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Form **990-PF**

Department of the Treasury Internal Revenue Service

For calendar year 2009, or tax year beginning

Add lines 24 and 25

Printing and publications

Travel, conferences, and meetings

Other expenses (attach schedule)

Contributions, gifts, grants paid Part XV

Total expenses and disbursements.

C Adjusted net income (if negative, enter -0-)

24 Total operating and administrative expenses. Add lines 13 through 23

21

EXPENS 23

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

Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements

, 2009, and ending

OMB No 1545-0052

2009

| G Che | ck all that apply: Initial return Init | tial Return of a former pi | ublic charity | ☐ Fina | al return |
|------------|---|---|--|---|---|
| | Amended return | Address of | change Name o | change | |
| llse th | | | Α | Employer identification nun | nber |
| | | rivate | | 62-1733598 | |
| | 1 I Odiida Citori | В | Telephone number (see the | instructions) | |
| | (1/21 nelbell avenue/ FO | | | 949-633-8761 | |
| See Spe | sific Salt Lake City, UT 84158 | | C | | pending, check here |
| Instructi | ons. | D | 1 Foreign organizations, chec | k here | |
| H C | neck type of organization: X Section 50 | 1(c)(3) exempt private for | | 2 Foreign organizations meet | ing the 85% test, check |
| Ϊ | | | orivate foundation | here and attach computation | in ¯ |
| I Fa | r market value of all assets at end of year J Ac | | | | |
| (fi | om Part II, column (c), line 16) | Other (specify) | _F | , ,, ,, , | |
| ▶\$ | | , column (d) must be on | | | |
| Part I | | (a) Revenue and | (h) Net investment | (c) Adjusted net | (d) Disbursements |
| | Expenses (The total of amounts in | evnenses ner hooks | income | income | for charitable |
| | columns (b), (c), and (d) may not neces- sarily equal the amounts in column (a) | | | | purposes (cash basis only) |
| | (see the instructions)) | | | | , |
| _ | | | <u> </u> | | |
| | | <u> </u> | ` | <u> </u> | |
| | 3 Interest on savings and temporary cash investments | | | | |
| | 4 Dividends and interest from securities | 2,020. | 2,020. | | · · · · · · · · · · · · · · · · · · · |
| | 5a Gross rents . | | | | |
| | D Net rental income or (loss) | 1.3 | | | |
| Ŗ | 6a Net gain/(loss) from sale of assets not on line 10 | | L.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | | |
| | assets on line 6a 13,835. | | I | | |
| Ē | | | | | |
| ü | , g | h | *····· | | |
| Ě | 10 a Gross sales less | | | 2 2 222 | K |
| | allowances | 18.03 | \$ `\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\ | · · · · · · · · · · · · · · · · · · · | |
| | b Less Cost of goods sold | 1 1 1 1 1 1 1 | | | |
| | <u> </u> | | | | 3 |
| | 11 Other income (attach schedule). | | | | |
| | | | | | 1 11 11 11 11 11 |
| | 12 Total. Add lines 1 through 11 | | 5,172. | 0. | 16 |
| | | 0. | | | |
| | | | | | |
| _ | | | | DE | CEIVED |
| D | | 480 | 480 | | PEINFD |
| | | 400. | 400. | | 181 |
| | • | | | HE MAY | 172010 101 |
| PS | | | | 1 1 1 - | 3 |
| RRA | 19 Depreciation (attach | | | 1 | |
| ii | sch) and depletion | | | L UGI | EN UT |
| N Ý G E | 20 Occupancy | | - | | |
| | Use the IRS labe Otherwise print or type See Special Instruction H Cr REVENUE ADMINITERATION OPPERATION OPPERATION | Use the IRS label. Otherwise, prints or type. See Specific Instructions. H Check type of organization: X Section 50 Section 4947(a)(1) nonexempt charitable to Salt Lake City, UT 84158 I Fair market value of all assets at end of year (from Part II, column (c), line 16) Section 4947(a)(1) nonexempt charitable to Tair market value of all assets at end of year (from Part II, column (c), line 16) Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions)) 1 Contributions, gifts, grants, etc, received (att sch) 2 Ck X if the founds is not req to att Sch B 3 Interest on savings and temporary cash investments 4 Dividends and interest from securities 5a Gross rents b Net granificacy from sale of assets not on line 10 b Gross sales price for all assets on line 6a 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain 9 Income modifications 10 a Gross sales less returns and allowances b Less Cost of goods sold c Gross profit/(loss) (att sch) 11 Other income (attach schedule) Total. Add lines 1 through 11 13 Compensation of officers, directors, trustees, etc 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees (attach schedule) D Total. Add lines 2 through 12 Total. Add lines 3 through 13 17 Interest 18 Tazes (attach schedule) b Accounting fees (attach sch) 17 Interest 18 Tazes (attach schedule)(see instr.) 19 Depreciation (attach sch.) 19 Depreciation (attach sch.) 10 Depreciation (attach sch.) 20 Occupancy | Use the IRS label. Otherwise, print or type. See Specific Instructions. H Check type of organization: X Section 501(c)(3) exempt private from Part II, column (c), line 16) Section 4947(a)(1) nonexempt charitable trust Other taxable real from Part II, column (c), line 16) Section 4947(a)(1) nonexempt charitable trust Other taxable real from Part II, column (c), line 16) Tarm market value of all assets at end of year (from Part II, column (c), line 16) Tarm arket value of all assets at end of year (from Part II, column (c), line 16) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all assets at end of year (location) Other (specify) Tarm arket value of all | Name Name | Use the Use |

Subtract line 26 from line 12: a Excess of revenue over expenses 701 and disbursements 200 4,451 **b** Net investment income (if negative, enter -0-) 0. æ,

241

721

750

471

BAA For Privacy Act and Paperwork Reduction Act Notice, see the instructions.

See Statement 2

TEEA0504L 02/02/10

241

721

721

0

Form 990-PF (2009)

3,750.

750

| Form | 990- | PF (2009) John L & Ardis J Piers Private | 62-173 | 62-1733598 Page 2 | | | |
|-------------------------|---------|---|---------------------------|---------------------------------------|-----------------------|--|--|
| | 850.53 | Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only | Beginning of year | End o | of year | | |
| 131 | M. | Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions) | (a) Book Value | (b) Book Value | (c) Fair Market Value | | |
| | 1 | Cash - non-interest-bearing | | 4,197. | 4,197. | | |
| | 2 | Savings and temporary cash investments . | | | | | |
| | 3 | Accounts receivable | | | Li Shanda ak Bu | | |
| | | Less: allowance for doubtful accounts | | | | | |
| | 4 | Pledges receivable . | | . 1 1, " . " . " . " | | | |
| | | Less: allowance for doubtful accounts | | | | | |
| | 5 | Grants receivable | | | | | |
| | 6 | Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions) | | | | | |
| | 7 | Other notes and loans receivable (attach sch) | 17. 17 | | | | |
| Ą | | Less: allowance for doubtful accounts | | | | | |
| A S E T | 8 | Inventories for sale or use | | | | | |
| Ę | 9 | Prepaid expenses and deferred charges | | | | | |
| Ś | 10 a | n Investments – U.S. and state government obligations (attach schedule) | | | | | |
| | 1 | Investments — corporate stock (attach schedule) | 66,746. | 63,215. | 70,789. | | |
| | | Investments — corporate bonds (attach schedule) | | | | | |
| | 11 | Investments – land, buildings, and equipment: basis | | | | | |
| | | Less: accumulated depreciation (attach schedule) | | | | | |
| | 12 | Investments – mortgage loans | | | | | |
| | 13 | Investments - other (attach schedule) | | | | | |
| | 14 | Land, buildings, and equipment: basis ► | . * | | E #WE!! | | |
| | | Less accumulated depreciation (attach schedule) | | | | | |
| | | Other assets (describe) | | | | | |
| | 16 | Total assets (to be completed by all filers — see instructions. Also, see page 1, item I) | 66,746. | 67,412. | 74,986. | | |
| 一 | 17 | Accounts payable and accrued expenses. | 00,740. | 0,,112. | 71/300. | | |
| Į | 18 | Grants payable | | | | | |
| A B I | 19 | Deferred revenue | | | | | |
| . ! | 20 | Loans from officers, directors, trustees, & other disqualified persons | | | | | |
| ī | 21 | Mortgages and other notes payable (attach schedule) | | | | | |
| Ţ | 22 | Other liabilities (describe) | | | | | |
| Ė | | | _ | | | | |
| <u>_s</u> | 23 | Total liabilities (add lines 17 through 22) | 0. | 0. | | | |
| | | Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. | | | | | |
| N F E U | 24 | Unrestricted | 66,746. | 67 <u>,412</u> . | | | |
| TN | 25 | Temporarily restricted | | · · · · · · · · · · · · · · · · · · · | | | |
| , D | 26 | Permanently restricted | | | | | |
| A S B S A | | Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. | | | | | |
| EL | 27 | Capital stock, trust principal, or current funds | | | | | |
| SN | 28 | Paid-in or capital surplus, or land, building, and equipment fund. | | | | | |
| OE | 29 | Retained earnings, accumulated income, endowment, or other funds | | | | | |
| RS | 30 | Total net assets or fund balances (see the instructions). | 66,746. | 67,412. | | | |
| | 31 | Total liabilities and net assets/fund balances | 66,746. | 67,412. | | | |
| Dar | 1 1 1 1 | (see the instructions) Analysis of Changes in Net Assets or Fund Balance | | 07,412. | <u> </u> | | |
| | | | | | T | | |
| 1 | I otal | l net assets or fund balances at beginning of year — Part II, colur of-year figure reported on prior year's return) | mn (a), line 30 (must agi | ree with | 66,746. | | |
| 2 | | r amount from Part I, line 27a | | 2 | 701. | | |
| 3 | | increases not included in line 2 (itemize) | | 3 | | | |
| 4 Add lines 1, 2, and 3 | | | | | | | |
| 5 | | ases not included in line 2 (itemize) See Statement | 3 | 5 | 35. | | |
| 6 | | I net assets or fund balances at end of year (line 4 minus line 5) | | ne 30 6 | 67,412. | | |
| DAA | | | | | E 000 DE (0000) | | |

| (a) List and describe 2-story brick warehous | the kınd(s) of property sold (e.g., rea e; or common stock, 200 shares MLC | Company | D) How acquired P — Purchase D — Donation | (C) Date acquired (month, day, year) | (d) Date sold (month, day, year |
|---|---|--|---|---|------------------------------------|
| 1a.875 Phizer Incorpo | rated | | P | 10/16/09 | 10/16/09 |
| b 275 Wyeth | racca | | <u>P</u> | 4/14/04 | 10/16/09 |
| c | | | | | |
| d | | | | | |
| е | | | | · | |
| (e) Gross sales price | (f) Depreciation allowed (or allowable) | (g) Cost or other basis plus expense of sale | | (h) Gain or (e) plus (f) m | |
| a 15. | | | 15. | | 0 |
| ь 13,820. | | 10, | 668. | | 3,152 |
| С | | | | | |
| d | | | | | |
| <u>e</u> | | | | | |
| | g gain in column (h) and owned by the | | | (I) Gains (Colu | ımn (h) |
| (i) Fair Market Value as of 12/31/69 | (i) Adjusted basis as of 12/31/69 | (k) Excess of column (i) over column (j), if any | | gain minus column (l ian -0-) or Losses (fr | |
| a b | | | <u> </u> | | 0 3,152 |
| C | | | | | 3,132 |
| d | | | | | |
| e | | | | | |
| 2 Capital gain net income or (net o | apital loss). | nter in Part I, line 7 | 2 | | 3,152 |
| 3 Net short-term capital dain or (lo | ss) as defined in sections 1222(5) and | • | | | 3,132 |
| , , , | , | ·· — | | | |
| If gain, also enter in Part I, line 8 in Part I, line 8 | 3, column (c) (see the instructions). If | (loss), enter -0- | 3 | | 0 |
| | Section 4940(e) for Reduced | Tax on Net Investmen | | | . |
| 'Yes,' the foundation does not qualify | on 4942 tax on the distributable amour v under section 4940(e). Do not compl | ete this part. | | Yes | X No |
| | each column for each year; see the in | | entries. | | |
| (a) Base period years Calendar year (or tax year beginning in) | (b) Adjusted qualifying distributions | (c) Net value of noncharitable-use assets | s (col | (d) Distributior umn (b) divided | |
| 2008 | 3,080. | 77, | 446. | | 0.03977 |
| 2007 | 4,788. | | 980. | | 0.05205 |
| 2006 | 4,300. | 86, | 633. | | 0.04963 |
| 2005 | 4,100. | 81, | 431. | | 0.05034 |
| 2004 | 3,700. | 73, | 924. | ···- | 0.05005 |
| 2 Total of line 1, column (d) | | | 2 | | 0.24186 |
| , , , | | | - | | <u> </u> |
| 3 Average distribution ratio for the number of years the foundation is | 5-year base period — divide the total on as been in existence if less than 5 years. | on line 2 by 5, or by the ars. | 3 | | 0.04837 |
| 4 Enter the net value of noncharita | ble-use assets for 2009 from Part X, I | ine 5 | 4 | | 68,750 |
| 5 Multiply line 4 by line 3 | | | 5 | | 3,326 |
| 6 Enter 1% of net investment incom | me (1% of Part I, line 27b) | | 6 | | 45 |
| 7 Add lines 5 and 6 | | | 7 | | 3,371 |
| 8 Enter qualifying distributions from | n Part XII, line 4 | | 8 | | 3,750 |
| If line 8 is equal to or greater that Part VI instructions. | n line 7, check the box in Part VI, line | e 1b, and complete that part t | using a 1% ta | x rate. See the | |

| Forn | 990-PF (2009) John L & Ardis J Piers Private | | | 52-: | <u> 1733</u> | 598 | | P | age 4 |
|------------|--|-----------------|--|---------------|------------------|------------|--------------|---------|------------|
| Par | Excise Tax Based on Investment Income (Section 4940(a), 4940 | (b), 4 | 1940(e), or 4948 — | see t | he ins | struction | ons) | | |
| 1 6 | Exempt operating foundations described in section 4940(d)(2), check here | A' on li | ine 1 | | | | Marie I | ; ; ; ' | s, es |
| | Date of ruling or determination letter. (attach copy of letter if necessary | - see | instr.) | | | | | | |
| ı | Domestic foundations that meet the section 4940(e) requirements in Part V, | | - | | 1_ | | | | <u>45.</u> |
| | check here ► X and enter 1% of Part I, line 27b | | 1 | | | . * 335 | g dige | | () |
| • | All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line | 12, co | lumn (b). | | | | m m Makan | | |
| 2 | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable | | | ĺ | | 14/1/11 | 111.5 | | |
| _ | foundations only. Others enter -0-) | | | Į. | 2 | | | | 0. |
| 3 | Add lines 1 and 2 | | | - [| 3 | | | | <u>45.</u> |
| 4 | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations of | only. | Others enter -0-) | ٠, | 4 | | | | <u>0.</u> |
| 5 | Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0 | 0- | | ļ | 5 | ********** | | | <u>45.</u> |
| 6 | Credits/Payments: | | | | | 16. | | | |
| á | 2009 estimated tax pmts and 2008 overpayment credited to 2009 | 6a | | | | | | 11. 11. | 1.3 |
| ŧ | Exempt foreign organizations — tax withheld at source | 6b | | | | 3393 | ₩ | | - 79.3 |
| • | Tax paid with application for extension of time to file (Form 8868) | 6c | | | | K.S. | | 48. L | , '' |
| • | Backup withholding erroneously withheld | 6d | | | | | | | |
| 7 | | | | ļ | _7_ | | | | 0. |
| 8 | Enter any penalty for underpayment of estimated tax. Check here if Form 2220 | 0 is a | allached | i | 8 | <u> </u> | | | |
| 9 | Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | | • | • | 9 | | | | <u>45.</u> |
| 10 | Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | | | • | 10 | | | | |
| 11 | Enter the amount of line 10 to be Credited to 2010 estimated tax | | Refunded | • | 11 | L | | | _ |
| Par | VII-A Statements Regarding Activities | | · · · · · · · · · · · · · · · · · · · | | | | | | |
| 1 <i>a</i> | During the tax year, did the foundation attempt to influence any national, state, or lo participate or intervene in any political campaign? | ocal le | egislation or did it | | | | 1a | Yes | No X |
| Ł | Did it spend more than \$100 during the year (either directly or indirectly) for political (see the instructions for definition)? | l purp | ooses | | | | 1 Ь | | Х |
| | If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and coor distributed by the foundation in connection with the activities | copies | s of any materials | publ | shed | | | : .: | |
| | Did the foundation file Form 1120-POL for this year? | | | | | | 1c | | X |
| • | Enter the amount (if any) of tax on political expenditures (section 4955) imposed dur | | he year: | | | _ | | `` | ì |
| | (1) On the foundation $\qquad \qquad \qquad$ | | nditure tay imposi | ad or | | 0. | | `` | |
| • | foundation managers \$ 0. | expe | iluliare lax impos | cu oi | • | | | | ì |
| 2 | Has the foundation engaged in any activities that have not previously been reported | l to th | ne IRS? | | | | 2 | ····· | x |
| | If 'Yes,' attach a detailed description of the activities | | | | | | | | 7. |
| 2 | Has the foundation made any changes, not provide the reported to the IDS, in its gay | ornir | a unetrument arti | cloc | | | | | 2.3 |
| 3 | Has the foundation made any changes, not previously reported to the IRS, in its gov of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conforme | ed cop | py of the changes | UIC3 | | | 3 | | X |
| 48 | Did the foundation have unrelated business gross income of \$1,000 or more during t | | | | | | 4a | | X |
| t | If 'Yes,' has it filed a tax return on Form 990-T for this year? | | | | | | 4b | N | /A |
| 5 | Was there a liquidation, termination, dissolution, or substantial contraction during the year? | | | | | | 5 | *** | X |
| | If 'Yes,' attach the statement required by General Instruction T | | | | | | | | , |
| 6 | Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfies | sfied | either: | | | | | | , , |
| | By language in the governing instrument, or | | | | | | | ×, | |
| | • By state legislation that effectively amends the governing instrument so that no ma with the state law remain in the governing instrument? | anda | tory directions tha | t cor | flict | | 6 | X | , ; |
| 7 | Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, colu | umn (c | c), and Part XV | | | | 7 | X | |
| 8 | Enter the states to which the foundation reports or with which it is registered (see th | ne ins | structions) | - _ | | _ | | | |
| | N/A | | | | | | | 3.2 | æ |
| ı | If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General | | | | | | | | iiba. |
| | (or designate) of each state as required by General Instruction G? If 'No,' attach explanation | | | | | | 8ь | X | |
| 9 | is the foundation claiming status as a private operating foundation within the meaning for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Pa | ng of art XI | section 4942(j)(3) V)? If 'Yes,' comp | or 4 olete | 942(j) Part . | (5) XIV | 9 | , \ | X |
| 10 | Did any persons become substantial contributors during the tax year? If 'Yes,' attack and addresses | h a s | schedule listing the | eir na | mes | | 10 | | X |

BAA

Form **990-PF** (2009)

| | n 990-PF (2009) John L & Ardis J Piers Private | 62- | <u> 173359</u> | 8 | Pag | ge 5 |
|-----|---|--------------------|----------------|----------------|----------------|---|
| Par | t VII-A Statements Regarding Activities Continued | | | | · · · · · · | |
| 11 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions) | | | 11 | | <u>X</u> |
| 12 | Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? | | | 12 | | <u>X_</u> |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption Website address. N/A | applicatio | n? | 13 | Х | |
| 14 | | ne no. ► | 949-6 | 33-8 | 761 | |
| | Located at ► 30421 Via Festivo San Juan Capistrano CA ZIP + 4 | 926 | <u>75</u> . | | | <u>-</u> |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here | 1 | 1 | N/A | | |
| | and enter the amount of tax-exempt interest received or accrued during the year | • | 15 | | N | <u>/A</u> |
| Kar | t VII-B Statements Regarding Activities for Which Form 4720 May Be Required | | | 18899 | Yes | No |
| 4. | File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies. | | | | 162 | , TO |
| 1 2 | a During the year did the foundation (either directly or indirectly): | Yes | XNo | | | : 48 |
| | (1) Engage in the sale or exchange, or leasing of property with a disqualified person? | □ res | MO | | | . ` !! |
| | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? | Yes | X No | | | 1 |
| | (3) Furnish goods, services or facilities to (or accept them from) a disqualified person? | Yes | X No | h. ha al | | 3 |
| | (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? | Yes | X 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 | X 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 | XNo | · · | | |
| Ł | 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 the instruction | ons)? | | 1b | N/2 | <u>A</u> |
| | Organizations relying on a current notice regarding disaster assistance check here. | • | | | | į. |
| • | 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 | | <u>X</u> _ |
| 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)): | | | | | |
| ā | 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 | XNo | 33.20 | | * |
| | If 'Yes,' list the years ► 20 , 20 , 20 | | | | | ` . |
| ŧ | b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942 (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942) all years listed, answer 'No' and attach statement — see the instructions.). | (a)(2) a)(2) to | | 2b | N/I | |
| • | c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years h 20, 20, 20, 20 | ere. | | | | |
| 3 | a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? | Yes | X No | | | `` |
| l | b If 'Yes,' did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approve 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) | d | | 3b | N/ | ``. . }`.] A |
| 4 | a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | | | 4a | | X |
| ı | 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 |
| BAA | A. | | F | orm 9 9 | 0-PF (2 | .009) |

| Form 990-PF (2009) John L & Ardis J E | | | | 7335 <u>9</u> | 8 Page 6 |
|---|--|--|--|---------------|------------------------------------|
| Part VII-B Statements Regarding Activit | ies for Which Forr | n 4720 May Be Rec | uired (continued | d) | |
| 5a During the year did the foundation pay or incur | · · · · · · · · · · · · · · · · · · · | | | _ | |
| (1) Carry on propaganda, or otherwise attemp | t to influence legislation | (section 4945(e))? | ∐ Yes ∐ | X No | |
| (2) Influence the outcome of any specific publion, directly or indirectly, any voter registra | ic election (see section tion drive? | 4955), or to carry | Yes | X No | |
| (3) Provide a grant to an individual for travel, | | ourposes? | Yes | X No | |
| (4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section (4) | an a charitable, etc, or 4940(d)(2)? (see instruc | ganization described ctions) | . Yes | X No | |
| (5) Provide for any purpose other than religious educational purposes, or for the prevention | us, charitable, scientific, n of cruelty to children o | , literary, or or animals? | Yes | X 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)? | | | | | 5b N/A |
| Organizations relying on a current notice regar | ding disaster assistance | e check here | ► { | | |
| c If the answer is 'Yes' to question 5a(4), does to tax because it maintained expenditure responsing 'Yes,' attach the statement required by Regulations. | sibility for the grant? | | N/A Yes [| No | |
| 6a Did the foundation, during the year, receive an on a personal benefit contract? | y funds, directly or indi | rectly, to pay premiums | Yes | XNo | |
| b Did the foundation, during the year, pay premit | ums, directly or indirect | ly, on a personal benefi | t contract? | - | 6b X |
| 7a At any time during the tax year, was the found | ation a party to a prohit | oited tax shelter transac | tion? Yes | X No | |
| b If yes, did the foundation receive any proceeds | | | | _ | 76 N/A |
| Part VIII Information About Officers, D | | | | d Emp | loyees, |
| and Contractors | | | | | |
| 1 List all officers, directors, trustees, foundation | | | | | · |
| (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 | ot | xpense account, her allowances |
| Susan Taylor | Secretary | 0. | 0 | . [| 0. |
| 30421 Via Festivo | 0 | | | | |
| San Juan Capistrano, CA 92675 | | | | _ | |
| Mary Rae Hunter | President | 0. | 0 | . | 0. |
| 3205 Westover Road | 0 | | | | |
| Durham, NC 27707 | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| 2 Compensation of five highest-paid employees | (other than those inclu | | | | |
| (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 | ot | Expense account, her allowances |
| None | | | | | |
| | | | | + | |
| | | | | _ | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| Total number of other employees paid over \$50,000 | | 270000 | | F. | 0.cm 990-PF (2009) |

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|--|--------------|---------------|
| Part X Minimum Investment Return (All domestic foundations must complete this part. F see instructions.) | oreign found | |
| 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 | 67,699. |
| b Average of monthly cash balances . | 1 b | 2,098. |
| c Fair market value of all other assets (see instructions) | 1c | |
| d Total (add lines 1a, b, and c) . | 1d | 69,797. |
| 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 | 69,797. |
| 4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions) | 4 | 1,047. |
| 5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4 | 5 | 68,750. |
| 6 Minimum investment return. Enter 5% of line 5 | 6 | 3,438. |
| Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private oper and certain foreign organizations check here ► ☐ and do not complete this part XI ☐ and | | |
| 1 Minimum investment return from Part X, linc 6 | 1 | 3,438. |
| 2a Tax on investment income for 2009 from Part VI, line 5 | | |
| b Income tax for 2009. (This does not include the tax from Part VI.) | | |
| c Add lines 2a and 2b | 2c | 45. |
| 3 Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 3,393. |
| 4 Recoveries of amounts treated as qualifying distributions | 4 | |
| 5 Add lines 3 and 4 | 5 | 3,393. |
| 6 Deduction from distributable amount (see instructions) | 6 | |
| 7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | 7 | 3,393. |
| 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 | 3,750. |
| b Program-related investments — total from Part IX-B | 1 b | |
| 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 | |

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.

4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4

Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)

BAA

b Cash distribution test (attach the required schedule)

6 Adjusted qualifying distributions. Subtract line 5 from line 4

Form **990-PF** (2009)

3,750.

45. 3,705.

3a 3b

4

5

6

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 | | | | 3,393. |
| 2 Undistributed income, if any, as of the end of 2009: | | | | |
| a Enter amount for 2008 only | 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 | N 33 2 4 12 13 | 304. | |
| b Total for prior years: 20, 20, 20 | | 0. | | |
| 3 Excess distributions carryover, if any, to 2009: | | angan J. M. William War v. V. V. V. V. V. V. | | |
| a From 2004 | | | | |
| 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: ► \$ 3,750. | | | | |
| a Applied to 2008, but not more than line 2a | | | 304. | |
| b Applied to undistributed income of prior years | 2. 3. 2. 3. 3. 3. 3. 3. 3. 3. 3. 3. 3. 3. 3. 3. | | | |
| (Election required – see instructions) | <u> </u> | 0. | | |
| Treated as distributions out of corpus (Election required — see instructions) | 0. | | | |
| d Applied to 2009 distributable amount | 1 27 13 1 1 | 11 1 1 1 1 1 1 1 1 1 | | 3,393. |
| e Remaining amount distributed out of corpus | 53. | Ą | | |
| 5 Excess distributions carryover applied to 2009 | 0. | | | 0. |
| (If an amount appears in column (d), the same amount must be shown in column (a)) | | | | |
| Same amount must be snown in column (a) | , , , | | and the state of t | |
| 6 Enter the net total of each column as | | | | |
| indicated below: | | | | |
| a Corpus. Add lines 3f, 4c, and 4e Subtract line 5 | 53. | 1, 344 | | |
| b Prior years' undistributed income. Subtract line 4b from line 2b | | 0. | | |
| c Enter the amount of prior years' undistribut- | | | | |
| ed income for which a notice of deficiency has been issued, or on which the section | | | | |
| 4942(a) tax has been previously assessed | 355 11 11 11 | 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 instructions | 3 3 3 | | 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) | | | | |
| (see instructions). | 0. | , | | |
| 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions) | 0. | | | |
| 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a | 53. | | | |
| 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 53. | 8 3 3 3 4 | | Kamarat Campu | 10 m m |

| Form 990-PF (2009) John L & Ardis J | Piers Priva | t <u>e</u> | | 62-1733598 | Page 10 | |
|--|---|--|--|--------------------------|-----------------|--|
| Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A | | | | | | |
| 1a If the foundation has received a ruling or on its effective for 2009, enter the date of the | determination letter ruling | that it is a private of | perating foundation | • | 4942(j)(5) | |
| | x to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or | | | | | |
| 2a Enter the lesser of the adjusted net income from Part I or the minimum | Tax year | | Prior 3 years | 1 B 0005 | | |
| investment return from Part X for each year listed | (a) 2009 | (b) 2008 | (c) 2007 | (d) 2006 | (e) Total | |
| b 85% of line 2a | | | | | | |
| c Qualifying distributions from Part XII, line 4 for each year listed | | | | | | |
| d Amounts included in line 2c not used directly for active conduct of exempt activities | | | | | | |
| Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c | | | | | | |
| 3 Complete 3a, b, or c for the alternative test relied upon: | | | | | | |
| a 'Assets' alternative test — enter: | | | | | | |
| (1) Value of all assets. | | | | | | |
| (2) Value of assets qualifying under section 4942(j)(3)(B)(i) | | <u> </u> | | | | |
| b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed | | | | | | |
| c 'Support' alternative test - enter: | | | | | | |
| (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties). | | | | | | |
| (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(III) | | | | | | |
| (3) Largest amount of support from an exempt organization | | | | | | |
| (4) Gross investment income | <u></u> | | | | | |
| Part XV Supplementary Information assets at any time during to | (Complete this he year – see ir | part only if the structions.) | organization l | nad \$5,000 or mo | ore in | |
| Information Regarding Foundation Managera List any managers of the foundation who is close of any tax year (but only if they have Susan Taylor | have contributed mo | ore than 2% of the to than \$5,000). (See s | otal contributions re section 507(d)(2).) | ceived by the founda | tion before the | |
| b List any managers of the foundation who a partnership or other entity) of which the None | own 10% or more of foundation has a 10 | the stock of a corp 1% or greater interes | oration (or an equa st. | lly large portion of the | e ownership of | |
| 2 Information Regarding Contribution, Gran | t. Gift. Loan. Schola | ership, etc. Program | | | | |
| Check here I I if the foundation only requests for funds. If the foundation make complete items 2a, b, c, and d. | nakes contributions | to preselected char | itable organizations | | | |
| a The name, address, and telephone number | er of the person to v | vhom applications s | hould be addressed | 1: | | |
| | | | | | | |
| See Statement 4 | | | | | | |
| b The form in which applications should be | submitted and inforr | mation and material | s they should includ | de: | | |
| See Statement for Line 2a | | <u>.</u> | | | _ | |
| c Any submission deadlines. | | | | | | |
| See Statement for Line 2a | | | | | | |
| d Any restrictions or limitations on awards, | such as by geograp | hical areas, charitat | ole fields, kinds of i | nstitutions, or other fa | actors: | |
| See Statement for Line 2a | | | · | <u>-</u> - | | |

| 404 South 400 West Salt Lake City, UT 84101 Durham Academy Development Office 3601 Ridge Road Durham, NC 27705 Rowland Hall St Mark's School 720 Guardsmann Way Care Support Education - Teachers and Enrichment 1,87 Education - 1,50 | 3 Grants and Contributions Paid During the Yea | r or Approved for Futu | re rayment | | |
|---|---|---|--------------------------------|----------------------------------|--------|
| a Paid during the year Fourth Street Clinic 404 South 400 West Salt Lake City, UT 84101 Durham Academy Development Office 3601 Ridge Road Durham, NC 27705 Rowland Hall St Mark's School 720 Guardsmann Way Salt Lake City, UT 94108 Total Community Health Care Support Leducation - Teachers and Enrichment Education - 1,50 Education - Educational Fund Total Fotal | | If recipient is an individual, show any relationship to any foundation manager or | Foundation status of recipient | Purpose of grant or contribution | Amount |
| Office 3601 Ridge Road Durham, NC 27705 Rowland Hall St Mark's School 720 Guardsmann Way Salt Lake City, UT 84108 Total | | Substantial contributor | | Community Health | 375 |
| Rowland Hall St Mark's School 720 Guardsmann Way Salt Lake City, UT 84108 Total Education - Educational Fund 1,50 | Durham Academy Development Office 3601 Ridge Road Durham, NC 27705 | | | | 1,875 |
| | Rowland Hall St Mark's School 720 Guardsmann Way Salt Lake City, UT 84108 | | | | 1,500 |
| | Total | <u> </u> | | <u> </u> | 3 750 |
| | | | | 54 | 3,730 |
| i i i i i i i i i i i i i i i i i i i | | | | | |

| nter gross | s amounts unless otherwise indicated. | Unrelat | ted business income | Excluded | by section 512, 513, or 514 | |
|--|---|-------------------------|---------------------------|-------------------------------|-----------------------------|--|
| | ram service revenue: | (a) Business code | (b) Amount | (c) Exclu- sion code | (d) Amount | (e) Related or exempt function income (see the instructions) |
| b c d e f g Fees 2 Memil 3 Interes 4 Divide 5 Net re a Debt- | and contracts from government agencies bership dues and assessments at on savings and temporary cash investments ends and interest from securities ental income or (loss) from real estate: financed property lebt-financed property | 3.3.3 | | 14 | 2,020. | |
| 6 Net rer7 Other8 Gain or9 Net in | ntal income or (loss) from personal property r investment income r (loss) from sales of assets other than inventory, ncome or (loss) from special events s profit or (loss) from sales of inventory | | | | | 3,152 |
| a b c | r revenue: | | | | | |
| e Subto | otal Add columns (b), (d), and (e) I. Add line 12, columns (b), (d), and (e), wheet in the instructions for line 13 to verify ca | alculations.) | | | 2,020. | 3,152 5,172 |
| | Relationship of Activities to th | e Accomp | | | | o the |
| N/A | Explain below how each activity for which in accomplishment of the foundation's exempt | t purposes (ott | ner than by providing fun | nds for suc | ch purposes). (See the | instructions.) |
| | | | | | | |

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Form 990-PF (2009) John L & Ardis J Piers Private 62-1733598 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

| des rela a Trai (1) (2) b Oth (1) (2) (3) (4) (5) c Sha | cribed in section 501 ting to political organisfers from the reportant cash of the repor | (c) of the Code (of nizations? Inting foundation to innoncharitable exerts from a noncharitate equipment, or other angements intees wices or membershipment, mailing list the above is 'Yes' to the a | ble exempt organization. | organizations) organizations of: | r in section 52/ | rs show the fair m | 1a (1) X 1a (2) X 1b (1) X 1b (2) X 1b (3) X 1b (4) X 1b (5) X 1c X arket value of value in i. |
|---|--|--|---|---|--|------------------------------|---|
| (a) Line no | | | f noncharitable exempt organiz | | | fers, transactions, and | |
| N/A | | | | | | | |
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| des | ne foundation directly cribed in section 501 (es,' complete the fo | (c) of the Code (ot | ted with, or related to, oner than section 501(c)(3 | ne or more tax-ex ()) or in section 52 | empt organizat 27? | ions | Yes XNo |
| | (a) Name of organ | | (b) Type of orga | nızatıon | (c) | Description of rel | ationship |
| N/A | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | | | | | · | | |
| Under percomplete | malties of perjury, I declare the Declaration of preparer (| other than taxpayer or fic | turn, including accompanying sche tuciary) is based on all informati | dules and statements, aron of which preparer ha | nd to the best of my kas any knowledge | Secretary Title | |
| | | 14 VI- | | A A Pate | Pacia | | parer's Identifying number |
| Paid Pre- | Preparer's signature | tan Seegmill | er | MAY . | J ZUIU | self. | e Signature in the instrs) 0052638 |
| R Pre- | | avage Esplin | | | | employed ► PU EIN ► 87-06 | |
| Use | Lyour if colf | O North Main | | | | | |
| Only | loddroce and | | 84770 | | | Phone no ► (4: | 35) 673-6195 |
| BAA | | | | | | | Form 990-PF (2009) |

| 009 | Federal Statements John L & Ardis J Piers Private | Page |
|---|--|--------------------------------------|
| | Foundation | 62-173359 |
| Statement 1 Form 990-PF, Part I, Line 16b Accounting Fees | | |
| | (a) (b) Net (c) Expenses Investment Adjusted per Books Income Net Income | (d) Charitable <u>Purposes</u> |
| CPA Fees | Total $\frac{$}{$}$ $\frac{480.}{$}$ $\frac{$}{$}$ $\frac{480.}{$}$ $\frac{$}{$}$ $\frac{$}{$}$ 0. | \$ 0. |
| Statement 2 Form 990-PF, Part I, Line 23 Other Expenses | | |
| | (a) (b) Net (c) Expenses Investment Adjusted <u>per Books Income Net Income</u> | (d) Charitable Purposes |
| Margin Interest | Total $\frac{\$}{\$}$ $\frac{241}{\$}$ $\frac{\$}{\$}$ $\frac{241}{\$}$ $\frac{\$}{\$}$ $\frac{241}{\$}$ | \$ 0 |
| Statement 3 Form 990-PF, Part III, Line 5 Other Decreases | | |
| Prior Year Income Taxes | Total | 35 |
| Statement 4 Form 990-PF, Part XV, Line 2a-d Application Submission Inform | ation | |
| Name of Grant Program: Name: Care Of: Street Address: | Name and Address in Part VII-A | |
| City, State, Zip Code: Telephone: Form and Content: Submission Deadlines: Restrictions on Awards: | Written requests stating purpose, limitations | , etc |