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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

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

For calendar year 2009, or tax year beginning , 2009, and ending , 20

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

Use the IRS label Otherwise, print or type See Specific Instructions	Name of foundation THE SCHOENBAUM FAMILY FDN, INC. 52-7932192		A Employer identification number 65-0043921
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number (see page 10 of the instructions) () -
	P.O. BOX 1908		C If exemption application is pending, check here <input type="checkbox"/> D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
	City or town, state, and ZIP code ORLANDO, FL 32802-1908		

H Check type of organization ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16) **\$ 18,038,745.** J Accounting method: ☐ Cash ☒ Accrual
☐ Other (specify) _____ (Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))				
	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)				
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B.				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	355,852.	434,615.		STMT 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	-22,809.			
b Gross sales price for all assets on line 6a	6,824.			
7 Capital gain net income (from Part IV, line 2)		5,089.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)	2,743,452.	20,372.		STMT 2
12 Total Add lines 1 through 11	3,076,495.	460,076.		
13 Compensation of officers, directors, trustees, etc.				
14 Other employee salaries and wages	14,600.			14,600.
15 Pension plans, employee benefits	1,117.			1,117.
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule)				
c Other professional fees (attach schedule)	26,853.	26,853.		
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions)		2,704.		
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule) STMT. 5	3,157.	14,196.		3,157.
24 Total operating and administrative expenses Add lines 13 through 23	45,727.	43,753.		18,874.
25 Contributions, gifts, grants paid	2,118,326.			2,118,326.
26 Total expenses and disbursements Add lines 24 and 25	2,164,053.	43,753.		2,137,200.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	912,442.			
b Net investment income (if negative, enter -0-)		416,323.		
c Adjusted net income (if negative, enter -0-)				

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing		60,765.	4,341,252.	4,341,252.
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶ Less allowance for doubtful accounts ▶				
	4	Pledges receivable ▶ Less allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)				
	7	Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10 a	Investments - U S and state government obligations (attach schedule)				
	b	Investments - corporate stock (attach schedule)				
	c	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) STMT 6	18,714,343.	15,645,032.	13,697,493.	
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation ▶ (attach schedule)				
15	Other assets (describe ▶ STMT 7)	100,000.				
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	18,875,108.	19,986,284.	18,038,745.		
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶)				
23	Total liabilities (add lines 17 through 22)					
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input checked="" type="checkbox"/>					
	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	18,875,108.	19,986,284.		
	30	Total net assets or fund balances (see page 17 of the instructions)	18,875,108.	19,986,284.		
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	18,875,108.	19,986,284.		

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	18,875,108.
2	Enter amount from Part I, line 27a	2	912,442.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	204,583.
4	Add lines 1, 2, and 3	4	19,992,133.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 9	5	5,849.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	19,986,284.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)			(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SEE PART IV DETAIL					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a					
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
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	5,089.	
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) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8.			3		

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

(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	3,212,261.	23,054,142.	0.13933552591
2007	1,990,319.	26,203,837.	0.07595525037
2006	1,261,898.	24,782,497.	0.05091892072
2005	1,314,250.	23,723,495.	0.05539866702
2004	1,208,685.	23,344,757.	0.05177543720
2 Total of line 1, column (d)			2 0.37338380122
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 0.07467676024
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 17,738,510.
5 Multiply line 4 by line 3			5 1,324,654.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 4,163.
7 Add lines 5 and 6			7 1,328,817.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.			8 2,137,200.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 18 of the instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of ruling letter if necessary - see instructions)		1	4,163.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3 Add lines 1 and 2		3	4,163.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	NONE
5 Tax based on investment income Subtract line 4 from line 3 If zero or less, enter -0-		5	4,163.
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	6,280.	
b Exempt foreign organizations-tax withheld at source	6b	NONE	
c Tax paid with application for extension of time to file (Form 8868)	6c	9,637.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d	7	15,917.	
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	11,754.	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax <input checked="" type="checkbox"/> 4,164. Refunded <input type="checkbox"/>	11	7,590.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input checked="" type="checkbox"/> \$ _____ (2) On foundation managers <input checked="" type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If "Yes," has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) <input checked="" type="checkbox"/> STMT 10		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address <u>N/A</u>				
14	The books are in care of <u>SUNTRUST BANK</u> Telephone no <u>(888) 942-3272</u>			
Located at <u>P.O. BOX 1908, ORLANDO, FL</u> ZIP + 4 <u>32802-1908</u>				
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15		

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		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? If "Yes," list the years	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see page 20 of the instructions)		X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)		N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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

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

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

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

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

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? ☐ Yes ☒ No

Organizations relying on a current notice regarding disaster assistance check here ☐ **5b** N/A

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No **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? ☐ Yes ☒ No **7b** N/A

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions)

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 11		- 0 -	- 0 -	- 0 -

2 Compensation of five highest-paid employees (other than those included on line 1 - see page 23 of the instructions) If none, enter "NONE."

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

Total number of other employees paid over \$50,000 ☐ **9** NONE

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services** (see page 23 of the instructions). If none, enter "NONE."

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

Total number of others receiving over \$50,000 for professional services **NONE****Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 NONE	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments. See page 24 of the instructions	
3 NONE	
Total. Add lines 1 through 3	

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	11,700,097.
b	Average of monthly cash balances	1b	6,308,543.
c	Fair market value of all other assets (see page 24 of the instructions)	1c	NONE
d	Total (add lines 1a, b, and c)	1d	18,008,640.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	18,008,640.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	270,130.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	17,738,510.
6	Minimum investment return. Enter 5% of line 5	6	886,926.

Part XI Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	886,926.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	4,163.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	4,163.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	882,763.
4	Recoveries of amounts treated as qualifying distributions	4	NONE
5	Add lines 3 and 4	5	882,763.
6	Deduction from distributable amount (see page 25 of the instructions)	6	NONE
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	882,763.

Part XII Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	2,137,200.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	2,137,200.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	4,163.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	2,133,037.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				882,763.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			NONE	
b Total for prior years 20____, 20____, 20____		NONE		
3 Excess distributions carryover, if any, to 2009				
a From 2004	78,965.			
b From 2005	197,074.			
c From 2006	135,766.			
d From 2007	795,432.			
e From 2008	2,072,046.			
f Total of lines 3a through e	3,279,283.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 2,137,200.				
a Applied to 2008, but not more than line 2a			NONE	
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)		NONE		
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)	NONE			
d Applied to 2009 distributable amount				882,763.
e Remaining amount distributed out of corpus	1,254,437.			
5 Excess distributions carryover applied to 2009 . (If an amount appears in column (d), the same amount must be shown in column (a).)	NONE			NONE
6 Enter the net total of each column as indicated below.				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	4,533,720.			
b Prior years' undistributed income Subtract line 4b from line 2b		NONE		
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		NONE		
d Subtract line 6c from line 6b. Taxable amount - see page 27 of the instructions		NONE		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions			NONE	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010.				NONE
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)	NONE			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	78,965.			
9 Excess distributions carryover to 2010 Subtract lines 7 and 8 from line 6a	4,454,755.			
10 Analysis of line 9				
a Excess from 2005	197,074.			
b Excess from 2006	135,766.			
c Excess from 2007	795,432.			
d Excess from 2008	2,072,046.			
e Excess from 2009	1,254,437.			

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling

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

4942(j)(3) or

4942(j)(5)

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

	Tax year	Prior 3 years			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see page 28 of the instructions.)**1 Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2))

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number of the person to whom applications should be addressed.

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

c Any submission deadlines.

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<i>a Paid during the year</i> SEE STATEMENT 13				
Total			3a	2,118,326.
<i>b Approved for future payment</i>				
Total			3b	

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

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

[illegible]

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

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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

Betty Schoenbaum
Signature of officer or trustee

Date 11/13/2010

PRESIDENT
Title

Sign Here

Paid	
Preparer's	
Use Only	

Preparer's
signature

Jeffrey E. Kuhlman

Date _____

11/12/2010

Check if self-employed ☐

Preparer's identifying
number (See **Signature** on
page 30 of the instructions)
P00353001

Firm's name (or yours if self-employed), address, and ZIP code

KPMG LLP

100 WESTMINSTER ST, 6TH FL, SUITE A
PROVIDENCE, RI 02903-

02903-9605

EIN ► 13-5565207

Phone no 888-942-3272

Form 990-PF (2009)

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS					6,824.	
		. VERITABLE SILVER POINT PARTNERS, L.P. PROPERTY TYPE: SECURITIES					49,271.00	12/31/2009
		. SALES FROM PNC BANK PROPERTY TYPE: SECURITIES					-29,632.00	12/31/2009
		. VERITABLE WCP PARTNERS, LP PROPERTY TYPE: SECURITIES					-25,205.00	12/31/2009
		. VERITABLE WCP PARTNERS, LP PROPERTY TYPE: SECURITIES					3,831.00	12/31/2009
TOTAL GAIN (LOSS)							----- 5,089. =====	

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

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
DIVIDENDS & INTEREST	355,852.	434,615.
	-----	-----
TOTAL	355,852.	434,615.
	=====	=====

FORM 990PF, PART I - OTHER INCOME
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
PARTNERSHIP INCOME	2,737,754.	19,744.
FEE REBATE	628.	628.
FEDERAL TAX REFUND	5,070.	
	-----	-----
TOTALS	2,743,452.	20,372.
	=====	=====

FORM 990PF, PART I - OTHER PROFESSIONAL FEES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
INVESTMENT MGMT FEES	26,853.	26,853.
	-----	-----
TOTALS	26,853.	26,853.
	=====	=====

FORM 990PF, PART I - TAXES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
FOREIGN TAX		2,704.
	-----	-----
TOTALS	=====	=====
		2,704.

FORM 990PF, PART I - OTHER EXPENSES

=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----	CHARITABLE PURPOSES -----
TELEPHONE BANK FEES			
AND MEMBERSHIPS	1,470.		1,470.
INSURANCE	1,604.		1,604.
OFFICE SUPPLIES	83.		83.
PARTNERSHIP DEDUCT		14,196.	
	-----	-----	-----
TOTALS	3,157.	14,196.	3,157.
	=====	=====	=====

THE SCHOENBAUM FAMILY FDN, INC. 52-7932192

65-0043921

FORM 990PF, PART II - OTHER INVESTMENTS

=====

DESCRIPTION	COST/ FMV C OR F
-------------	------------------------

ENDING BOOK VALUE	ENDING FMV
----------------------	---------------

SEE ATTACHED

C

15,645,032.

13,697,493.

TOTALS

15,645,032.

13,697,493.

=====

FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES
=====

DESCRIPTION -----	AMOUNT -----
BV ADJ OID INTEREST	4,583.
BV ADJ AMERICAN HEAVY LIFT SHIP	200,000.

TOTAL	204,583.
	=====

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES
=====

DESCRIPTION -----	AMOUNT -----
AMORTIZATION	1,690.
BV ADJ PAYROLL	260.
BV ADJ PRIOR YEAR UNCLEARED EFFECTS	866.
BV ADJ INCOME DISTRIBUTION	3,033.

TOTAL	5,849.
	=====

STATE(S) WHERE THE FOUNDATION IS REGISTERED
=====

FL

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

=====

OFFICER NAME:

BETTY SCHOENBAUM

ADDRESS:

C/O SUNTRUST BANK, P.O. BOX 1908
ORLANDO, FL 32802-1908

TITLE:

PRESIDENT' AS REQUIRED

OFFICER NAME:

JEFFRY SCHOENBAUM

ADDRESS:

C/O SUNTRUST BANK, P.O BOX 1908
ORLANDO, FL 32802-1908

TITLE:

VICE PRESIDENT' AS REQ'D

TITLE:

PRESIDENT' AS REQ'D

OFFICER NAME:

RAYMOND SCHOENBAUM

ADDRESS:

C/O SUNTRUST BANK, P.O. BOX 1908
ORLANDO, FL 32802-1908

TITLE:

VICE PRESIDENT' AS REQ'D

OFFICER NAME:

JOANN S. MILLER

ADDRESS:

C/O SUNTRUST BANK, P.O BOX 1908
ORLANDO, FL 32802-1908

TITLE:

VICE PRESIDENT' AS REQ'D

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

=====

OFFICER NAME:

EMILY SCHOENBAUM

ADDRESS:

C/O SUNTRUST BANK, P.O . BOX 1908

ORLANDO, FL 32802-1908

TITLE:

VICE PRESIDENT' AS REQ'D

THE SCHOENBAUM FAMILY FDN, INC. 52-7932192

65-0043921

FORM 990PF, PART XV, LINE 3 - CONTRIBUTIONS, GIFTS, GRANTS PAID

=====

RECIPIENT NAME:

SEE ATTACHED SCHEDULE

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

GENERAL CHARITABLE PURPOSE

FOUNDATION STATUS OF RECIPIENT:

N/A

AMOUNT OF GRANT PAID 2,118,326.

TOTAL GRANTS PAID:

2,118,326.

=====

STATEMENT 13

SCHEDULE D
(Form 1041)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

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

OMB No 1545-0092

2009

Name of estate or trust

THE SCHOENBAUM FAMILY FDN, INC. 52-7932192

Employer identification number

65-0043921

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

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

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a					

b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b **1b** 24,066.

2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 **2**

3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts **3**

4 Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2008 Capital Loss Carryover Worksheet **4** ()

5 Net short-term gain or (loss) Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back **5** 24,066.

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

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a LONG-TERM CAPITAL GAIN DIVIDENDS		STMT 1			6,824.

b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b **6b** -25,801.

7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 **7**

8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts **8**

9 Capital gain distributions **9**

10 Gain from Form 4797, Part I **10**

11 Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2008 Capital Loss Carryover Worksheet **11** ()

12 Net long-term gain or (loss) Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back **12** -18,977.

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

Schedule D (Form 1041) 2009

Part III Summary of Parts I and II		(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
Caution: Read the instructions before completing this part				
13	Net short-term gain or (loss)	13		24,066.
14	Net long-term gain or (loss):			
a	Total for year	14a		-18,977.
b	Unrecaptured section 1250 gain (see line 18 of the wrksh)	14b		
c	28% rate gain	14c		
15	Total net gain or (loss). Combine lines 13 and 14a	15		5,089.

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

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

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

Part V Tax Computation Using Maximum Capital Gains Rates	
Form 1041 filers. Complete this part only if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.	
Caution: Skip this part and complete the worksheet on page 8 of the instructions if: • Either line 14b, col (2) or line 14c, col (2) is more than zero, or • Both Form 1041, line 2b(1), and Form 990-T, line 4g are more than zero.	
Form 990-T trusts. Complete this part only if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col (2) or line 14c, col (2) is more than zero.	

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

Schedule D (Form 1041) 2009

Continuation Sheet for Schedule D
(Form 1041)

OMB No 1545-0092

2009

▶ See instructions for Schedule D (Form 1041).

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

Name of estate or trust

Employer identification number

THE SCHOENBAUM FAMILY FDN, INC. 52-7932192

65-0043921

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

1b Total Combine the amounts in column (f) Enter here and on Schedule D, line 1b	24,066.00
---	-----------

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

Schedule D-1 (Form 1041) 2009

FEDERAL CAPITAL GAIN DIVIDENDS

=====

LONG-TERM CAPITAL GAIN DIVIDENDS

15% RATE CAPITAL GAIN DIVIDENDS

PIMCO COMMODITY REALRTN STRATEGY-I

6,824.00

TOTAL 15% RATE CAPITAL GAIN DIVIDENDS

6,824.00

TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS

6,824.00

=====

2009 Grants made by The Schoenbaum Family Foundation, Inc.

\$ 7,500.00	All Sports Community Service, Tampa, FL	Grant #2009-1
21,665.75	Appalachian Center for the Economy & the Environment Lewisburg, WV	Grant #2009-2
10,000.00	Atlanta Community Food Bank, Atlanta, GA,	Grant #2009-3
2,500.00	Atlanta Scholars Kollel, Atlanta, GA	Grant #2009-4
15,000.00	Bread for the City, Washington, DC	Grant #2009-5
12,665.75	Capital Area Food Bank, Washington, DC	Grant #2009-6
6,000.00	Community Action Stops Abuse (CASA), St. Petersburg, FL	Grant #2009-7
150,983.00	Community Foundation of Sarasota Count, Sarasota, FL	Grant #2009-8
25,000.00	Glasser/Schoenbaum Human Services Center, Sarasota, FL	Annual Grant
6,000.00	Good Samaritan Health Clinic of Pasco, Inc., New Port Richey, FL	Grant #2009-9
300,000.00	Gulf Coast Community Foundation of Venice, Venice, FL	Grant #2009-31
20,000.00	Gulf Coast Jewish Family Services, Inc., Clearwater, FL	Grant #2009-10
10,000.00	Hillels of Georgia, Atlanta, GA	Grant #2009-11
20,000.00	House of Ruth, Washington, DC	Grant #2009-12
101,665.75	Jewish Federation of Greater Atlanta, Atlanta, GA	Grant #2009-13
7,500.00	Jewish Federation of Pinellas/Pasco Counties, Largo, FL	Grant #2009-14
50,000.00	Jewish Federation of Sarasota-Manatee, Sarasota, FL	Grant #2009-15
5,000.00	Jewish Museum of Florida, Miami Beach, FL	Grant #2009-16
13,500.00	Menorah Manor Senior Living LLC, St Petersburg, FL	Grant #2009-17
6,000.00	Metropolitan Ministries, Tampa, FL	Grant #2009-18
30,000.00	Mountain Institute, Elkins, WV	Grant #2009-19
16,000.00	Mountaineer Food Bank (Appalachia Program), Gassaway, WV	Grant #2009-20
15,000.00	My Sister's Place, Washington, DC	Grant #2009-21
2,500.00	National Conference on Soviet Jewry, Washington, DC	Grant #2009-22
77,165.75	Pinellas County Jewish Day School, Clearwater, FL	Grant #2009-23
31,000.00	So Others Might Eat (SOME), Washington, DC	Grant #2009-24
100,000.00	Tampa Jewish Federation,, Tampa, FL	Grant #2009-25
20,000.00	Washington DC Jewish Community Center, Washington, DC	Grant #2009-26
5,000.00	Weinstein Hospice, Atlanta, GA	Grant #2009-27
10,000.00	West Virginia Health Right, Inc., Charleston, WV	Grant #2009-28
5,000.00	William Breman Jewish Home, Atlanta, GA	Grant #2009-29
15,680.00	Women's Health Center of West Virginia, Charleston, WV	Grant #2009-30
1,000,000.00	World ORT, London, England	Part of #2008-1
<hr/>		
\$2,118,326.00	TOTAL GRANTS FOR 2009	



THE SCHOENBAUM FAMILY FDN
CUSTODY STATEMENT
Account number 12-35-044-3907207
January 1, 2009 - December 31, 2009

Detail

Realized gain/loss detail

Description	Quantity	Average tax cost per unit	Total tax cost (\$200,000.00)	Sale date	Sale price per unit	Total proceeds	Net realized gain/loss (\$10,000.00)
AMERICAN HEAVY LIFT SHIP GOVT GUAR	190,000			01/08/09		\$ 190,000 00	
05 382% DUE 06/01/2017							
E I DU PONT DE NEMOURS NTS	250,000	107 93200	- 269,830 00	10/15/09		250,000 00	- 19,830 00
06 875% DUE 10/15/2009							
FEDERAL NATL MTG ASSN NOTES CALL 04/01/2009 @100	200,000	99 90000	- 199,800 00	04/01/09	3 00	200,000 00	200 00
03 000% DUE 04/01/2011							
USA TREASURY BILLS DTD 08/07/2008 DUE 02/05/2009	1,000,000	99 49117	- 994,911 69	02/05/09		994,911 69	
USA TREASURY BILLS DTD 09/11/2008 DUE 03/12/2009	1,000,000	99 25021	- 992,502 09	03/12/09		992,502 09	
USA TREASURY BILLS DTD 09/18/2008 DUE 03/19/2009	500,000	99 53313	- 497,665 65	03/19/09		497,665 65	
USA TREASURY BILLS DTD 02/12/2009 DUE 08/13/2009	2,000,000	99 85338	- 1,997,067 50	06/22/09	99 98	1,997,067 50	
USA TREASURY BILL DTD 03/12/09 DUE 09/10/09	2,000,000	99 78381	- 1,995,676 12	09/10/09		1,995,676 12	
USA TREASURY BILLS DTD 07/03/2008 DUE 07/02/2009	500,000	98 90028	- 494,501 40	07/02/09		494,501 40	



THE SCHOENBAUM FAMILY FDN
 CUSTODY STATEMENT
 Account number 12-35-044-3907207
 January 1, 2009 - December 31, 2009

Detail

Realized gain/loss detail

Description	Quantity	Average tax cost per unit	Total tax cost	Sale date	Sale price per unit	Total proceeds	Net realized gain/loss
USA TREASURY BILLS DTD 10/23/2008 DUE 10/22/2009	2,000,000	99.69647	- 1,993,929.44	10/22/09		1,993,929.44	
USA TREASURY NOTES TREASURY INFLATION PROTECTN SECS 03 875% DUE 01/15/2009	500,000	129.99446	(654,572.29)	01/15/09		654,570.00	(2.29)
Total			(\$10,290,456.18)			\$10,260,823.89	(\$29,632.29)

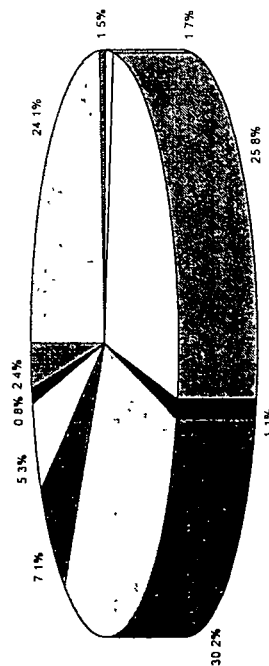
Performance Report
The Schoenbaum Family Foundation, Inc.
Account # 5861
Discretionary and Non-Discretionary Assets
December 31, 2009

Time Weighted Return

Benchmark Composition	Month To Date	Quarter To Date	Year To Date	Latest 1 Year	Inception To Date
Account	0 17	(11 98)	-	-	(11 98)

Performance Inception Date 09-30-09

Asset Allocation



- ☐ Cash & Cash Equivalents
- ☐ International Bonds
- ☐ High Yield Bonds
- ☐ Domestic Equities
- ☐ International Equities
- ☐ Miscellaneous
- ☐ Municipal Bonds
- ☐ Fixed Income-Taxable Bonds
- ☐ Domestic Equities
- ☐ Alternative Investments
- ☐ Real Estate

Summary

Security Type	Market Value	Pct Assets
Cash & Cash Equivalents	4,341,237 19	24 1
Municipal Bonds	264,897 00	1 5
International Bonds	315,575 38	1 7
Fixed Income-Taxable Bonds	4,658,875 46	25 8
High Yield Bonds	197,640 00	1 1
Domestic Equities	5,447,167 45	30 2
International Equities	1,286,475 93	7 1
Alternative Investments	949,921 04	5 3
Miscellaneous	137,256.50	0 8
Real Estate	439,684 00	2 4
TOTAL PORTFOLIO	18,038,729.96	100.0

The Schoenbaum Family Foundation, Inc.
Account # 5861
Discretionary and Non-Discretionary Assets
December 31, 2009

Monthly Activity		Year to Date Activity	
Portfolio Value on 11-30-09	19,072,981 53	Portfolio Value on 09-30-09	0 00
Accrued Interest	52,294 78	Accrued Interest	0 00
Total Value on 11-30-09	19,125,276 31	Total Value on 09-30-09	0 00
Net Contributions/Withdrawals	0 00	Net Contributions/Withdrawals	18,870,993 14
Realized Gains	0 00	Realized Gains	0 00
Change in Unrealized Gains	-41,379 68	Change in Unrealized Gains	191,632 92
Interest and Dividends	74,768 86	Interest and Dividends	43,744 65
Capital Gains Distributions	6,823 79	Capital Gains Distributions	6,823 79
Change in Accrued Interest	-8,433 32	Change in Accrued Interest	43,861 46
Wealth Management Fee	0 00	Wealth Management Fee	0 00
Other Receipts and Disbursements	-1,118,326 00	Other Receipts and Disbursements	-1,118,326 00
Portfolio Value on 12-31-09	17,994,868 50	Portfolio Value on 12-31-09	17,994,868 50
Accrued Interest	43,861 46	Accrued Interest	43,861 46
Total Value on 12-31-09	18,038,729 96	Total Value on 12-31-09	18,038,729 96

Portfolio Appraisal

The Schoenbaum Family Foundation, Inc.
Account # 5861
Discretionary and Non-Discretionary Assets
December 31, 2009

Security Name	Trade Date	Quantity or Face	Cost	Market Value	% Assets
Cash & Cash Equivalents					
ACCRUED STOCK DIVIDENDS			6,015.80	6,015.80	0.0
RIDGEWORTH FD-TAX EXEMPT MM			4,335,221.39	4,335,221.39	24.0
			4,341,237.19	4,341,237.19	24.1
Municipal Bonds					
ELIZABETH N J U S GOVT GTD NTS U S GOVT	01-01-03	50,000.0000	1.00	50,228.00	0.3
7.080% Due 08-01-11					
OREGON ST GO BDS	01-01-03	200,000.0000	204,341.11	210,694.00	1.2
5.000% Due 10-01-11					
Accrued Interest			3,975.00	3,975.00	0.0
			204,342.11	264,897.00	1.5
International Bonds					
AMERICAN CENTY INTL BD BENHAM EURO GV	01-01-03	21,869.3960	313,191.79	315,575.38	1.7
			313,191.79	315,575.38	1.7
Fixed Income-Taxable Bonds					
BERKSHIRE HATHAWAY FIN CORP	01-01-03	250,000.0000	239,835.50	258,820.00	1.4
4.200% Due 12-15-10					
FEDERAL FARM CR BKS CONS	01-01-03	250,000.0000	266,267.50	266,562.50	1.5
5.375% Due 07-18-11					
WELLS FARGO & CO FDIC GTD TLGP	09-29-09	350,000.0000	362,656.00	361,329.50	2.0
3.000% Due 12-09-11					
UNITED STATES TREAS NTS	01-01-03	608,710.0000	512,319.83	651,033.61	3.6
3.375% Due 01-15-12					
FEDERAL HOME LN MTG CORP	09-24-09	175,000.0000	174,125.00	174,191.50	1.0
1.000% Due 10-15-12					
FEDERAL HOME LN MTG CORP	01-01-03	200,000.0000	0.00	199,656.00	1.1
2.250% Due 10-22-12					
UNITED PARCEL SERVICE INC	01-01-03	200,000.0000	204,402.00	212,640.00	1.2
4.500% Due 01-15-13					
FEDERAL NATL MTG ASSN	01-01-03	200,000.0000	199,700.00	205,750.00	1.1
4.000% Due 01-18-13					
WAL MART STORES INC	01-01-03	150,000.0000	149,437.50	159,040.50	0.9
4.250% Due 04-15-13					
FEDERAL NATL MTG ASSN	01-01-03	150,000.0000	0.00	149,671.50	0.8
2.250% Due 04-22-13					

Investment Balances, Management Fees, and Performance Results are based on actual and estimated information as reported to GenSpring.

Portfolio Appraisal

The Schoenbaum Family Foundation, Inc.
Account # 5861
Discretionary and Non-Discretionary Assets
December 31, 2009

Security Name	Trade Date	Quantity or Face	Cost	Market Value	% Assets
FEDERAL FARM CR BKS CONS	01-01-03	250,000 0000	249,442 50	265,312 50	1 5
4 000% Due 05-21-13					
TARGET CORP	01-01-03	250,000 0000	229,385 00	260,525 00	1 4
4 000% Due 06-15-13					
UNITED STATES TREAS NTS	01-01-03	584,960 0000	612,193 89	618,595 20	3 4
2 000% Due 01-15-14					
UNITED STATES TREAS NTS	01-01-03	566,055 0000	579,330 30	588,697 20	3 3
1 625% Due 01-15-15					
AMERICAN HEAVY LIFT SHIPPING	01-01-03	215,000 0000	3,078,800 00	247,164 00	1 4
5 382% Due 06-01-17					
Accrued Interest			6,857,895 02	39,886 46	0 2
				4,658,875 46	25 8
High Yield Bonds					
ISHARES TR HIGH YLD CORP	01-01-03	2,250 0000	174,869 05	197,640 00	1 1
			174,869 05	197,640 00	1 1
Domestic Equities					
AT&T CORP COM	01-01-03	3,200 0000	121,952 00	89,696 00	0 5
BRISTOL MYERS SQUIBB COM	01-01-03	8,000 0000	427,600 00	202,000 00	1 1
CHEVRON CORP NEW COM	01-01-03	1,540 0000	68,183 50	118,564 60	0 7
CISCO SYS INC COM	01-01-03	7,300 0000	123,516 00	174,762 00	1 0
COLGATE PALMOLIVE CO COM	01-01-03	400 0000	23,008 00	32,860 00	0 2
EXXON MOBIL CORP COM	01-01-03	8,044 0000	317,335 80	548,520 36	3 0
FPL GROUP INC COM	01-01-03	2,000 0000	53,100 00	105,640 00	0 6
GATEWAY TR GATEWAY FD Y	01-01-03	26,043 5150	577,670 88	657,338 32	3 6
GENERAL ELEC CO COM	01-01-03	7,000 0000	254,870 00	105,910 00	0 6
INTEL CORP COM	01-01-03	4,300 0000	105,006 00	87,720 00	0 5
MICROSOFT CORP COM	01-01-03	12,800 0000	372,160 00	390,144 00	2 2
MIDCAP SPDR TRUST SERIES I	01-01-03	3,860 0000	397,501 64	508,516 40	2 8
PEPSICO INC COM	01-01-03	3,500 0000	170,685 00	212,800 00	1 2
PROCTER & GAMBLE CO COM	01-01-03	2,200 0000	80,527 37	133,386 00	0 7
SPDR TR UNIT SER I	01-01-03	3,900 0000	446,080 61	434,616 00	2 4
VANGUARD INDEX FDS SMALL CP ETF	01-01-03	3,500 0000	158,909 85	200,725 00	1 1
VANGUARD INTL EQTY IDX EMR MKT ETF	01-01-03	4,831 0000	167,205 84	198,071 00	1 1
VANGUARD TR STK MRK VIPERS INDX	01-01-03	13,250 0000	853,099 13	746,902 50	4 1
WISDOMTREE TRUST DEFA FD	01-01-03	6,325 0000	249,100 16	295,295 28	1 6

Portfolio Appraisal

The Schoenbaum Family Foundation, Inc.
Account # 5861
Discretionary and Non-Discretionary Assets
December 31, 2009

Security Name	Trade Date	Quantity or Face	Cost	Market Value	% Assets
WISDOMTREE TRUST SMALLCAP DIVID	01-01-03	5,250 0000	159,142 34 5,126,654 12	203,700 00 5,447,167 45	1.1 30.2
International Equities					
ARTISAN FDS INC INTL FD	01-01-03	7,576 7600	179,140 61	156,535 86	0.9
CAUSEWAY INTERNATIONAL VALUE FUND INST	01-01-03	12,175 9530	191,038 06	137,710 03	0.8
HARBOR INTERNATIONAL FUND	01-01-03	3,307 6320	157,863 77	181,489 77	1.0
ISHARES TR MSCI EAFE IDX	01-01-03	5,400 0000	250,965 35	298,512 00	1.7
ISHARES TR MSCI EMERG MKT	01-01-03	4,765 0000	158,670 51	197,747 50	1.1
T ROWE PRICE INTL BOND FUND	01-01-03	31,862 2870	330,355 41	314,480 77	1.7
			1,268,033 71	1,286,475 93	7.1
Alter native Investments					
BENNU II LTD PARTNERSHIP	03-28-03	1 0000	15,463 00	15,463 00	0.1
PIMCO FDS PAC INVT MGM COMM REALSTR I	01-01-03	71,410 1320	904,369 06	591,275 89	3.3
VERITABLE SILVER POINT LP	09-30-07	245,048 0000	343,181 23	343,181 15	1.9
VERITABLE WCP PARTNERS LP	02-28-08	112,079 0000	1 00	1 00	0.0
			1,263,014 29	949,921 04	5.3
Miscellaneous					
POWERSHARES DB CMDTY UNIT BEN INT	01-01-03	5,575 0000	123,885 86	137,256 50	0.8
			123,885 86	137,256 50	0.8
Real Estate					
ISHARES TR DJ US REAL EST	01-01-03	9,575 0000	313,146 31	439,684 00	2.4
			313,146 31	439,684 00	2.4
TOTAL PORTFOLIO			19,986,269 45	18,038,729 96	100.0
			14.44	14.44	
			19,986,269 45	18,038,729 96	
			14.44	14.44	
			19,986,269 45	18,038,729 96	

CHECKING

**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	Name of Exempt Organization	THE SCHOENBAUM FAMILY FDN, INC.	Employer identification number	65-0043921
	52-7932192			
	Number, street, and room or suite no. If a P.O. box, see instructions			
	P.O. BOX 1908			
File by the due date for filing your return. See instructions	City, town or post office, state, and ZIP code. For a foreign address, see instructions			
	ORLANDO, FL 32802-1908			

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

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

- The books are in the care of ► SUNTRUST BANK

Telephone No ► (888) 942-3272

FAX No ► _____

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

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 08/16, 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	\$ 15,917.
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	\$ 6,280.
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	\$ 9,637.

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

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

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