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Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Service

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 GENE & FLORENCE MONDAY FOUNDATION, INC.		A Employer identification number 62-1518306
	Number and street (or P O box number if mail is not delivered to street address) Room/suite 1810 AILOR AVENUE		B Telephone number (865) 525-0238
	City or town, state, and ZIP code KNOXVILLE, TN 37921		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 ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 4,023,007. (Part I, column (d) must be on cash basis.)			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(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	186,727.		N/A	
2	Check ☐ if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	923,775.	923,775.		STATEMENT 1
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	0.			
b	Gross sales price for all assets on line 6a	245,000.			
7	Capital gain net income (from Part IV line 2)		0.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss)				
11	Other income	1,146.	1,146.		STATEMENT 2
12	Total Add lines 1 through 11	1,111,648.	924,921.		
13	Compensation of officers, directors, trustees, etc	0.	0.		0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees				
b	Accounting fees				
c	Other professional fees				
17	Interest				
18	Taxes	3,658.	0.		0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses STMT 4	12,030.	95.		0.
24	Total operating and administrative expenses. Add lines 13 through 23	15,688.	95.		0.
25	Contributions, gifts, grants paid	240,000.			240,000.
26	Total expenses and disbursements. Add lines 24 and 25	255,688.	95.		240,000.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	855,960.			
b	Net investment income (if negative, enter -0-)		924,826.		
c	Adjusted net income (if negative, enter -0-)			N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash - non-interest-bearing			798.	1,063.	1,063.
	2 Savings and temporary cash investments			423,960.	189,525.	189,525.
	3 Accounts receivable ▶					
	Less: allowance for doubtful accounts ▶					
	4 Pledges receivable ▶					
	Less: allowance for doubtful accounts ▶					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons					
	7 Other notes and loans receivable ▶					
	Less: allowance for doubtful accounts ▶					
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges					
	10a Investments - U.S. and state government obligations					
	b Investments - corporate stock STMT 5			2,605,022.	2,974,528.	2,974,528.
	c Investments - corporate bonds STMT 6			0.	857,891.	857,891.
11 Investments - land, buildings and equipment basis ▶						
Less: accumulated depreciation ▶						
12 Investments - mortgage loans						
13 Investments - other STMT 7			1,091,156.	0.	0.	
14 Land, buildings, and equipment basis ▶						
Less: accumulated depreciation ▶						
15 Other assets (describe ▶)						
16 Total assets (to be completed by all filers)			4,120,936.	4,023,007.	4,023,007.	
Liabilities	17 Accounts payable and accrued expenses					
	18 Grants payable				10,000.	
	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.	10,000.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.					
	24 Unrestricted			4,120,936.	4,013,007.	
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ ☐ 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			4,120,936.	4,013,007.		
31 Total liabilities and net assets/fund balances			4,120,936.	4,023,007.		

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	4,120,936.
2 Enter amount from Part I, line 27a	2	855,960.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	4,976,896.
5 Decreases not included in line 2 (itemize) ▶ UNREALIZED GAIN/LOSS ON INVESTMENTS	5	963,889.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,013,007.

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			
b SEE ATTACHED STATEMENT			
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 245,000.		245,000.	

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

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	0.
	3	N/A
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		

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	237,898.	4,659,357.	.051058
2007	253,851.	5,048,924.	.050278
2006	247,768.	5,036,870.	.049191
2005	137,500.	4,946,634.	.027797
2004	200,000.	4,918,357.	.040664

2 Total of line 1, column (d)	2	.218988
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	.043798
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	4,168,571.
5 Multiply line 4 by line 3	5	182,575.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	9,248.
7 Add lines 5 and 6	7	191,823.
8 Enter qualifying distributions from Part XII, line 4	8	240,000.

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		1	9,248.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	9,248.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	9,248.
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	4,120.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	8,500.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	12,620.	
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	3,372.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ☒ 3,372. Refunded ☐	11	0.	

Part VII-A Statements Regarding Activities

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

14 The books are in care of ► KENNETH W. HOLBERT Telephone no. ► (865) 525-0238
 Located at ► 1810 AILOR AVENUE, KNOXVILLE, TN ZIP+4 ► 37921

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ► ☐
 and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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 <u>N/A</u> ► ☐	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	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? ☐ 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.) <u>N/A</u>	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____ , _____ , _____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ 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.) <u>N/A</u>	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)?

☐ Yes ☒ No

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

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☐

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

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

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?

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 9		0.	0.	0.

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

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

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

0

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

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

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

0

Part IX-A Summary of Direct Charitable Activities

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

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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

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	3,859,473.
b	Average of monthly cash balances	1b	372,579.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	4,232,052.
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	4,232,052.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	63,481.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,168,571.
6	Minimum investment return. Enter 5% of line 5	6	208,429.

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	208,429.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	9,248.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	9,248.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	199,181.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	199,181.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	199,181.

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	240,000.
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	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	240,000.
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	9,248.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	230,752.

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.

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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				199,181.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			110,517.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 240,000.				
a Applied to 2008, but not more than line 2a			110,517.	
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				129,483.
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))	0.			0.
6 Enter the net total of each column as indicated below:				
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				69,698.
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	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

N/A

b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(1)(3) or ☐ 4942(1)(5)

(4) Gross investment income

[illegible]

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

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

Employer identification number

GENE & FLORENCE MONDAY FOUNDATION, INC.**62-1518306**

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 foundationCheck 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 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).

LHA 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

Employer identification number

GENE & FLORENCE MONDAY FOUNDATION, INC.

62-1518306

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	GFM, INC. P.O. BOX 1 KNOXVILLE, TN 37901	\$ 136,485.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
2	ROBERT N STRONG HOME TRUST 1810 AILOR AVE KNOXVILLE, TN 37921	\$ 50,242.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

GENE & FLORENCE MONDAY FOUNDATION, INC.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	35,000 DISCOVER 5.3	P	06/18/07	06/29/09
b	35,000 GMAC BANK 5.25	P	07/16/07	07/24/09
c	35,000 FLAGSTAR BANK 5.15	P	08/27/07	08/31/09
d	35,000 BANCO POPULAR 4.9	P	09/18/07	09/28/09
e	35,000 WESTERNBANK PUERTO RICO 4.85	P	10/18/07	10/23/09
f	35,000 WESTERNBANK PUERTO RICO 4.7	P	11/15/07	11/23/09
g	35,000 SILVERTON BANK 3.65	P	05/19/08	05/06/09
h				
i				
j				
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 35,000.		35,000.	0.
b 35,000.		35,000.	0.
c 35,000.		35,000.	0.
d 35,000.		35,000.	0.
e 35,000.		35,000.	0.
f 35,000.		35,000.	0.
g 35,000.		35,000.	0.
h			
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			0.
b			0.
c			0.
d			0.
e			0.
f			0.
g			0.
h			
i			
j			
k			
l			
m			
n			
o			

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

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
GFM, INC.	870,105.	0.	870,105.
HILLIARD LYONS	46,947.	0.	46,947.
MORGAN STANLEY SMITH BARNEY	6,723.	0.	6,723.
TOTAL TO FM 990-PF, PART I, LN 4	923,775.	0.	923,775.

FORM 990-PF OTHER INCOME STATEMENT 2

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
INVESTMENT INCOME OTHER THAN DIVIDENDS AND INTEREST	1,146.	1,146.	
TOTAL TO FORM 990-PF, PART I, LINE 11	1,146.	1,146.	

FORM 990-PF TAXES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX	2,940.	0.		0.
FOREIGN TAX ON DIVIDENDS	718.	0.		0.
TO FORM 990-PF, PG 1, LN 18	3,658.	0.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ANNUAL REPORT FEE	40.	0.		0.	
ATTORNEY FEES	9,760.	0.		0.	
ACCOUNTING FEES	2,135.	0.		0.	
INVESTMENT FEES	95.	95.		0.	
TO FORM 990-PF, PG 1, LN 23	12,030.	95.		0.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	5
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
GFM, INC.	1,219,814.	1,219,814.		
HILLIARD LYONS - MUTUAL FUNDS	1,754,714.	1,754,714.		
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,974,528.	2,974,528.		

FORM 990-PF	CORPORATE BONDS		STATEMENT	6
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
HILLIARD LYONS - FIXED INCOME	857,891.	857,891.		
TOTAL TO FORM 990-PF, PART II, LINE 10C	857,891.	857,891.		

FORM 990-PF	OTHER INVESTMENTS		STATEMENT	7
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
SMITH BARNEY	FMV	0.	0.	
TOTAL TO FORM 990-PF, PART II, LINE 13		0.	0.	

FORM 990-PF	TRANSFERS FROM CONTROLLED ORGANIZATIONS	STATEMENT	8
	PART VII-A, LINE 11A		

NAME OF CONTROLLED ENTITY

EMPLOYER ID NO

GFM, INC.

62-0352375

ADDRESS

6440 PAPERMILL DRIVE
KNOXVILLE, TN 37919

DESCRIPTION OF TRANSFER

DIVIDENDS IN THE AMOUNT OF \$870,105.
CASH DONATIONS IN THE AMOUNT OF \$136,485.

AMOUNT
OF TRANSFER

870,105.

TOTAL AMOUNT OF TRANSFERS FROM CONTROLLED ORGANIZATIONS

870,105.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 9
TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
RON CUNNINGHAM P.O. BOX 1 KNOXVILLE, TN 37901	PRESIDENT 1.00	0.	0.	0.
WILLIAM E. MONDAY III 208 BUSBEE ROAD KNOXVILLE, TN 37920	VICE PRESIDENT/ DIRECTOR 1.00	0.	0.	0.
KENNETH W. HOLBERT P.O. BOX 1 KNOXVILLE, TN 37901	TREASURER 1.00	0.	0.	0.
JOAN VESTAL ELLIS 7914 GLEASON DR, APT. 1053 KNOXVILLE, TN 37919	SECRETARY 1.00	0.	0.	0.
JAMES S. MONDAY 208 BUSBEE ROAD KNOXVILLE, TN 37920	DIRECTOR 0.00	0.	0.	0.
ROBERT W. MONDAY 902 KERMIT DRIVE KNOXVILLE, TN 37912	DIRECTOR 0.00	0.	0.	0.
JOHN LACY, MD 1932 ALCOA HWY KNOXVILLE, TN 37920	DIRECTOR 0.00	0.	0.	0.
VEDA M. BATEMAN 3608 BLOW DRIVE KNOXVILLE, TN 37920	DIRECTOR 0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF

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

STATEMENT 10

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

RON CUNNINGHAM, PRESIDENT
P.O. BOX 1
KNOXVILLE, TN 37901

TELEPHONE NUMBER

865-525-0238

FORM AND CONTENT OF APPLICATIONS

SEE THE ATTACHED GRANT APPLICATION FORM.

ANY SUBMISSION DEADLINES

APPLICATIONS ARE DUE JULY 1, BUT ARE ACCEPTED IF REC'D BEFORE THE GRANTS
COMMITTEE MEETING IN SEPT.

RESTRICTIONS AND LIMITATIONS ON AWARDS

AWARDS MUST BE USED FOR CHARITABLE, RELIGIOUS OR EDUCATIONAL PURPOSES. SEE
THE ATTACHED GRANT APPLICATION FORM.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 11

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
CANDORA ARTS & HERITAGE CENTER, INC. POST OFFICE BOX 9473 KNOXVILLE, TN 37940	NONE FUNDING TO PROVIDE SUPPORT STAFF ASSISTANCE	PUBLIC CHARITY	6,000.
EAST TENNESSEE CHILDREN'S HOSPITAL POST OFFICE BOX 15010 KNOXVILLE, TN 37916	NONE HOME HEALTH SERVICES FUND AND MEAL FUND	PUBLIC CHARITY	10,000.
EAST TENNESSEE HISTORICAL SOCIETY POST OFFICE BOX 1629 KNOXVILLE, TN 37901	NONE SUPPLEMENTAL FUNDING FOR FADING REMNANTS OF APPALACHIAN CULTURE	PUBLIC CHARITY	14,900.
BOYS & GIRLS CLUB OF THE TN VALLEY 220 CARRICK ST. KNOXVILLE, TN 37917	NONE ENHANCE THE LIVES OF YOUTHS	PUBLIC CHARITY	15,000.
BOYS & GIRLS CLUB OF THE TN VALLEY 120 CARRICK STREET KNOXVILLE, TN 37917	NONE ACTIVITIES BUILDING AT CASWELL AVE CLUB	PUBLIC CHARITY	10,000.
CHERISH THE CHILD FOUNDATION P.O. BOX 4391 SEVIERVILLE, TN 37864	NONE SUPPLEMENTAL FUNDING FOR DRUG ABUSE MATERIALS	PUBLIC CHARITY	10,000.
CHILD & FAMILY TN 901 EAST SUMMIT HILL DRIVE KNOXVILLE, TN 37915	NONE SHELTER TO DOM. VIOLENCE VICTIMS	PUBLIC CHARITY	7,500.
LADIES OF CHARITIES 1031 N. CENTRAL STREET KNOXVILLE, TN 37917	NONE PROVIDE PROPER NUTRITION TO HUNGRY ADULTS AND CHILDREN	PUBLIC CHARITY	5,000.

. GENE & FLORENCE MONDAY FOUNDATION, INC.			62-1518306
LOVE KITCHEN 2418 MARTIN LUTHER KING JR. AVE KNOXVILLE, TN 37915	NONE FUNDING TO FEED THE NEEDY	PUBLIC CHARITY	5,000.
KNOXVILLE AREA URBAN LEAGUE 1514 E. FIFTH AVENUE KNOXVILLE, TN 91917	NONE IMPROVE EDUCATIONAL OPPORTUNITIES FOR AFRICAN-AMERICAN STUDENTS	PUBLIC CHARITY	3,500.
FAMILY CARE FOUNDATION 1373 MARRON VALLEY ROAD KNOXVILLE, TN 37917	NONE HUMANITARIAN RELIEF WORLDWIDE FOR NEEDY FAMILIES	PUBLIC CHARITY	9,000.
IJAMS NATURE CENTER P.O. BOX 20518 KNOXVILLE, TN 37940	NONE SCHOOL BASED EDUCATIONAL PROGRAMS	PUBLIC CHARITY	5,000.
KNOXVILLE ACADEMY OF MEDICINE 115 SUBURBAN ROAD KNOXVILLE, TN 37923	NONE PROVIDE HEALTH CARE FOR UNINSURED LOW INCOME RESIDEN	PUBLIC CHARITY	10,000.
KNOXVILLE HABITAT FOR HUMANITY 1501 WASHINGTON AVE KNOXVILLE, TN 37917	NONE FUNDING FOR SIMPLE, DECENT AFFORDABLE HOUSING FOR LOW INCOME FAMILIES	PUBLIC CHARITY	12,800.
MENTAL HEALTH ASSOCIATION OF EAST TN P.O. BOX 32731 KNOXVILLE, TN 37931	NONE YOUTH SUICIDE PREVENTION PROGRAM	PUBLIC CHARITY	10,000.
MONTGOMERY VILLAGE CHILD DEVELOPMENT CENTER 1600 WILLOUGHBY ROAD KNOXVILLE, TN 37920	NONE PARTIAL TUITION - FEE SCHOLARSHIPS FOR DISADVANTAGED CHILDREN	PUBLIC CHARITY	7,500.
NATIONAL KIDNEY FOUNDATION SERVING 4450 WALKER BLVD. SUITE 2 KNOXVILLE, TN 37917	NONE ASSIST LOW INCOME FAMILIES WITH TRANSPORTAION FOR DI	PUBLIC CHARITY	5,000.
OPEN ARMS MINISTRY P.O. BOX 433 CARYVILLE, TN 37714	NONE SHELTER AND FOOD FOR NEEDY	PUBLIC CHARITY	10,000.

STEPS HOUSE, INC. 712 OGGS AVENUE KNOXVILLE, TN 37920	NONE FUNDING TOWARDS RESIDENT EMERGENCY FUND	PUBLIC CHARITY	5,000.
SECOND HARVEST FOOD BANK OF EAST TN 922 DELAWARE AVE KNOXVILLE, TN 37921	NONE SUPPORT NEEDY WITH FOOD, CLOTHING, AND SHELTER	PUBLIC CHARITY	10,000.
SERTOMA CENTER 1400 E. FIFTH AVENUE KNOXVILLE, TN 37917	NONE SUPPORT ADULTS WITH MENTAL RETARDATION	PUBLIC CHARITY	10,000.
SHANGRI-LA THERAPEUTIC ACADEMY OF RIDING 11800 HIGHWAY 11E LENOIR CITY, TN 37772	NONE HORSE RELATED ACTIVITIES FOR PERSONS WITH DISABILITIES	PUBLIC CHARITY	1,500.
SOAR YOUTH MINISTRIES P.O. BOX 51611 KNOXVILLE, TN 37950	NONE SUPPORT MIDDLE SCHOOL "PILOT" PROGRAM	PUBLIC CHARITY	15,000.
YOKE YOUTH MINISTRIES 1401 CECIL AVENUE KNOXVILLE, TN 37927	NONE UNDERWRITE REQUIREMENT AND TRAINING OF VOLUNTEERS	PUBLIC CHARITY	10,000.
VOLUNTEER MINISTRY CENTER 103 S. GAY STREET KNOXVILLE, TN 37901	NONE SUPPORT PROGRAMS FOR THE HOMELESS	PUBLIC CHARITY	15,000.
WESTLY HOUSE COMMUNITY CENTER 923 DAMERON AVE KNOXVILLE, TN 37921	NONE SUPPLEMENTAL FUNDING FOR CARE PROGRAM	PUBLIC CHARITY	4,800.
JUNIOR ACHIEVEMENT OF EAST TENNESSEE, INC. 2135 NORTH CHARLES G. SEIVERS BLVD CLINTON, TN 37716	NONE TEACH YOUNG PEOPLE ABOUT BUSINESS, ECONOMICS, AND FREE ENTERPRISE	PUBLIC CHARITY	2,500.
WEST END ACADEMY 5311 MCKAMEY ROAD KNOXVILLE, TN 37921	NONE SCHOLARSHIP ASSISTANCE	PUBLIC CHARITY	10,000.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

240,000.

GRANT APPLICATION FORM

ORGANIZATION: _____
ADDRESS: _____
NAME OF CONTACT _____
PERSON: _____ TITLE _____ TELEPHONE _____

GRANT REQUESTED IN THE AMOUNT OF \$ _____ IS TO BE USED FROM _____ TO _____ FOR
SERVICES IN THE FOLLOWING CATEGORY (PLEASE CHECK)

- _____ A CHARITABLE
_____ PROMOTE NON-SMOKING, NON-DRINKING, NO DRUGS PROGRAMS
_____ ASSIST NEEDY WITH FOOD, CLOTHING, SHELTER AND EMPLOYMENT
_____ ENCOURAGE CHILDREN & YOUTH IN BASIC MORAL VALUES
_____ HELP RELIEVE SUFFERING BEYOND OUR IMMEDIATE GEOGRAPHICAL AREA
_____ OTHER (Specify) _____
- _____ B RELIGIOUS
_____ C EDUCATIONAL

PLEASE ATTACH TO THIS APPLICATION THE FOLLOWING INFORMATION IN SUPPORT OF YOUR REQUEST

- 1 A PROGRAM DESCRIPTION INCLUDING NEED FOR FUNDS, OF HOW THESE FUNDS WILL BE USED AND THE POPULATION TO BE HELPED
- 2 BUDGET FOR THE PROGRAM
- 3 CURRENT FINANCIAL REPORT
- 4 AUDIT FOR MOST RECENT FISCAL YEAR
- 5 LIST OF BOARD MEMBERS AND OFFICERS OF THE APPLICANT ORGANIZATION
- 6 COPY OF MINUTES OF BOARD MEETING AUTHORIZING SUBMISSION OF APPLICATION
- 7 COPY OF LETTER OF DETERMINATION OF TAX EXEMPT STATUS UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE.
- 8 COPY OF IRS REPORT 990, "REPORT OF ORGANIZATION EXEMPT FROM INCOME TAX" FOR PREVIOUS FISCAL YEAR
- 9 COPY OF SOLICITATION PERMITS FROM CITY OF KNOXVILLE AND TENNESSEE SECRETARY OF STATE (IF APPROPRIATE)
- 10 MOST RECENT ANNUAL REPORT

UNDERSTANDING AND COMMITMENT

IN MAKING THIS APPLICATION WE UNDERSTAND AND AGREE THAT SHOULD OUR REQUEST BE APPROVED WE WILL

- A REPAY ANY AMOUNT NOT USED FOR THE PURPOSES OF THE GRANT
- B SUBMIT FULL AND COMPLETE ANNUAL REPORTS ON THE MANNER IN WHICH THE FUNDS ARE SPENT AND THE PROGRESS OF THE GRANT
- C KEEP RECORDS OF RECEIPTS AND EXPENDITURES AND MAKE BOOKS AND RECORDS AVAILABLE TO THE GRANTOR AT REASONABLE TIMES
- D NOT USE ANY OF THE FUNDS TO
INFULGENCE LEGISLATION,
INFLUENCE THE OUTCOME OF ELECTIONS,
CARRY ON VOTER REGISTRATION DRIVES,
MAKE GRANTS TO INDIVIDUALS OR OTHER ORGANIZATIONS, OR
UNDERTAKE ANY NON-EXEMPT ACTIVITY

CERTIFICATION

THIS IS TO CERTIFY THAT THE INFORMATION INCLUDED IN THIS REQUEST IS TRUE AND COMPLETE TO THE BEST OF MY KNOWLEDGE.
IF APPROVED, THE GRANT WILL BE USED AS APPLIED FOR

DATE _____

SIGNATURE _____

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 GENE & FLORENCE MONDAY FOUNDATION, INC.	Employer identification number 62-1518306
	Number, street, and room or suite no. If a P.O. box, see instructions. 1810 AILOR AVENUE	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. KNOXVILLE, TN 37921	

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

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

KENNETH W. HOLBERT

- The books are in the care of ► **1810 AILOR AVENUE - KNOXVILLE, TN 37921**
Telephone No. ► **(865) 525-0238** 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	\$	12,620.
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	\$	4,120.
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	\$	8,500.

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)

SCANNED
Date 5-18-10
By AM