</b> If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	<b>N/A</b>			

## 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.**

**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
<b>NONE</b>				

**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. If none, enter "NONE."**

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

**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	<b>N/A</b>	
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	<b>N/A</b>	
2		
3		

All other program-related investments. See instructions.

3		
Total. Add lines 1 through 3	►	<b>0.</b>

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**Part X Minimum Investment Return** (All domestic foundations must complete this part Foreign foundations, see 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	1,028,008.
b	Average of monthly cash balances	1b	44,610.
c	Fair market value of all other assets	1c	7,268.
d	<b>Total</b> (add lines 1a, b, and c)	1d	1,079,886.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,079,886.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	16,198.
5	<b>Net value of noncharitable-use assets</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,063,688.
6	<b>Minimum investment return</b> Enter 5% of line 5	6	53,184.

**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.)

1	Minimum investment return from Part X, line 6	1	53,184.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	715.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	715.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	52,469.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	52,469.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	52,469.

**Part XII Qualifying Distributions** (see 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	51,850.
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	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	51,850.
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	5	0.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	51,850.

**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
1 Distributable amount for 2009 from Part XI, line 7				52,469.
2 Undistributed income, if any, as of the end of 2009			0.	
a Enter amount for 2008 only				
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	8,261.			
b From 2005	706.			
c From 2006				
d From 2007	2,895.			
e From 2008	16,977.			
f Total of lines 3a through e	28,839.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 51,850.			0.	
a Applied to 2008, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount			51,850.	
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	619.			619.
6 Enter the net total of each column as indicated below:	28,220.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		0.		
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	7,642.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	20,578.			
10 Analysis of line 9:				
a Excess from 2005	706.			
b Excess from 2006				
c Excess from 2007	2,895.			
d Excess from 2008	16,977.			
e Excess from 2009				



## Part XV Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
SEE STATEMENT 8				
<b>Total</b>			► 3a	<b>41,000.</b>
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>			► 3b	<b>0.</b>

## 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
	(a) Business code	(b) Amount	(c) Exclu- sion 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	34,719.
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory				18	10,390.
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)		0.		45,109.	0.
13 Total. Add line 12, columns (b), (d), and (e)				13	45,109.

(See worksheet in line 13 instructions to verify calculations.)

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

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



FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
-------------	--	-----------	---

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDENDS & INTEREST	34,719.	0.	34,719.
TOTAL TO FM 990-PF, PART I, LN 4	34,719.	0.	34,719.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	2
-------------	-----------------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEE	6,850.	0.		6,850.
TO FORM 990-PF, PG 1, LN 16B	6,850.	0.		6,850.

FORM 990-PF	TAXES	STATEMENT	3
-------------	-------	-----------	---

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX	715.	0.		0.
TO FORM 990-PF, PG 1, LN 18	715.	0.		0.

FORM 990-PF	CORPORATE STOCK	STATEMENT	4
-------------	-----------------	-----------	---

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK	712,518.	712,518.
TOTAL TO FORM 990-PF, PART II, LINE 10B	712,518.	712,518.

FORM 990-PF	CORPORATE BONDS	STATEMENT	5
-------------	-----------------	-----------	---

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	408,788.	408,788.
TOTAL TO FORM 990-PF, PART II, LINE 10C	408,788.	408,788.

FORM 990-PF	OTHER ASSETS	STATEMENT	6
-------------	--------------	-----------	---

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
SALES PROCEEDS IN TRANSIT	0.	62,694.	62,694.
TO FORM 990-PF, PART II, LINE 15	0.	62,694.	62,694.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION  
PART XV, LINES 2A THROUGH 2D

STATEMENT

7

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

JOAN GREENWOOD  
P O BOX 267  
SARASOTA, FL 34230

TELEPHONE NUMBER

941-361-5803

FORM AND CONTENT OF APPLICATIONS

COPY ATTACHED

ANY SUBMISSION DEADLINES

JANUARY 15  
JANUARY 15

RESTRICTIONS AND LIMITATIONS ON AWARDS

WHEN POSSIBLE AND PRACTICAL, RESTRICTED TO GEOGRAPHICAL AREA OF SARASOTA COUNTY.

FORM 990-PF

GRANTS AND CONTRIBUTIONS  
PAID DURING THE YEAR

STATEMENT 8

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
CHILDREN FIRST 1723 N ORANGE SARASOTA, FL 34234	NONE MEALS	PUBLIC CHARITY	7,500.
FLORIDA CENTER FOR CHILD AND FAMILY DEVELOPMENT 4620 17TH ST SARASOTA, FL 34235	NONE PROVIDE SCHOLARSHIPS	PUBLIC CHARITY	5,000.
GIRLS INC 201 S TUTTLE AVE SARASOTA, FL 34237	NONE PROVIDE SCHOLARSHIPS	PUBLIC CHARITY	6,500.
PINES OF SARASOTA 1501 N ORANGE SARASOTA, FL 34236	NONE RENOVATION OF ALZHEIMER'S FACILITY	PUBLIC CHARITY	7,500.
SAMARITAN COUNSELING SERVICES OF THE GULF COAST 3224 BEE RIDGE RD SARASOTA, FL 34239	NONE ASSIST LOW INCOME UNINSURED AND UNDERINSURED	PUBLIC CHARITY	5,000.
SECOND CHANCE LAST OPPORTUNITY FOUNDATION 1933 MARTIN LUTHER KING SARASOTA, FL 34234	NONE AT RISK TEENS LIFE MANAGEMENT & LEADERSHIP SKILLS	PUBLIC CHARITY	5,000.
UPSIDE DOWN FOUNDATION 800 S OSPREY AVE SARASOTA, FL 34236	NONE PRACTICING GOOD DECISIONS PROGRAM	PUBLIC CHARITY	4,500.
TOTAL TO FORM 990-PF, PART XV, LINE 3A			<u>41,000.</u>

ACCT 543P 4019312296  
FROM 01/01/2009  
TO 12/31/2009

WACHOVIA BANK, N. A.  
STATEMENT OF CAPITAL GAINS AND LOSSES  
SARASOTA CNTY FD  
TRUST YEAR ENDING 12/31/2009

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07:35:27 AM

TAX PREPARER: 6534  
TRUST ADMINISTRATOR: 220  
INVESTMENT OFFICER: 5164

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
285.0000 BANK AMER CORP COM - 060505104						
SOLD		02/04/2009	1467.74			
ACQ	285.0000	01/28/2002	1467.74	9030.22	-7562.48	LT15
50.0000 INTL BUSINESS MACHINES CORP COM - 459200101	- MINOR = 31001					
SOLD		02/04/2009	4733.97			
ACQ	50.0000	01/28/2002	4733.97	5464.00	-730.03	LT15
120.0000 AGILENT TECHNOLOGIES INC COM - 00846U101	- MINOR = 3101					
SOLD		03/24/2009	1906.79			
ACQ	120.0000	09/26/2006	1906.79	3723.39	-1816.60	LT15
150.0000 BMC SOFTWARE INC COM RTS EXP 05/12/2005 - 055921100	- MINOR = 3101					
SOLD		03/24/2009	4856.99			
ACQ	150.0000	09/28/2007	4856.99	4662.00	194.99	LT15
50.0000 INTL BUSINESS MACHINES CORP COM - 459200101	- MINOR = 31001					
SOLD		03/24/2009	4934.47			
ACQ	50.0000	01/28/2002	4934.47	5464.00	-529.53	LT15
270.0000 AT&T INC - 00206R102	- MINOR = 3101					
SOLD		07/17/2009	6412.36			
ACQ	270.0000	01/25/2005	6412.36	5385.74	1026.62	LT15
60.0000 FIRSTENERGY CORP COM 12/01/2004 - 337932107	- MINOR = 3101					
SOLD		07/17/2009	2430.53			
ACQ	60.0000	03/24/2009	2430.53	2378.40	52.13	ST
80.0000 HEWLETT-PACKARD CO COM - 428235103	- MINOR = 5010					
SOLD		07/17/2009	3181.51			
ACQ	80.0000	12/11/2006	3181.51	3205.60	-24.09	LT15
35.0000 JOHNSON & JOHNSON COM - 478160104	- MINOR = 31001					
SOLD		07/17/2009	2064.59			
ACQ	35.0000	01/13/2005	2064.59	2211.30	-146.71	LT15
100.0000 PROCTER & GAMBLE CO COM - 742718109						
SOLD		07/17/2009	5550.86			
ACQ	100.0000	01/13/2005	5550.86	5603.00	-52.14	LT15
17.0000 KRISPY KREME DOUGHNUTS INC WTS EXP 03/02 - 501014112	- MINOR = 75					
SOLD		10/12/2009	1.01			
ACQ	17.0000	04/22/2009	1.01	1.01	0.00	ST
**CHANGED** 12/16/09 TB						
260.0000 AT&T INC - 00206R102	- MINOR = 3101					
SOLD		12/31/2009	7329.21			
ACQ	260.0000	01/25/2005	7329.21	5186.26	2142.95	LT15
55.0000 AON CORP COM - 037389103	- MINOR = 3101					
SOLD		12/31/2009	2118.54			
ACQ	55.0000	07/17/2009	2118.54	2079.00	39.54	ST
150.0000 BECTON DICKINSON & CO COM - 075887109	- MINOR = 31001					
SOLD		12/31/2009	11878.69			
ACQ	150.0000	12/11/2006	11878.69	10904.51	974.18	LT15
35.0000 COLGATE-PALMOLIVE CO COM - 194162103	- MINOR = 5010					
SOLD		12/31/2009	2894.07			
ACQ	35.0000	12/22/2008	2894.07	2286.90	607.17	LT15
60.0000 DEVON ENERGY CORP NEW COM - 25179M103	- MINOR = 3101					
SOLD		12/31/2009	4435.08			
ACQ	60.0000	10/06/2003	4435.08	1441.20	2993.88	LT15
220.0000 GENERAL ELEC CO COM - 369604103	- MINOR = SBE					
SOLD		12/31/2009	3343.91			
ACQ	220.0000	05/22/1991	3343.91	1316.80	2027.11	LT15
50.0000 HEWLETT-PACKARD CO,COM - 428236103	- MINOR = 5010					
SOLD		12/31/2009	2598.43			
ACQ	50.0000	12/11/2006	2598.43	2003.50	594.93	LT15
120.0000 JP MORGAN CHASE-& CO COM - 46625H100	- MINOR = 31001					
SOLD		12/31/2009	5025.47			
ACQ	120.0000	01/13/2005	5025.47	4563.60	461.87	LT15
30.0000 LOCKHEED MARTIN CORP COM - 539830109	- MINOR = 3101					
SOLD		12/31/2009	2266.14			
ACQ	30.0000	07/17/2009	2266.14	2449.50	-183.36	ST
70.0000 MICROSOFT CORP COM - 594918104	- MINOR = 31001					
SOLD		12/31/2009	2149.64			
ACQ	70.0000	12/27/1995	2149.64	407.77	1741.87	LT15
80.0000 OIL STATES INTERNATIONAL INC COM - 678026105	- MINOR = 75					
SOLD		12/31/2009	3147.11			
ACQ	80.0000	07/17/2009	3147.11	2091.20	1055.91	ST
40.0000 PRECISION CASTPARTS CORP COM - 740189105	- MINOR = 75					
SOLD		12/31/2009	4456.68			
ACQ	40.0000	12/09/2008	4456.68	2195.60	2261.08	LT15
40.0000 PROCTER & GAMBLE CO COM - 742713109						
SOLD		12/31/2009	2438.73			
ACQ	40.0000	01/13/2005	2438.73	2241.20	197.53	LT15
70.0000 ST. JUDE MED INC - 790849103	- MINOR = 3101					
SOLD		12/31/2009	2587.13			
ACQ	70.0000	12/09/2008	2587.13	2140.60	446.53	LT15
50.0000 SEMPRA ENERGY COM - 816851109	- MINOR = 3101					
SOLD		12/31/2009	2825.92			
ACQ	50.0000	12/22/2008	2825.92	2032.00	793.92	LT15
75.0000 COOPER INDUSTRIES PLC-CL A COM - G24140108	- MINOR = 75					
SOLD		12/31/2009	3204.66			
ACQ	75.0000	12/09/2008	3204.66	2148.75	1055.91	LT15
TOTALS			100240.23	92617.05		

ACCT 543P 4019312296  
FROM 01/01/2009  
TO 12/31/2009

WACHOVIA BANK, N. A.  
STATEMENT OF CAPITAL GAINS AND LOSSES  
SARASOTA CNTY FD

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TRUST YEAR ENDING 12/31/2009

TAX PREPARER: 6534  
TRUST ADMINISTRATOR: 220  
INVESTMENT OFFICER: 5164

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
----------------------	--------	------	-------------	------------	-----------	------

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	964.22	0.00	6658.96	0.00	0.00	0.00*
COMMON TRUST FUND	0.00	0.00	0.00			0.00
CAPITAL GAIN DIVIDENDS	2065.76	0.00	701.01			0.00
	3029.98	0.00	7359.97	0.00	0.00	0.00
STATE						
SUBTOTAL FROM ABOVE	964.22	0.00	6658.96	0.00	0.00	0.00*
COMMON TRUST FUND	0.00	0.00	0.00			0.00
CAPITAL GAIN DIVIDENDS	2065.76	0.00	701.01			0.00
	3029.98	0.00	7359.97	0.00	0.00	0.00

\* - 1250 GAIN DETAILED ON TRANS PAGES, NOT ABOVE

CAPITAL LOSS CARRYOVER

FEDERAL	0.00	0.00
FLORIDA	N/A	N/A

	Sale	Cost	
ST	9,963.33	8,791.11	964.22
LT	9,0276.90	83,017.44	6,658.96



## GRANT GUIDELINES

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The Sarasota County Foundation makes grants to qualified 501©(3) organizations in Sarasota County. Wachovia Bank has served as Trustee since 1958.

The purpose of the Foundation is to provide grants for any charitable, religious, educational, literary or scientific purposes. Payments may also be made to corporations or associations now or hereafter organized maintaining institutions for any one or more of the charitable, religious, educational, literary or scientific purposes aforesaid, or formed to distribute and apply such funds to any one or more such purposes, whether located in the City and County of Sarasota or elsewhere. However, preference shall be given to services and programs within Sarasota County.

The Foundation will generally not provide grants for:

- Endowments
- Travel
- Research
- Annual Giving Campaigns
- Completed Projects
- Debt Reduction
- Deficit Financing
- Operating/Program Expenses
- Marketing Materials and Advertising
- Conference, Workshops, or Seminars

All requests must include:

- Background information on the organization, including a brief history, the organization's current address and phone number and the name and title of the primary contact
- The goals, objectives, and budget for the one project or program which funds are being requested
- The amount of the grant requested
- Summary of how the funds will be used
- Supporting financial information on the organization, to include current financial status and listing of Board of Trustees
- Copy of organization's tax exemption letter from the Internal Revenue Service

Requests must be received by January 15 for consideration. You will be notified

in writing of the Committee's decision by March 15.

Please note: Organizations may not apply to both this foundation and Cordelia Lee Beattie Foundation within the same year.

**Contact Us**

Sarasota County Foundation  
c/o Wachovia Bank, N.A., Trustee  
1819 Main Street, Suite 230  
Sarasota, FL 34236  
joan.greenwood@wachovia.com

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Charitable Services Group

## **GRANT REQUEST INSTRUCTIONS and APPLICATION FORM**

Updated 07/31/2006

Wachovia Bank's Charitable Services Group has the responsibility of grant administration for various foundations. This set of documents provides you with both Instructions and an Application Form.

### Guidelines

Each Foundation has specific Guidelines in keeping with the purpose of the foundation. Guidelines may be requested by contacting our offices. Contact information is listed on the first page link of each foundation listed in this website.

### Criteria & Limitations

Qualifying tax-exempt (501 (c) 3) organizations are eligible for grants if they meet the purpose of the foundation to which they are applying. Grants are not made for political purposes, nor to organizations which discriminate on the basis of race, ethnic origin, sexual or religious preference, age or gender. Some foundations may have more specific restrictions. Please refer to specific restrictions as listed in each foundation's guidelines. Deadlines for submitting proposals are specific to each foundation and are also listed in each foundation's guidelines.

### Proposal Format

Proposals should be submitted in the following format:

1. Completed Common Grant Application Form (included in this information)
2. An original Proposal Statement.
3. An audited financial report and a current year operating budget
4. A copy of your official IRS Letter with your tax determination.
5. A Listing of your Board of Directors
6. Please include a total of six (6) copies of your proposal

### Proposal Statements

Proposal Statements (second item in the above Format) should answer these questions:

- What are the objectives and expected outcomes of this program/project/request?
- What strategies will be used to accomplish your objective?
- What is the timeline for completion?
- If this is part of an on-going program, how long has it been in operation?
- What criteria will you use to measure success?
- If the request is not fully funded, what other sources can you engage?
- An Itemized budget should be included.
- Please describe any collaborative ventures.

### Communication

You will receive notice acknowledging our receipt of the grant request, and subsequently be notified of your grant declination or approval. Prior to the distribution of funds, all approved grantees must sign and return to us a Grant Agreement Form, stating that the funds will be used for the purpose intended. Progress reports and Completion reports must also be filed as required for your specific grant. All current grantees must be in good standing with required documentation prior to submitting new proposals to any foundation.

## **COMMON GRANT APPLICATION**

To

WACHOVIA BANK, N.A.  
Charitable Services Group

---

***(NAME OF FOUNDATION from which you are seeking funds)***

---

***(GEOGRAPHIC STATE ADDRESS OF FOUNDATION from which you are seeking funds)***

- 1]** Date of Proposal: \_\_\_\_\_
- 2]** Name of Organization: \_\_\_\_\_
- 3]** Address: \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip Code: \_\_\_\_\_
- 4]** Phone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_
- 5]** Contact Person: \_\_\_\_\_  
(First Name) (Middle Initial) (Last Name) (Title)
- 6]** Tax ID/Registration #: \_\_\_\_\_ 501 c(3) Date: \_\_\_\_\_
- 7]** Your Organization's Information: \_\_\_\_\_ Date Established: \_\_\_\_\_  
Organization Background: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 8]** Amount Requested: \$ \_\_\_\_\_
- 9]** Brief Description of Request: \_\_\_\_\_  
***(2-7 words) What exactly are you requesting funding for?***
- 10]** Program Area: \_\_\_\_\_  
(Arts and Culture, Education, Health and Human Services, Social and Civic Services, or Environmental)

11] Project/Request Description: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

12] Geographic Area(s) Served: \_\_\_\_\_

13] Client Population Served: \_\_\_\_\_  
[Specifics please - i.e., age groups, children, elderly, homeless, disabled, etc.]

14] Number of Individuals served: \_\_\_\_\_

15] Organization's Annual Budget: \$ \_\_\_\_\_

- a) Last Fiscal Year Total Revenue: \$ \_\_\_\_\_
- b) Last Fiscal Year Total Expenses: \$ \_\_\_\_\_
- c) Administrative Expense Ratio to Total Budget: \$ \_\_\_\_\_
- d) Last Fiscal Year Total Assets: \$ \_\_\_\_\_
- e) Last Fiscal Year Total Debt: \$ \_\_\_\_\_
- f) Name and Address of your Auditor/CPA  
\_\_\_\_\_  
\_\_\_\_\_

16] Total Project Budget (If applicable): \$ \_\_\_\_\_

Human Resources Costs: \$ \_\_\_\_\_

Program Costs: \$ \_\_\_\_\_

Program Shortfall: \$ \_\_\_\_\_

17] Three Major Funders of your organization:

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

18] Confirmed Funders for this Program/Project (If applicable)

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Name of Applicant & Title

Signature

Date

Application for Extension of Time To File an  
Exempt Organization Return

► 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
- 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](http://www.irs.gov/efile) and click on e-file for Charities & Nonprofits.

Type or print Name File by the due date for filing your return. See instructions	Name of Exempt Organization <b>SARASOTA COUNTY FOUNDATION</b> Number, street, and room or suite no. If a P O box, see instructions. <b>P O BOX 267</b>	Employer identification number <b>59-6169723</b>
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>SARASOTA, FL 34230</b>	

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 ► **WACHOVIA BANK**

Telephone No ► **941-361-5803** 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 **AUGUST 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	\$ <b>715.</b>
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	\$ <b>7,268.</b>
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	\$ <b>0.</b>

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.

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

Form 8868 (Rev. 4-2009)

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

**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).

<b>Part II</b>	<b>Additional (Not Automatic) 3-Month Extension of Time.</b> Only file the original (no copies needed)	
<b>Type or print</b>	Name of Exempt Organization <b>SARASOTA COUNTY FOUNDATION</b>	Employer identification number <b>59-6169723</b>
<b>File by the extended due date for filing the return. See instructions</b>	Number, street, and room or suite no. If a P O box, see instructions <b>P O BOX 267</b>	For IRS use only
	City, town or post office, state, and ZIP code For a foreign address, see instructions <b>SARASOTA, FL 34230</b>	

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

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

- The books are in the care of ► **WACHOVIA BANK**

Telephone No ► **941-361-5803**

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

**ADDITIONAL TIME IS NEEDED TO GATHER 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	\$ <b>715.</b>
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	\$ <b>7,268.</b>
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	\$ <b>0.</b>

**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 ► C. Munge

Title ►

Date ► **8-2-10**

Form 8868 (Rev. 4-2009)