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

# 2009

Department of the Treasury  
Internal Revenue Service

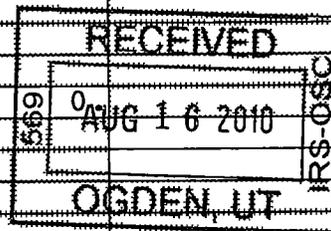
**Note.** The foundation may be able to use a copy of this return to satisfy state reporting requirements

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

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation <b>WHITE FOUNDATION, INC.</b>	A Employer identification number <b>65-0371997</b>
	Number and street (or P O box number if mail is not delivered to street address) Room/suite <b>PO BOX 2587</b>	B Telephone number
	City or town, state, and ZIP code <b>PONTE VEDRA, FL 32004</b>	C If exemption application is pending, check here <input type="checkbox"/>
	H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation	D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
	I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ <b>3,623,617.</b> (Part I, column (d) must be on cash basis.)	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))</small>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	3,271,666.		N/A	
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	71,248.	62.		STATEMENT 2
	4 Dividends and interest from securities	63,124.	22,869.		STATEMENT 3
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	107,630.			STATEMENT 1
	b Gross sales price for all assets on line 6a	1,145,768.			
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income	-1,384.	-1,384.		STATEMENT 4	
12 Total. Add lines 1 through 11	3,512,284.	21,547.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	56,228.	14,634.		41,594.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees STMT 5	10,042.	5,021.		5,021.
	b Accounting fees				
	c Other professional fees STMT 6	2,500.	2,500.		0.
	17 Interest				
	18 Taxes STMT 7	198.	198.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 8	3,147.	157,081.		1,821.
	24 Total operating and administrative expenses. Add lines 13 through 23	72,115.	179,434.		48,436.
	25 Contributions, gifts, grants paid	33,500.			33,500.
26 Total expenses and disbursements. Add lines 24 and 25	105,615.	179,434.		81,936.	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	3,406,669.				
b Net investment income (if negative, enter -0-)		0.			
c Adjusted net income (if negative, enter -0-)			N/A		



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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	856.	1,909,415.	1,909,415.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a investments - U S and state government obligations STMT 9	0.	850,167.	904,757.
	b Investments - corporate stock STMT 10	0.	561,346.	713,279.
	c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 11	0.	86,597.	96,166.	
14 Land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
<b>16 Total assets (to be completed by all filers)</b>	<b>856.</b>	<b>3,407,525.</b>	<b>3,623,617.</b>	
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			
	22 Other liabilities (describe ▶)			
<b>23 Total liabilities (add lines 17 through 22)</b>	<b>0.</b>	<b>0.</b>		
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 ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds	856.	3,407,525.		
<b>30 Total net assets or fund balances</b>	<b>856.</b>	<b>3,407,525.</b>		
<b>31 Total liabilities and net assets/fund balances</b>	<b>856.</b>	<b>3,407,525.</b>		

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	856.
2 Enter amount from Part I, line 27a	2	3,406,669.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	3,407,525.
5 Decreases not included in line 2 (itemize) ▶	5	0.
<b>6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30</b>	<b>6</b>	<b>3,407,525.</b>

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b	SEE ATTACHED STATEMENTS		
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	1,145,768.	1,214,269.	-68,501.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(j) FMV as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col (j) over col (k), if any	
a			
b			
c			
d			
e			-68,501.

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	-68,501.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8	3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	13,217.	7,629.	1.732468
2007	494.	14,920.	.033110
2006	1,004.	16,111.	.062318
2005	0.	16,937.	.000000
2004	100.	17,326.	.005772

2	Total of line 1, column (d)	2	1.833668
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	.366734
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	3,396,890.
5	Multiply line 4 by line 3	5	1,245,755.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	0.
7	Add lines 5 and 6	7	1,245,755.
8	Enter qualifying distributions from Part XII, line 4	8	81,936.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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

Table with 11 rows for excise tax calculations. Includes sub-sections 1a through 11, with a sub-table for credits/payments (6a-6d). Total tax due is 500.00, with 500.00 refunded.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Columns include question number, 'Yes', and 'No'. Most 'No' boxes are marked with an 'X'. Question 4a is marked 'N/A'.

**Part VII-A Statements Regarding Activities** (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)			X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?			X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	X		
14	The books are in care of ▶ J. ROBERT ROGERS Located at ▶ PO BOX 2587, PONTE VEDRA, FL Telephone no ▶ ZIP+4 ▶ 32004			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A			

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly)		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <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 <input type="checkbox"/> N/A	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions ) <input type="checkbox"/> N/A	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <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.) <input type="checkbox"/> N/A	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

**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 propoganda, or otherwise attempt to influence legislation (section 4945(e))?  Yes  No

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

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

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?  Yes  No

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

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?  Yes  No  
 Organizations relying on a current notice regarding disaster assistance check here  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). N/A

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  
 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

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
J. ROBERT ROGERS 113 LAMPLIGHTER LANE PONTE VEDRA, FL 32082	PRESIDENT 5.00	53,920.	0.	0.
DEBORAH MCKILLOP 510 WEIKVIA LANDING DR. APOPKA, FL 32712	SECRETARY 0.50	1,154.	0.	0.
BELINDA J. ROGERS 113 LAMPLIGHTER LANE PONTE VEDRA, FL 32082	TREASURER 0.50	1,154.	0.	0.

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

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

Total number of other employees paid over \$50,000 0

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

Total number of others receiving over \$50,000 for professional services ▶ 0

**Part IX-A** Summary of Direct Charitable Activities

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

**Part IX-B** Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3 <span style="float: right;">▶</span>	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	3,100,107.
b	Average of monthly cash balances	1b	348,512.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	3,448,619.
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	3,448,619.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	51,729.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,396,890.
6	Minimum investment return. Enter 5% of line 5	6	169,845.

**Part XI** Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here  and do not complete this part)

1	Minimum investment return from Part X, line 6	1	169,845.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	169,845.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	169,845.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	169,845.

**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	81,936.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	81,936.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	81,936.

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

**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				169,845.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				13,112.
f Total of lines 3a through e	13,112.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 81,936.				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				81,936.
e Remaining amount distributed out of corpus	0.			
f Total of lines 4a through 4e	13,112.			13,112.
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				74,797.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

**Part XIV Private Operating Foundations** (see instructions and Part VII-A, question 9) N/A

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

b Check box to indicate whether the foundation is a private operating foundation described in section  4942(j)(3) or  4942(j)(5)

	Tax year				(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
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 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 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

J ROBERT ROGERS

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

LETTER

c Any submission deadlines

NONE

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

LIMITED TO RELIGIOUS, CHARITABLE, SCIENTIFIC, EDUCATIONAL OR CULTURAL PURPOSES.







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

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

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

OMB No 1545-0047

**2009**

Name of the organization

WHITE FOUNDATION, INC.

Employer identification number

65-0371997

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

501(c)( ) (enter number) organization

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

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

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

501(c)(3) taxable private foundation

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

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

**General Rule**

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

**Special Rules**

For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ \_\_\_\_\_

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

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

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

Name of organization

Employer identification number

WHITE FOUNDATION, INC.

65-0371997

**Part I Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	ESTATE OF KATHERINE JEAN WHITE PO BOX 1728 PONTE VERDE BEACH, FL 32004	\$ 3,271,666.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

**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.)
a FLORIDA ST BOARD EDUCATION - 4.75% DTD 10/1/98, D	D		10/26/09
b FLORIDA ST BOARD EDUCATION - 4.5% DTD 1/1/99, DUE	D		10/14/09
c FLORIDA ST BOARD EDUCATION - 4.5% DTD 1/15/99, DU	D		10/26/09
d ORANGE CO. FL TOURIST DEV. - 6.5% DTD 3/15/92, DU	D		10/01/09
e CIL - MARRIOTT INTL INC	P		07/30/09
f CIL - MARRIOTT INTL INC	P		09/30/09
g CIL - NUVEEN INSD MUN OPPORTUNITY FD	P		10/15/09
h COLUMBIA TAX EXEMPT FUND A - 223.588 SHS	P	VARIOUS	12/04/09
i EVERGREEN MUNICIPAL BOND FUND - 104.862 SHS	P	VARIOUS	12/04/09
j FT-FRANKLIN FEDERAL T/F INC - 914.81 SHS	P	VARIOUS	12/04/09
k FT - FRANKLIN FL T/F INCOME - 320.76 SHS	P	VARIOUS	12/04/09
l MFS GOVERNMENT SECURITIES FUND - 42.216 SHS	P	VARIOUS	12/04/09
m MFS MUNICIPAL INCOME FUND - 172.218 SHS	P	VARIOUS	12/04/09
n PUTNAM TAX EXEMPT INCOME FUND	P	VARIOUS	12/04/09
o VAN KAMPEN HIGH YIELD MUNI FUND	P	VARIOUS	12/04/09

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 35,000.		35,019.	-19.
b 60,600.		58,008.	2,592.
c 25,250.		24,136.	1,114.
d 5,000.		5,040.	-40.
e 4.			4.
f 8.			8.
g 7.			7.
h 2,933.		2,824.	109.
i 762.		733.	29.
j 10,758.		10,260.	498.
k 3,666.		3,556.	110.
l 428.		424.	4.
m 1,424.		1,363.	61.
n 3,303.		3,151.	152.
o 853.		783.	70.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
(i) 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			-19.
b			2,592.
c			1,114.
d			-40.
e			4.
f			8.
g			7.
h			109.
i			29.
j			498.
k			110.
l			4.
m			61.
n			152.
o			70.

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
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8	3

**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 MORGAN STANLEY INSD MUNI SEC - 2,000 SHS	P	VARIOUS	12/04/09
b COLUMBIA TAX EXEMPT FUND A - 218.60 SHS	P	VARIOUS	12/04/09
c EVERGREEN MUNICIPAL BOND FUND - 111.862 SHS	P	VARIOUS	12/04/09
d FT - FRANKLIN FEDERAL T/F INC - 765.493 SHS	P	VARIOUS	12/04/09
e FT - FRANKLIN FL T/F INCOME - 331.083 SHS	P	VARIOUS	12/04/09
f MFS GOVERNMENT SECURITIES FUND - 40.556 SHS	P	VARIOUS	12/04/09
g MFS MUNICIPAL INCOME FUND - 145.918 SHS	P	VARIOUS	12/04/09
h PUTNAM TAX EXEMPT INCOME FUND - 8,660.959	P	VARIOUS	12/04/09
i VAN KAMPEN HIGH YIELD MUNI FUND - 89.769 SHS	P	VARIOUS	12/04/09
j EXXON MOBIL CORP - 200 SHS	D	VARIOUS	12/14/09
k CIL - MARRIOTT INTL INC	P	VARIOUS	12/03/09
l PEPSICO INC - 400 SHS	D	VARIOUS	12/18/09
m MFS INVT GRADE MUNICIPAL TRUST - 1,083 SHS	D	VARIOUS	12/04/09
n MORGAN STANLEY INSD MUNI INCOME - 4,000 SHS	D	VARIOUS	12/04/09
o NUVEEN MUNI ADVANTAGE FD INC. - 1,000 SHS	D	VARIOUS	12/04/09

(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 27,617.		27,830.	-213.
b 2,868.		2,818.	50.
c 813.		798.	15.
d 9,002.		8,850.	152.
e 3,784.		3,752.	32.
f 412.		392.	20.
g 1,207.		1,158.	49.
h 72,665.		74,191.	-1,526.
i 818.		877.	-59.
j 14,200.		15,720.	-1,520.
k 21.			21.
l 23,711.		26,392.	-2,681.
m 9,923.		11,420.	-1,497.
n 54,838.		55,340.	-502.
o 14,080.		15,030.	-950.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col. (h) gain over col (k), but not less than "-0-")
(i) 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			-213.
b			50.
c			15.
d			152.
e			32.
f			20.
g			49.
h			-1,526.
i			-59.
j			-1,520.
k			21.
l			-2,681.
m			-1,497.
n			-502.
o			-950.

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
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8	3

WHITE FOUNDATION, INC.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs MLC Co	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr)	(d) Date sold (mo., day, yr)
1a NUVEEN PERFORMANCE PLUS MUN FD INC	D	VARIOUS	12/04/09
b COLUMBIA TAX EXEMPT FUND A - 4,533 SHS	D	VARIOUS	12/04/09
c EATON VANCE NATIONAL MUNICIPAL INCOME FD - 13,854	D	VARIOUS	12/04/09
d EVERGREEN MUNICIPAL BOND FUND - 104.862 SHS	D	VARIOUS	12/04/09
e FT - FRANKLIN FEDERAL T/F INC - 16,526.377 SHS	D	VARIOUS	12/04/09
f FT - FRANKLIN FL T/F INCOME - 6,625.301 SHS	D	VARIOUS	12/04/09
g MFS GOVERNMENT SECURITIES FUND - 1,090.735 SHS	D	VARIOUS	12/04/09
h MFS MUNICIPAL INCOME FUND - 3,205.664 SHS	D	VARIOUS	12/04/09
i MSDW TAX-EXEMPT SECURITIES FUND	D	VARIOUS	12/04/09
j MSDW TAX-EXEMPT SECURITIES TRUST	D	VARIOUS	12/04/09
k VAN KAMPEN HIGH YIELD MUNI FUND - 1,328.853 SHS	D	VARIOUS	12/04/09
l NUVEEN INS MUNI OPPORT FD - 3,875 SHS	D	VARIOUS	12/04/09
m PUTNAM PREMIER INCOME TR - 2,944 SHS	D	VARIOUS	12/04/09
n VAN KAMPEN TR FOR INVT GRADE MUNIS - 2,457 SHS	D	VARIOUS	12/04/09
o CAPITAL GAINS DIVIDENDS			

(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 23,163.		23,974.	-811.
b 59,473.		60,334.	-861.
c 131,621.		159,885.	-28,264.
d 16,491.		16,695.	-204.
e 194,350.		196,003.	-1,653.
f 75,727.		77,052.	-1,325.
g 11,071.		10,057.	1,014.
h 26,511.		26,863.	-352.
i 57,207.		60,159.	-2,952.
j 44,396.		46,728.	-2,332.
k 12,106.		14,578.	-2,472.
l 54,838.		53,124.	1,714.
m 17,942.		16,288.	1,654.
n 33,783.		62,664.	-28,881.
o 1,134.			1,134.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Losses (from col. (h)) Gains (excess of col (h) gain over col. (k), but not less than "-0-")
a			-811.
b			-861.
c			-28,264.
d			-204.
e			-1,653.
f			-1,325.
g			1,014.
h			-352.
i			-2,952.
j			-2,332.
k			-2,472.
l			1,714.
m			1,654.
n			-28,881.
o			1,134.

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	-68,501.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8	3	N/A

FORM 990-PF GAIN OR (LOSS) FROM SALE OF ASSETS STATEMENT 1

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
FLORIDA ST BOARD EDUCATION - 4.75% DTD 10/1/98, DUE 06/01/23 - 35,000 UNITS	DONATED		10/26/09

(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
35,000.	35,019.	0.	0.	-19.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
FLORIDA ST BOARD EDUCATION - 4.5% DTD 1/1/99, DUE 06/01/23 - 60,000 UNITS	DONATED		10/14/09

(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
60,600.	58,988.	0.	0.	1,612.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
FLORIDA ST BOARD EDUCATION - 4.5% DTD 1/15/99, DUE 06/01/24 - 25,000 UNITS	DONATED		10/26/09

(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
25,250.	24,435.	0.	0.	815.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
ORANGE CO. FL TOURIST DEV. - 6.5% DTD 3/15/92, DUE 10/1/20	5,000.	5,216.	0.	0.	-216.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
CIL - MARRIOTT INTL INC	4.	0.	0.	0.	4.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
CIL - MARRIOTT INTL INC	8.	0.	0.	0.	8.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
CIL - NUVEEN INSD MUN OPPORTUNITY FD	7.	0.	0.	0.	7.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
COLUMBIA TAX EXEMPT FUND A - 223.588 SHS	2,933.	2,720.	0.	0.	213.

MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PURCHASED	VARIOUS	12/04/09

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
EVERGREEN MUNICIPAL BOND FUND - 104.862 SHS	762.	667.	0.	0.	95.

MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PURCHASED	VARIOUS	12/04/09

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
FT-FRANKLIN FEDERAL T/F INC - 914.81 SHS	10,758.	8,718.	0.	0.	2,040.

MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PURCHASED	VARIOUS	12/04/09

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
FT - FRANKLIN FL T/F INCOME - 320.76 SHS	3,666.	2,949.	0.	0.	717.

MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PURCHASED	VARIOUS	12/04/09

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MFS GOVERNMENT SECURITIES FUND - 42.216 SHS	428.	385.	0.	0.	43.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MFS MUNICIPAL INCOME FUND - 172.218 SHS	1,424.	1,257.	0.	0.	167.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
PUTNAM TAX EXEMPT INCOME FUND	3,303.	2,854.	0.	0.	449.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
VAN KAMPEN HIGH YIELD MUNI FUND	853.	717.	0.	0.	136.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MORGAN STANLEY INSD MUNI SEC - 2,000 SHS	27,617.	26,400.	0.	0.	1,217.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
COLUMBIA TAX EXEMPT FUND A - 218.60 SHS	2,868.	0.	0.	0.	2,868.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
EVERGREEN MUNICIPAL BOND FUND - 111.862 SHS	813.	0.	0.	0.	813.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
FT - FRANKLIN FEDERAL T/F INC - 765.493 SHS	9,002.	0.	0.	0.	9,002.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
FT - FRANKLIN FL T/F INCOME - 331.083 SHS	PURCHASED	VARIOUS	12/04/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.
3,784.	0.	0.	0.
(F) GAIN OR LOSS	3,784.		

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
MFS GOVERNMENT SECURITIES FUND - 40.556 SHS	PURCHASED	VARIOUS	12/04/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.
412.	0.	0.	0.
(F) GAIN OR LOSS	412.		

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
MFS MUNICIPAL INCOME FUND - 145.918 SHS	PURCHASED	VARIOUS	12/04/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.
1,207.	0.	0.	0.
(F) GAIN OR LOSS	1,207.		

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PUTNAM TAX EXEMPT INCOME FUND - 8,660.959	PURCHASED	VARIOUS	12/04/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.
72,665.	66,391.	0.	0.
(F) GAIN OR LOSS	6,274.		

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
VAN KAMPEN HIGH YIELD MUNI FUND - 89.769 SHS	818.	0.	0.	0.	818.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
EXXON MOBIL CORP - 200 SHS	14,200.	15,720.	0.	0.	-1,520.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
CIL - MARRIOTT INTL INC	21.	0.	0.	0.	21.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
PEPSICO INC - 400 SHS	23,711.	20,568.	0.	0.	3,143.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MFS INVT GRADE MUNICIPAL TRUST - 1,083 SHS	9,923.	7,635.	0.	0.	2,288.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MORGAN STANLEY INSD MUNI INCOME - 4,000 SHS	54,838.	47,600.	0.	0.	7,238.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
NUVEEN MUNI ADVANTAGE FD INC. - 1,000 SHS	14,080.	11,800.	0.	0.	2,280.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
NUVEEN PERFORMANCE PLUS MUN FD INC	23,163.	20,109.	0.	0.	3,054.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
COLUMBIA TAX EXEMPT FUND A - 4,533 SHS	DONATED	VARIOUS	12/04/09
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.
59,473.	58,971.	0.	0.
(F) GAIN OR LOSS	502.		

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
EATON VANCE NATIONAL MUNICIPAL INCOME FD - 13,854.859 SHS	DONATED	VARIOUS	12/04/09
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.
131,621.	115,965.	0.	0.
(F) GAIN OR LOSS	15,656.		

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
EVERGREEN MUNICIPAL BOND FUND - 104.862 SHS	DONATED	VARIOUS	12/04/09
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.
16,491.	16,207.	0.	0.
(F) GAIN OR LOSS	284.		

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
FT - FRANKLIN FEDERAL T/F INC - 16,526.377 SHS	DONATED	VARIOUS	12/04/09
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.
194,350.	187,979.	0.	0.
(F) GAIN OR LOSS	6,371.		

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
FT - FRANKLIN FL T/F INCOME - 6,625.301 SHS	75,727.	75,535.	0.	0.	192.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MFS GOVERNMENT SECURITIES FUND - 1,090.735 SHS	11,071.	11,307.	0.	0.	-236.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MFS MUNICIPAL INCOME FUND - 3,205.664 SHS	26,511.	25,448.	0.	0.	1,063.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MSDW TAX-EXEMPT SECURITIES FUND	57,207.	51,924.	0.	0.	5,283.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
MSDW TAX-EXEMPT SECURITIES TRUST	44,396.	40,331.	0.	0.	4,065.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
VAN KAMPEN HIGH YIELD MUNI FUND - 1,328.853 SHS	12,106.	11,081.	0.	0.	1,025.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
NUVEEN INS MUNI OPPORT FD - 3,875 SHS	54,838.	44,460.	0.	0.	10,378.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
PUTNAM PREMIER INCOME TR - 2,944 SHS	17,942.	12,541.	0.	0.	5,401.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
VAN KAMPEN TR FOR INVT GRADE MUNIS - 2,457 SHS	DONATED	VARIOUS	12/04/09
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.
33,783.	26,241.	0.	0.
			(F) GAIN OR LOSS
			7,542.
CAPITAL GAINS DIVIDENDS FROM PART IV			1,134.
TOTAL TO FORM 990-PF, PART I, LINE 6A			107,630.

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 2

SOURCE	AMOUNT
KINDER MORGAN ENERGY PARTNERS LP	38.
MORGAN STANLEY SMITH BARNEY - MUNI BONDS	65,784.
MORGAN STANLEY SMITH BARNEY - OID MUNI BONDS	202.
SUBURBAN PROPANE PARTNERS, L.P. "REPORTED UNDER EIN 25-6906725"	24.
UBS FINANCIAL SERVICES, INC. - MUNI BONDS	5,200.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	71,248.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 3

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
KINDER MORGAN ENERGY PTRS LP	3.	0.	3.
MORGAN STANLEY SMITH BARNEY	56,076.	1,134.	54,942.
UBS FINANCIAL SERVICES, INC.	8,179.	0.	8,179.
TOTAL TO FM 990-PF, PART I, LN 4	64,258.	1,134.	63,124.

FORM 990-PF OTHER INCOME STATEMENT 4

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
KINDER MORGAN ENERGY PARTNERS LP SUBURBAN PROPANE PARTNERS, L.P. "REPORTED UNDER EIN 25-6906725"	-1,615.	-1,615.	
	231.	231.	
TOTAL TO FORM 990-PF, PART I, LINE 11	-1,384.	-1,384.	

FORM 990-PF LEGAL FEES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL & ACCOUNTING	10,042.	5,021.		5,021.
TO FM 990-PF, PG 1, LN 16A	10,042.	5,021.		5,021.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OTHER PROF. FEES	2,500.	2,500.		0.
TO FORM 990-PF, PG 1, LN 16C	2,500.	2,500.		0.

FORM 990-PF TAXES STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISCELLANEOUS TAX	104.	104.		0.
MISCELLANEOUS TAX	94.	94.		0.
TO FORM 990-PF, PG 1, LN 18	198.	198.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 8

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADMINISTRATIVE EXPENSE	1,542.	0.		1,542.
ADMINISTRATIVE EXPENSE	279.	0.		279.
ACCOUNT MANAGEMENT FEE	1,231.	1,231.		0.
ACCOUNT TRANSFER FEE	95.	95.		0.
EXCESS DEDUCTION ON TERMINATION - E/O KATHERINE WHITE	0.	155,755.		0.
TO FORM 990-PF, PG 1, LN 23	3,147.	157,081.		1,821.

FORM 990-PF U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS STATEMENT 9

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
ORANGE CNTY FLA TOURIST - 5.125% 10/1/25 - 25,000 UNITS		X	27,755.	27,400.
LEE CNTY FLA PASSENGER - 5% 10/1/12 - 10,000 UNITS		X	10,003.	10,019.
PORT ORANGE FL - 3.85% 4/1/15 - 25,000 UNITS		X	26,288.	26,702.
PALM BEACH CO FLA CRMNL JSTC FAC - 7.2% 6/1/15 - 25,000 UNITS		X	31,079.	29,998.
JACKSONVILLE FLA SALES TAX - 3.625% 10/1/16 - 25,000 UNITS		X	25,100.	25,012.
LEE COUNTY FLA SCH BD - 4% 8/1/17 - 10,000 UNITS		X	10,090.	10,080.
TAMPA FLORIDA SOLID - 4.75% 10/1/17 - 25,000 UNITS		X	23,660.	25,057.
ORLANDO FLA CMNTY REDV - 5.125% 4/1/18 - 25,000 UNITS		X	25,598.	24,995.
DUVAL CO FL SCH BD - 4% 7/1/18 - 25,000 UNITS		X	24,931.	25,229.
LEE CNTY FLA CAP REV - 4.5% 10/1/18 - 25,000 UNITS		X	24,960.	25,659.
ESCAMBIA CO FLA SCH BRD - 4.125% 02/1/19 - 25,000 UNITS		X	22,444.	23,996.
ORANGE CNTY FLA TOURIST - 4.25% 10/1/19 - 25,000 UNITS		X	23,788.	25,277.

WHITE FOUNDATION, INC.

65-0371997

JACKSONVILLE FLA SALES TAX - 4%	X		
10/1/20 - 35,000 UNITS		34,698.	35,006.
GREATER ORLANDO FL - 5.125% 10/1/21	X		
- 25,000 UNITS		23,347.	25,212.
FLORIDA ST BRD ED CAP - 4.75%	X		
6/1/22 - 25,000 UNITS		25,380.	25,798.
LEE CNTY FLA SCH BD - 4.5% 8/1/22 -	X		
25,000 UNITS		23,835.	25,008.
LEE CNTY FL SCH BRD - 4.25% 8/1/22	X		
- 25,000 UNITS		23,225.	24,392.
CLEARWATER FLA STORMWATER SYS -	X		
4.25% 11/1/22 - 25,000 UNITS		23,493.	25,002.
PORT ST LUCIE FL - 4.625% 7/1/23 -	X		
25,000 UNITS		20,663.	23,665.
LEE CNTY FLA SCH BD - 4.5% 8/1/23 -	X		
25,000 UNITS		23,312.	24,841.
ST JOHNS CO FL - 5% 9/1/23 - 25,000	X		
UNITS		25,023.	24,852.
ORANGE COUNTY FLA PUB SVC - 4.5%	X		
10/1/24 - 25,000 UNITS		23,444.	25,256.
PALM BEACH CNTY FL - 4.375% 11/1/24	X		
- 25,000 UNITS		23,814.	25,235.
JACKSONVILLE FLA WTR & SWR - 6.35%	X		
8/1/25 - 25,000 UNITS		23,735.	25,097.
LEE CNTY FLA SCH BD - 4.5% 8/1/27 -	X		
25,000 UNITS		21,557.	24,115.
NORTHERN PALM BEACH CO FL - 4.5%	X		
8/1/27 - 50,000 UNITS		43,192.	49,341.
ORANGE CNTY FL AMBAC SCH BRD - 4.5%	X		
8/1/27 - 25,000 UNITS		21,265.	24,405.
TAMPA BAY WTR FLA - 4.75% 10/1/27 -	X		
5,000 UNITS		4,687.	5,014.
FLORIDA ST BRD ED - 4.5% 6/1/28 -	X		
50,000 UNITS		45,759.	50,008.
PALM BEACH CO FL HFA - 5.9% 6/1/29	X		
- 25,000 UNITS		24,193.	25,013.
DAYTONA BEACH FLA - 4.625% 7/1/29 -	X		
25,000 UNITS		22,222.	25,050.
ST PETERSBURG FL - 4.3% 10/1/29 -	X		
25,000 UNITS		21,009.	23,982.
JACKSONVILLE FL ELEC AU - 4.625%	X		
10/1/33 - 25,000		20,896.	23,958.
FLORIDA ST ED SYS HSG - 4.5% 5/1/34	X		
- 25,000 UNITS		20,716.	23,722.
MIAMI-DADE CNTY FLA - 4.75% 10/1/35	X		
- 20,000 UNITS		13,901.	17,895.
JACKSONVILLE ELE FL - 4.75% 10/1/43	X		
- 25,000 UNITS		21,105.	23,466.
TOTAL U.S. GOVERNMENT OBLIGATIONS			
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS		850,167.	904,757.
TOTAL TO FORM 990-PF, PART II, LINE 10A		850,167.	904,757.

FORM 990-PF CORPORATE STOCK STATEMENT 10

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
AT&T INC. - 1,200 SHS	32,196.	33,636.
CHEVRON CORP. - 799 SHS	56,961.	61,515.
COCA COLA CO. - 4,800 SHS	206,544.	273,600.
CONOCOPHILLIPS - 458 SHS	22,501.	23,390.
GENERAL ELECTRIC CO. - 1,200 SHS	14,904.	18,156.
INTERNATIONAL BUSINESS MACHINES - 400 SHS	36,640.	52,360.
JPMORGAN CHASE & CO. - 675 SHS	16,538.	28,127.
MARRIOTT INTL INC - 1,400 SHS	24,150.	38,532.
OCCIDENTAL PETROLEUM CORP - 200 SHS	11,364.	16,270.
PLUM CREEK TIMBER CO INC - 900 SHS	27,666.	33,984.
PROCTER & GAMBLE - 195 SHS	10,992.	11,823.
VERIZON COMMUNICATIONS INC - 400 SHS	12,396.	13,252.
WAL MART STORES INC - 800 SHS	38,880.	42,760.
KINDER MORGAN ENERGY PARTNERS - 690 SHS	31,049.	42,076.
SUBURBAN PROPANE PARTNERS - 500 SHS	18,565.	23,798.
TOTAL TO FORM 990-PF, PART II, LINE 10B	561,346.	713,279.

FORM 990-PF OTHER INVESTMENTS STATEMENT 11

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
EATON VANCE INSURED MUNICIPALS FUND CLASS B - 5,114.161 SHS	COST	45,662.	50,835.
MSDW PRIME INCOME TRUST - 1,350.002 SHS	COST	7,230.	9,639.
PIMCO TOTAL RETURN FUND CLASS B - 3,304.798 SHS	COST	33,705.	35,692.
TOTAL TO FORM 990-PF, PART II, LINE 13		86,597.	96,166.

FORM 990-PF

GRANTS AND CONTRIBUTIONS  
PAID DURING THE YEAR

STATEMENT 12

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
SOUTHERN WEST VIRGINIA COMMUNITY COLLEGE 2900 DEMPSEY BRANCH ROAD BUILDING C ROOM 428 MT. GAY, WV	UNIVERSITY SCHOLARSHIP FOR HOLLIE GOODWIN		1,500.
SOUTHERN WEST VIRGINIA COMMUNITY COLLEGE 2900 DEMPSEY BRANCH ROAD BUILDING C ROOM 428 MT. GAY, WV	UNIVERSITY SCHOLARSHIP FOR AMANDA SMITH		1,500.
SOUTHERN WEST VIRGINIA COMMUNITY COLLEGE 2900 DEMPSEY BRANCH ROAD BUILDING C ROOM 428 MT. GAY, WV	UNIVERSITY SCHOLARSHIP FOR AMBER SPURLOCK		2,000.
FAIRMONT STATE UNIVERSITY 1201 LOCUST AVENUE FAIRMONT, WV 26554	UNIVERSITY SCHOLARSHIP FOR EMILY SWANN		2,500.
MARSHALL UNIVERSITY #1 JOHN MARSHALL DRIVE, 101 OLD MAIN HUNTINGTON, WV 25755	UNIVERSITY SCHOLARSHIP FOR DALE HOLSTEIN		2,500.
WEST VIRGINIA UNIVERSITY MORGANTOWN, WV 26507	UNIVERSITY SCHOLARSHIP FOR ASHLEY HARLESS		2,500.
WEST VIRGINIA UNIVERSITY MORGANTOWN, WV 26507	UNIVERSITY SCHOLARSHIP FOR DREW RUNYAN		2,000.
WEST VIRGINIA UNIVERSITY MORGANTOWN, WV 26507	UNIVERSITY SCHOLARSHIP FOR JORDAN ROBERTS		5,000.

WHITE FOUNDATION, INC.

65-0371997

WEST VIRGINIA UNIVERSITY  
FOUNDATION  
PO BOX 1650 MORGANTOWN, WV  
26507

GENERAL PURPOSE

12,500.

MOUNTAINEER ATHLETIC CLUB  
PO BOX 0877 MORGANTOWN, WV  
26507

GENERAL PURPOSE

1,000.

ALZHEIMERS ASSOCIATION

GENERAL PURPOSE

500.

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

33,500.

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

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

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

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

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

<b>Type or print</b>	Name of Exempt Organization <b>WHITE FOUNDATION, INC.</b>	Employer identification number <b>65-0371997</b>
File by the due date for filing your return See instructions	Number, street, and room or suite no. If a P.O. box, see instructions. <b>PO BOX 2587</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>PONTE VEDRA, FL 32004</b>	

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

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

**J. ROBERT ROGERS**

- The books are in the care of ▶ **PO BOX 2587 - PONTE VEDRA, FL 32004**  
 Telephone No. ▶ \_\_\_\_\_ FAX No. ▶ \_\_\_\_\_
- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_. If this is for the whole group, check this box . If it is for part of the group, check this box  and attach a list with the names and EINs of all members the extension will cover.

**1** I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2010**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:  
 ▶  calendar year **2009** or  
 ▶  tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

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

<b>3a</b> 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.	<b>3a</b>	<b>\$</b>	<b>500.</b>
<b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	<b>\$</b>	<b>0.</b>
<b>c Balance Due.</b> 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.	<b>3c</b>	<b>\$</b>	<b>500.</b>

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

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

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