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# Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0052 2009

For calendar year 2009, or tax year beginning					nning	, 2009, and ending , 20											
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For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions. 9E1410 1 000 FTE285 B64M 4/23/2010 8:29:55 AM V 09-5.2

ATCH 2 JSA

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31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	일 _	-				
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	ᇛ	<b>5</b>				
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	<u>m</u> 2	Ь		<del></del>		
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	틹					
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	띳			726 720	712 277	
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	0 2	7		120,139.	113,211.	
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	ğ 2	8			<del></del>	
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	2	9		U.	U.	
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	₹ 3	0	` . •	706 700	B4 0 0BB	
of the instructions). 726,739. 713,277.  Part III Analysis of Changes in Net Assets or Fund Balances  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) 1 726,739  Enter amount from Part I, line 27a 2 −14,861  Other increases not included in line 2 (itemize) ▶ ATTACHMENT 5 3 1,744  Add lines 1, 2, and 3 4 713,622  Decreases not included in line 2 (itemize) ▶ ATTACHMENT 6 5 345	žΙ		instructions)	726,739.	/13,2//.	
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)  2 Enter amount from Part I, line 27a  3 Other increases not included in line 2 (itemize) ▶ ATTACHMENT 5  4 Add lines 1, 2, and 3  5 Decreases not included in line 2 (itemize) ▶ ATTACHMENT 6  5 345	3	1	Total liabilities and net assets/fund balances (see page 17			
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)  Enter amount from Part I, line 27a  Other increases not included in line 2 (itemize) ▶ ATTACHMENT 5  Add lines 1, 2, and 3  Decreases not included in line 2 (itemize) ▶ ATTACHMENT 6  ATTACHMENT 6  ATTACHMENT 6					713,277.	
end-of-year figure reported on prior year's return)  2 Enter amount from Part I, line 27a  3 Other increases not included in line 2 (itemize) ▶ ATTACHMENT 5  4 Add lines 1, 2, and 3  5 Decreases not included in line 2 (itemize) ▶ ATTACHMENT 6  5 345	Pa	rt II	Analysis of Changes in Net Assets or Fund E	Balances		
2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ ATTACHMENT 5 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ ATTACHMENT 6 5 345	1 T	otal	net assets or fund balances at beginning of year - Part II,	column (a), line 30 (must	agree with	
2 Enter amount from Part I, line 27a  3 Other increases not included in line 2 (itemize) ▶ ATTACHMENT 5  4 Add lines 1, 2, and 3  5 Decreases not included in line 2 (itemize) ▶ ATTACHMENT 6  5 345	е	nd-c	of-year figure reported on prior year's return)		1	726,739.
3 Other increases not included in line 2 (itemize) ► ATTACHMENT 5 3 1,744 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ► ATTACHMENT 6 5 345						-14,861.
Add lines 1, 2, and 3  Decreases not included in line 2 (itemize) ► ATTACHMENT 6  5 345	3 C	)the	r increases not included in line 2 (itemize) ATTACH	MENT 5	3	1,744.
5 Decreases not included in line 2 (itemize) ► ATTACHMENT 6 5 345	4 A	\dd	lines 1 2, and 3			713,622.
Total net assets or fund halances at end of year (line 4 minus line 5). Part II column (b) line 30	5 D	)есг	eases not included in line 2 (itemize)  ATTACH	MENT 6	• • • • • • • • • • •	345.
	6 T	otal	net assets or fund balances at end of year (line 4 minus li	ne 5) - Part II column (b)	- <i></i>	713,277.

d SEE PART IV SCHEDULE  c d e (e) Gross sales price  a b c d e Complete only for assets showin	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	D-Donation		
b c d e (e) Gross sales price  a b c d e		,			
c d e (e) Gross sales price a b c d e		,			
e (e) Gross sales price a b c d		,			
(e) Gross sales price  a b c d		,			
a b c d		,	ł		
b c d				(h) Gain or (lo (e) plus (f) mini	
c d e					
	i i				
·					
Complete only for assets showin		<u> </u>			
		I TO THE STATE OF		Gains (Col (h) g	
(i) F M V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	Col	(k), but not less t Losses (from co	
a					
b			<b> </b>		
С					
d					
e			ļ <del></del>		
Capital gain net income or (net o	CODITOLICEC)	gain, also enter in Part I, line 7 (loss), enter -0- in Part I, line 7	2		8,071.
Net short-term capital gain or (lo					
If gain, also enter in Part I, line 8	•	•			
If (loss), enter -0- in Part I, line 8.	, , , , ,		3		
Part V Qualification Under			ome		
		outable amount of any year in the b	ase perio	od?	ন, ভা
"Yes," the foundation does not qu		Do not complete this part		• • • • -	∫ Yes [X] N
(a)		ego page 18 of the instructions by	ofore mal		」Yes [△] N
		; see page 18 of the instructions be	efore mal	kıng any entries	」Yes [^] N
Base period years	(b)	; see page 18 of the instructions be (c) Net value of nonchantable-use assets	efore mal	kıng any entries (d) Distribution n	atio
Base penod years Calendar year (or tax year beginning in) A	(b) Adjusted qualifying distributions	(c) Net value of nonchantable-use assets	efore mal	kıng any entries	atio
Base penod years Calendar year (or tax year beginning in) A	(b) Adjusted qualifying distributions 50,500.	(c) Net value of nonchantable-use assets 866,280.	efore mal	kıng any entries (d) Distribution n	atuo cool (c)) 0.058295
Base penod years Calendar year (or tax year beginning in)  2008 2007	(b) Adjusted qualifying distributions 50,500. 49,990.	(c) Net value of noncharitable-use assets 866,280. 1,005,258.	efore mal	king any entries (d) Distribution in (col (b) divided by	atuo col (c)) 0.058295 0.049729
Base penod years Calendar year (or tax year beginning in)  2008  2007  2006	(b) Adjusted qualifying distributions 50,500. 49,990. 45,350.	(c) Net value of noncharitable-use assets  866,280.  1,005,258.  938,017.	efore mal	king any entries (d) Distribution in (col (b) divided by	o. 058295 0.049729
Base penod years Calendar year (or tax year beginning in)  2008 2007 2006 2005	(b) Adjusted qualifying distributions 50,500. 49,990. 45,350. 47,600.	(c) Net value of nonchantable-use assets  866,280.  1,005,258.  938,017.  926,508.	efore mal	king any entries (d) Distribution is (col (b) divided by	atio col (c)) 0.058295 0.049729 0.048347 0.051376
Base penod years Calendar year (or tax year beginning in)  2008 2007 2006	(b) Adjusted qualifying distributions 50,500. 49,990. 45,350.	(c) Net value of noncharitable-use assets  866,280.  1,005,258.  938,017.	efore mal	king any entries (d) Distribution is (col (b) divided by	otto col (c)) 0.058295 0.049729 0.048347
Base penod years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004	(b) Adjusted qualifying distributions 50,500. 49,990. 45,350. 47,600. 43,500.	(c) Net value of noncharitable-use assets  866,280.  1,005,258.  938,017.  926,508.  978,723.		king any entries (d) Distribution in (col (b) divided by	oto (c)) 0.058295 0.049729 0.048347 0.051376 0.044446
Base penod years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004  Total of line 1, column (d)	(b) Adjusted qualifying distributions 50,500. 49,990. 45,350. 47,600. 43,500.	(c) Net value of noncharitable-use assets  866,280.  1,005,258.  938,017.  926,508.  978,723.	efore mal	king any entries (d) Distribution in (col (b) divided by	atio col (c)) 0.058295 0.049729 0.048347 0.051376
Base penod years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004  Total of line 1, column (d) Average distribution ratio for th	(b) Adjusted qualifying distributions  50,500. 49,990. 45,350. 47,600. 43,500.	(c) Net value of nonchamtable-use assets  866,280.  1,005,258.  938,017.  926,508.  978,723.	2	king any entries (d) Distribution in (col (b) divided by	atto (c)) 0.058295 0.049729 0.048347 0.051376 0.044446
Base penod years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004  Total of line 1, column (d) Average distribution ratio for th	(b) Adjusted qualifying distributions  50,500. 49,990. 45,350. 47,600. 43,500.	(c) Net value of noncharitable-use assets  866,280.  1,005,258.  938,017.  926,508.  978,723.		king any entries (d) Distribution in (col (b) divided by	atto (c)) 0.058295 0.049729 0.048347 0.051376 0.044446
Base penod years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004  Total of line 1, column (d) Average distribution ratio for th number of years the foundation	(b) Adjusted qualifying distributions  50,500. 49,990. 45,350. 47,600. 43,500.  ne 5-year base period - dividen has been in existence if less	(c) Net value of nonchantable-use assets  866, 280.  1,005, 258.  938, 017.  926, 508.  978, 723.  e the total on line 2 by 5, or by the sthan 5 years	2 3	king any entries (d) Distribution in (col (b) divided by	0.058295 0.049729 0.048347 0.051376 0.044446 0.252193
Base penod years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004  Total of line 1, column (d) Average distribution ratio for th number of years the foundation	(b) Adjusted qualifying distributions  50,500. 49,990. 45,350. 47,600. 43,500.  ne 5-year base period - dividen has been in existence if less	(c) Net value of nonchamtable-use assets  866,280.  1,005,258.  938,017.  926,508.  978,723.	2	king any entries (d) Distribution in (col (b) divided by	o. 058295 0.049729 0.048347 0.051376 0.044446 0.252193 0.050439
Base penod years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004  Total of line 1, column (d) Average distribution ratio for th number of years the foundation  Enter the net value of noncharin	(b) Adjusted qualifying distributions  50,500. 49,990. 45,350. 47,600. 43,500.  ne 5-year base period - divide in has been in existence if less itable-use assets for 2009 fro	(c) Net value of noncharitable-use assets  866,280.  1,005,258.  938,017.  926,508.  978,723.  et the total on line 2 by 5, or by the sthan 5 years  om Part X, line 5	2 3 4	king any entries (d) Distribution in (col (b) divided by	0.058295 0.049729 0.048347 0.051376 0.044446 0.252193 0.050439
Base penod years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004  Total of line 1, column (d) Average distribution ratio for th number of years the foundation  Enter the net value of noncharin	(b) Adjusted qualifying distributions  50,500. 49,990. 45,350. 47,600. 43,500.  ne 5-year base period - dividen has been in existence if less itable-use assets for 2009 fro	(c) Net value of nonchantable-use assets  866, 280.  1,005, 258.  938, 017.  926, 508.  978, 723.  e the total on line 2 by 5, or by the sthan 5 years	2 3	king any entries (d) Distribution in (col (b) divided by	0.058295 0.049729 0.048347 0.051376 0.044446 0.252193 0.050439
Base penod years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004  Total of line 1, column (d) Average distribution ratio for the number of years the foundation Enter the net value of noncharit Multiply line 4 by line 3	(b) Adjusted qualifying distributions  50,500. 49,990. 45,350. 47,600. 43,500.  de 5-year base period - divide in has been in existence if less itable-use assets for 2009 fro	(c) Net value of noncharitable-use assets  866,280.  1,005,258.  938,017.  926,508.  978,723.  et the total on line 2 by 5, or by the sthan 5 years  om Part X, line 5	2 3 4 5	king any entries (d) Distribution in (col (b) divided by	atio (c)) 0.058295 0.049729 0.048347 0.051376 0.044446 0.252193 0.050439 665,125 33,548
Base penod years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004  Total of line 1, column (d) Average distribution ratio for the number of years the foundation Enter the net value of noncharit Multiply line 4 by line 3	(b) Adjusted qualifying distributions  50,500. 49,990. 45,350. 47,600. 43,500.  de 5-year base period - divide in has been in existence if less itable-use assets for 2009 fro	(c) Net value of noncharitable-use assets  866,280.  1,005,258.  938,017.  926,508.  978,723.  et the total on line 2 by 5, or by the sthan 5 years  om Part X, line 5	2 3 4	king any entries (d) Distribution in (col (b) divided by	atio (c)) 0.058295 0.049729 0.048347 0.051376 0.044446 0.252193 0.050439 665,125 33,548
Base penod years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004  Total of line 1, column (d) Average distribution ratio for th number of years the foundation Enter the net value of noncharit Multiply line 4 by line 3 Enter 1% of net investment income	(b) Adjusted qualifying distributions  50,500. 49,990. 45,350. 47,600. 43,500.  ne 5-year base period - divide in has been in existence if less itable-use assets for 2009 fro	(c) Net value of nonchantable-use assets  866, 280.  1,005, 258.  938, 017.  926, 508.  978, 723.  e the total on line 2 by 5, or by the sthan 5 years  om Part X, line 5	2 3 4 5 6	king any entries (d) Distribution in (col (b) divided by	atio (c)) 0.058295 0.049729 0.048347 0.051376 0.044446 0.252193 0.050439 665,125 33,548
Base penod years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004  Total of line 1, column (d) Average distribution ratio for th number of years the foundation Enter the net value of noncharif Multiply line 4 by line 3 Enter 1% of net investment income	(b) Adjusted qualifying distributions  50,500. 49,990. 45,350. 47,600. 43,500.  ne 5-year base period - divide in has been in existence if less itable-use assets for 2009 fro	(c) Net value of nonchantable-use assets  866, 280.  1,005, 258.  938, 017.  926, 508.  978, 723.  e the total on line 2 by 5, or by the sthan 5 years  om Part X, line 5	2 3 4 5	king any entries (d) Distribution in (col (b) divided by	atio (c)) 0.058295 0.049729 0.048347 0.051376 0.044446 0.252193
Base penod years Calendar year (or tax year beginning in)  2008 2007 2006 2005 2004  2 Total of line 1, column (d) Average distribution ratio for the number of years the foundation  Enter the net value of noncharit Multiply line 4 by line 3	(b) Adjusted qualifying distributions  50,500. 49,990. 45,350. 47,600. 43,500.  ne 5-year base period - divide in has been in existence if less itable-use assets for 2009 fro	(c) Net value of noncharitable-use assets  866,280.  1,005,258.  938,017.  926,508.  978,723.  et the total on line 2 by 5, or by the sthan 5 years  om Part X, line 5	2 3 4 5 6	king any entries (d) Distribution in (col (b) divided by	atio (c)) 0.058295 0.049729 0.048347 0.051376 0.044446 0.252193 0.050439 665,125 33,548

By state legislation that effectively amends the governing instrument so that no mandatory directions that

8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the

conflict with the state law remain in the governing instrument?

**b** If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General

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 ...

(or designate) of each state as required by General Instruction G? If "No," attach explanation

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

Form 990-PF (2009)

X

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Х

8ь

instructions) ►FL,

names and addresses

X

Х

Х

X

If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here

enterprise at any time during the year?

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

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?

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

3a Did the foundation hold more than a 2% direct or indirect interest in any business

X No

10316

Part VIII	and Contractors (continued)	gers, righly raid Employ	yees,
3 Five high	est-paid independent contractors for professional services (see page 23 o		
·	(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE			_
			C
~			
	<b></b>		
Total numb	er of others receiving over \$50,000 for professional services		▶ NONE
Part IX-A	Summary of Direct Charitable Activities		
	· · · · · · · · · · · · · · · · · · ·		<del></del>
	dation's four largest direct chantable activities dunng the tax year. Include relevant statistical inform ons and other beneficianes served, conferences convened, research papers produced, etc.	ation such as the number	Expenses
1 N/A			<u> </u>
2			
3			
4			
Part IX-B	Summary of Program-Related Investments (see page 23 of the instr	uctions)	<u> </u>
	two largest program-related investments made by the foundation during the tax year on lines 1 and		-Amount
1 NONE			
<u>.                                    </u>		····	
2			
All other oro	gram-related investments. See page 24 of the instructions	<del>_</del>	
3 NONE	gram reacted arreadilition. Good page 2.7 of the montheducite		
J			
			f

Pa	Part X Minimum Investment Return (All domestic foundation see page 24 of the instructions)	ns must complete this part. Foreig	gn foundations,	
1	1 Fair market value of assets not used (or held for use) directly in can	ying out charitable, etc.,		
	purposes:			
а	a Average monthly fair market value of secunties		1a	615,040.
b	b Average of monthly cash balances		1b	60,214.
С	c Fair market value of all other assets (see page 24 of the instructions)		1c	0.
	d Total (add lines 1a, b, and c)		1d	675,254.
е	e Reduction claimed for blockage or other factors reported on lines 1a	and		
	1c (attach detailed explanation)	1e		
2			2	0.
3			3	675,254.
4	4 Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for	r greater amount, see page 25		
	of the continuations.		4	10,129.
5		Enter here and on Part V, line 4	5	665,125.
6		• •	6	33,256.
	Part XI Distributable Amount (see page 25 of the instructions foundations and certain foreign organizations check here	(Section 4942(j)(3) and (j)(5) priva		
1	1 Minimum investment return from Part X, line 6		1	33,256.
2 a	2a Tax on investment income for 2009 from Part VI, line 5			
b		2b		
c	- Add lines On and Ob		2c	367.
3		1	3	32,889.
4			4	<del></del>
5			5	32,889.
6		s)	6	
7				
	line 1		7	32,889.
			•	
	Part XII Qualifying Distributions (see page 25 of the instruction			
1_				21 500
а	75 7	e 26	1a	31,500.
þ-			1b	0.
2	2 Amounts paid to acquire assets used (or held for use) directly in ca	arrying out charitable, etc ,		
	purposes		2	0.
3	- ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' '			
а			3a	0.
b	b Cash distribution test (attach the required schedule)		3b	0.
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V	, line 8, and Part XIII, line 4	4	31,500.
5	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 N	/A
6	6 Adjusted qualifying distributions. Subtract line 5 from line 4		6	31,500.
	Note: The amount on line 6 will be used in Part V, column (b), in significant qualifies for the section 4940(e) reduction of tax in those year		hether the foundation	on

Pa	irt XIII Undistributed Income (see page	e 26 of the instructio	ns)		
'n	Distributable amount for 2009 from Part XI,	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
	line 7				32,889
2	Undistributed income, if any, as of the end of 2009				
а	Enter amount for 2008 only				
b	Total for pnor years 20 07 ,20 06 ,20 05				
3	Excess distributions carryover, if any, to 2009				
а	From 2004				
b	2.056				
C	From 2006				
d	From 2008 1,099. From 2008 7,947.				
е	From 2008 7,947.				
	Total of lines 3a through e	11,102.			
4					
	line 4. ▶ \$ 31,500.				
а	Applied to 2008, but not more than line 2a				
b	Applied to undistributed income of prior years (Election required - see page 26 of the instructions)				
C	Treated as distributions out of corpus (Election required - see page 26 of the instructions)				
d	Applied to 2009 distributable amount				31,500.
е	Remaining amount distributed out of corpus	0.			
5	Excess distributions carryover applied to 2009	1,389.			1,389.
6	(If an amount appears in column (d), the same amount must be shown in column (a)) Enter the net total of each column as indicated below:		!		
а	Corpus Add lines 3f, 4c, and 4e Subtract line 5	9,713.			
	-Prior years' undistributed income Subtract				
	line 4b from line 2b				
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				
d	Subtract line 6c from line 6b Taxable				
е	amount - see page 27 of the instructions Undistributed income for 2008 Subtract line				
_	4a from line 2a Taxable amount - see page 27 of the instructions				
	Undistributed income for 2009 Subtract lines				
1	4d and 5 from line 1 This amount must be				
	distributed in 2010				
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				
8	instructions)				
9	Excess distributions carryover to 2010.				
-	Subtract lines 7 and 8 from line 6a	9,713.			
10	Analysis of line 9				
	Excess from 2005	1			
b	Excess from 2006 0 .				
c	Excess from 2007			İ	
d	Excess from 2008		1		
е	Excess from 2009				
	<del></del>	<u></u>			

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.

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

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

c Any submission deadlines

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

JSA 9E1490 1 000

Grants and Contributions Paid D	uring the Year or Appl	roved for Fi		
Recipient	if recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient	Contribution	
Paid during the year		1		
mm> a		1		
TTACHMENT 8				
		1		
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	}	1		
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Total	<del> </del>	<del>† • • • • †</del>		
Approved for fatare payment		1 1		
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ter gross a	amounts unless otherwise indicated	Unitera	ited business income	Excluded by	y section 512, 513, or 514	(e) Related or exemp
		(a) Business code	<b>(b)</b> Amount	(c) Exclusion code	(d) Amount	function income (See page 28 of the instructions
Program :	service revenue <sup>.</sup>	Business code		Exclusion code	Amount	the instructions
a		L		<del></del>		
b		<b> </b>				<del></del>
c		<u> </u>				
d	<del></del>	<u> </u>				<u></u>
e		<u> </u>			<del></del>	<del></del> _
f	<del></del>	<u> </u>				<del> </del>
	and contracts from government agencies	ļ				
	hip dues and assessments	ļ				
	savings and temporary cash investments	<del></del>		14	16,963.	
	s and interest from securities				10,303.	
	l income or (loss) from real estate.	<del></del>		<del>-  </del>		<u></u>
	financed property			<del></del>		<u> </u>
	ebt-financed property			<del></del>	<del></del>	<del></del>
	income or (loss) from personal property				<del></del>	<u> </u>
	estment income			18	8,071.	
	ss) from sales of assets other than inventory	$\Gamma \tau$				
	ne or (loss) from special events	1 1				
	ofit or (loss) from sales of inventory					
FEDI	enue aERAL TAX REFUND			01	34.	
				<del></del>		
ـــــ نا					<u> </u>	<del></del>
4					,	l .
Subtotal Total. Add worksho	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities	to venfy calcusto to the Ac	olations.)  complishment of E	xempt Purp	oses	25,0
e Subtotal Total. Add e-worksho Irt XVI-E ne No.	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the form	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
e Subtotal Total. Add e-worksho	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
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e Subtotal Total. Add e-worksho Irt XVI-E ne No.	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
Subtotal Total. Adde-workshourt XVI-E	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
Subtotal Total. Adde-workshourt XVI-E	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
Subtotal Total. Adde-workshourt XVI-E	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
Subtotal Total. Adde-workshourt XVI-E	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
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Subtotal Fotal. Add e-worksho rt XVI-F	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
Subtotal Total. Adde-workshourt XVI-E	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
Subtotal Fotal. Add e-worksho rt XVI-F	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
Subtotal Fotal. Add e-worksho rt XVI-F	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
Subtotal Fotal. Add e-worksho rt XVI-F	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
Subtotal Fotal. Add e-worksho rt XVI-F	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
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Subtotal Fotal. Add e-worksho rt XVI-F	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
Subtotal Total. Adde-workshourt XVI-E	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
Subtotal Total. Adde-workshourt XVI-E	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
Subtotal Total. Adde-workshourt XVI-E	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
Subtotal Fotal. Add e-worksho rt XVI-F	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
Subtotal Total. Adde-workshourt XVI-E	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
Subtotal Total. Adde-workshourt XVI-E	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25,0
Subtotal Total. Addee-worksho	Add columns (b), (d), and (e) d line 12, columns (b), (d), and (e) eet in line 13 instructions on page 28  Relationship of Activities  Explain below how each activities accomplishment of the for page 29 of the instructions.)	to venify calcusto to the Ac	ulations.)  complishment of E  ch income is report	Exempt Purp	ooses  (e) of Part XVI-A cor	25, 0

Pa	rt XVI	Information I Exempt Orga		ransfers To and	Transac	tions a	nd Relat	ionship	s With N	lonc	harit	able
1		he organization directly	or indirectly e								Yes	No
٠ ۽	organ	izations? fers from the reporting for	out (outer than	acharitable evernt orna	oration of.	0 00	, otion 527,	relating	to political			
		ash								1a(1)		х
		ther assets								1a(2)		Х
b		transactions.										
		ales of assets to a nonch								1b(1)		X
		urchases of assets from								1b(2)		X
		ental of facilities, equipm								1b(3)		X
		eimbursement arrangeme								1b(4)		X
		oans or loan guarantees erformance of services o								1b(5)		X
c		ng of facilities, equipmen								1c		X
d		answer to any of t									fair r	narket
		of the goods, other										
	value	in any transaction or	sharing arrang	ement, show in colu	mn (d) the	e value d	of the good	s, other	assets, or	service	es rec	eived
		T										
(a)	Line no	(b) Amount involved	(c) Name of no	oncharitable exempt organi	zation	(d) Descr	iption of transf	ers, transa	ctions, and shar	ing arra	ngeme	nts
						N/A						
_												
											•	
							<del> </del>		· · · · · · · · · · · · · · · · · · ·			
2 a		foundation directly or	•			ore tax-ex	empt organi	zations d	escribed in		_	ภ
		n 501(c) of the Code (oth		01(c)(3)) or in section 52	277				L	Ye	s	No 2
<u>b</u>	If "Ye	<ul> <li>s," complete the following (a) Name of organization</li> </ul>		(b) Type of orga	anization	<del></del>		(a) Dassan	tion of relations	hin		
		(a) Name of organization	•	(b) Type of orga	anizauon		<del></del>	(C) Descrip		шр		
		1										
		_/										
	Under beliet	penalties of perjury, I declar y strue, correct, and comp	are that I have example to Declaration of	mined this return, including preparer (other than taxp	g accompaniayer or fiduo	ying schedu lary) is bas	iles and stater ed on all infor	nents, and mation of	to the best of which preparer	fmy ka hasaa	nowled ny knov	ge and viedge
	, 9	Y INLAS ()	T2000			5-1-1		Vn.	A C		•	Ū
an a	1	anature of officer or trustee	<u>Can</u>			Date	<del></del> •	Title	<u> </u>			<del></del>
ler		gradure of officer of dustee	<del>/                                    </del>		Data /	/ /	<u>, , , , , , , , , , , , , , , , , , , </u>	True	Preparer's	ıdentıf	vina	
Sign Here	<u>.</u> ø _	Dunanta N		1/2/	Date	2/-	Check if self-employ	ed ▶	number (Se	e Signa	ture o	7
Sig	Paid Preparer's Use Only	Preparer's signature	/.	1470	17/2	3/10	3cm-employ	- L	P005414		acaons,	,
	Pal Prepa Use (	Firm's name (or yours if	MARCUM	RACHLIN, A DIV	OF MA	RCUM L	LP	EN ▶	11-19863	323		
	₹ ⊃	self-employed), address,	ONE SE	THIRD AVENUE,	10TH	FLOOR			-			
		and ZIP code	MIAMI,	FL		331	31	Phone n	o 305-3	77-4	228	

- ALLEN FAMILY FOUNDATION INC.
FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INV

C <i>A</i>	<u> PITAL GA</u>	<u>INS AND LC</u>	SSES FO	R TAX ON	<u>INVEST</u>	M	<u>ENT INCOM</u>	
Kind of F				ription		0.0	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)	
		200 SHS - C				Р	01/01/1990	09/01/2009
4,270.		PROPERTY TY 4,243.	PE: SECURIT	TIES			27.	
		100 SHS - D				₽	01/01/1990	09/01/2009
4,289.		1,994.	II. BECORT	. 125			2,295.	
		200 SHS - E				Р	02/08/2007	05/20/2009
6,785.		8,908.					-2,123.	
		50 SHS - GO PROPERTY TY				Р	06/28/2004	05/20/2009
6,948.		4,736.					2,212.	
		100 SHS - I PROPERTY TY			MACHS	Р	01/01/1990	09/01/2009
11,677.		9,284.					2,393.	
		100 SHS - J PROPERTY TY				Р	12/24/2003	05/20/2009
5,600.		5,052.					548.	
4 022		200 SHS - M				P	01/01/1990	_09./01/2009 
4,832.		5,470. 200 SHS - P	יייי איייייייייייייייייייייייייייייייי	AMDI E			-638. 01/01/1990	09/01/2009
10,748.		PROPERTY TY 8,940.					1,808.	09/01/2005
10,710.		100 SHS - T	ARGET CORP			P	01/01/1990	09/01/2009
4,677.		PROPERTY TY		ΓIES			1,549.	,
,							·	
TOTAL GAIN(L	OSS)						8,071.	

FORM 990PF, PART I - OTHER INCOME

REVENUE AND EXPENSES

PER BOOKS

34.

DESCRIPTION FEDERAL TAX REFUND

TOTALS

34.

PAGE 16

TAXES ı PART I FORM 990PF, REVENUE AND

EXPENSES PER BOOKS

INVESTMENT NET

INCOME

234. 173. 62.

234.

TOTALS

FOREIGN TAXES PAID FEDERAL EXCISE TAXES STATE INCORPORATION TAX

DESCRIPTION

469.

234.

- OTHER EXPENSES PART I FORM 990PF, REVENUE

6,460. AND EXPENSES PER BOOKS

INCOME 6,460. NET INVESTMENT

DESCRIPTION AGENCY FEES

6,460.

TOTALS

6,460.

ATTACHMENT 3 PAGE 17

10316

ATTACHMENT 4	ENDING FMV	686,857.	686,857.
ATTACH	ENDING BOOK VALUE	660,857.	. 1997
RPORATE STOCK	BEGINNING BOOK VALUE	677,112.	TOTALS 677,112.
FORM 990PF, PART II - CORPORATE STOCK	DESCRIPTION	EQUITY INVESTMENTS	

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

AMOUNT DESCRIPTION

1,744. PRIOR PERIOD ADJUSTMENT

> 1,744. TOTAL

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

DESCRIPTION

TRUOMA

UNREALIZED GAIN/LOSS ON INVESTMENTS

345.

TOTAL

345.

EXPENSE ACCT AND OTHER ALLOWANCES	ō	.0	.0	.0	0.
CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	ō	ō	0	.0	0
COMPENSATION	.0	.0	.0	.0	• 0
TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	PRESIDENT 2.00	DIRECTOR 2.00	TREASURER 2.00	SECRETARY 2.00	GRAND TOTALS
NAME AND ADDRESS	R.E. ALLEN 2400 SOUTH FEDERAL HIGHWAY SUITE 200 STUART, FL 34994	RICHARD S. ALLEN 2400 SOUTH FEDERAL HIGHWAY SUITE 200 STUART, FL 34994	REX ALLEN 2400 SOUTH FEDERAL HIGHWAY SUITE 200 STUART, FL 34994	KAREN ALLEN 2400 SOUTH FEDERAL HIGHWAY SUITE 200 STUART, FL 34994	

INC.
FOUNDATION
FAMI LY
ALLEN

65-0783002

FORM 990PE, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR

FOUNDATION STATUS OF RECIPIENT

RECIPIENT NAME AND ADDRESS

SEE SCHEDULE #1 ( 2/2 )

NO RELATIONSHIP PUBLUIC CHARITY

PURPOSE OF GRANT OR CONTRIBUTION

31,500.

AMOUNT

ATTACHMENT 8

CHARITABLE PURPOSES - SCHOLARSHIP

TOTAL CONTRIBUTIONS PAID

31,500.

PAGE 22 ATTACHMENT 8

10316

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### **SCHEDULE D** (Form 1041)

**Capital Gains and Losses** 

OMB No 1545-0092

Employer identification number

Department of the Treasury Internal Revenue Service Name of estate or trust

► 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).

LLEN FAMILY FOUNDATION INC.				03-07830	U Z		
Form 5227 filers need to complete only P	arts I and II.						
		Held One Ye	ar or Less		-		
(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (c) Date sold (mo , day, yr)		(d) Sales pnce	(e) Cost or other basis (see page 4 of the instructions)		(f) Gain or (loss) for the entire year Subtract (e) from (d)	
1.31.2.12				,		(-)	
		100 000 000			_	120 757 51 -115	
. 101 0						<del> </del>	
47-17-20-00-00-00-00-00-00-00-00-00-00-00-00-							
Enter the short-term gain or (loss), if any	from Schedule D	-1. line 1b	<u> </u>		1 b		
					3		
Carryover Worksheet	· • • • • • • • •				4	(	
• , ,	_	• • •			5		
Long-Term-Capital Gains and Loss	es - Assets Held	More Than Or	ne Year				
-(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	<del> </del>		(d) Sales price			(f) Gain or-(loss) for the entire year Subtract (e) from (d)	
				-			
b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b					6b	8,071	
Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824					7		
Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts					8		
Capital gain distributions					9		
					10		
Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2008 Capital Loss						 (	
Net long-term gain or (loss). Combine line	es 6a through 11	ın column (f).	Enter here and on li	ne 14a, j	-	8,071	
				<u> ▶  </u>	14	0,071	
	Enter the short-term gain or (loss), if any, short-term gain or (loss) from partner Short-term gain or (loss) from partner Short-term gain or (loss) from partner Short-term gain or (loss). Combine line column (3) on the back.  Long-term capital gain or (loss) from partner Short-term gain or (loss). Combine line column (3) on the back.  Long-term gain or (loss) from partner Short-term gain or (loss). Combine line column (3) on the back.  Enter the long-term gain or (loss) from partners (Example 100 shares 7% preferred of "Z" Co)  Enter the long-term gain or (loss) from partners Capital gain distributions.  Gain from Form 4797, Part I.  Long-term capital loss carryover Enter the Carryover Worksheet.  Net long-term gain or (loss). Combine line column (3) on the back.	Short-Term Capital Gains and Losses - Assets  (a) Description of property (Example 100 shares 7% preferred of "Z" Co)  (b) Date acquired (mo , day, yr)  Enter the short-term gain or (loss), if any, from Schedule D Short-term capital gain or (loss) from Forms 4684, 6252,  Net short-term gain or (loss) from partnerships, S corporat Short-term capital loss carryover Enter the amount, if any Carryover Worksheet  Net short-term gain or (loss). Combine lines 1a through 4 column (3) on the back  (Example 100 shares 7% preferred of "Z" Co)  (b) Date acquired (mo , day, yr)  (c) Combine lines 6a through 11  Long-term capital gain or (loss) from partnerships, S corporat Capital gain distributions  Gain from Form 4797, Part I  Long-term capital loss carryover Enter the amount, if any Carryover Worksheet  Net long-term gain or (loss). Combine lines 6a through 11  column (3) on the back	Short-Term Capital Gains and Losses - Assets Held One Ye  (Example 100 shares 7% preferred of 'Z' Co)  (b) Date acquired (c) Date sold (mo. day, yr)  (c) Date sold (mo. day, yr)  Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b  Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 882  Net short-term gain or (loss) from partnerships, S corporations, and other Short-term gain or (loss). Combine lines 1a through 4 in column (f) column (3) on the back  Long-Term-Capital Gains and Losses - Assets Held More Than Or (Example 100 shares 7% preferred of 'Z' Co)  Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b  Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and the long-term gain or (loss) from Forms 2439, 4684, 6252, 6781, and the long-term gain or (loss) from partnerships, S corporations, and other Capital gain distributions  Gain from Form 4797, Part I  Long-term capital loss carryover Enter the amount, if any, from line 14 coarryover Worksheet  Net long-term gain or (loss). Combine lines 6a through 11 in column (f) column (3) on the back	Form 5227 filers need to complete only Parts I and II.  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 (c) Date sold (mo . day, yr)  (d) Sales price  Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b  Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824  Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts  Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2008 Capital Los Carryover Worksheet  Net short-term gain or (loss). Combine lines 1a through 4 in column (f) Enter here and on line column (3) on the back  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 (c) Date sold (mo . day, yr)  (d) Sales price  (e) Description of property (Example 100 shares 7% preferred of 'Z' Co)  (e) Description of price sold (mo . day, yr)  (d) Sales price  (e) Description of price  (mo . day, yr)  (d) Sales price  (d) Sales price  (mo . day, yr)  (e) Description of price  (mo . day, yr)  (d) Sales price  (mo . day, yr)  (e) Description of price  (mo . day, yr)  (d) Sales price  (mo . day, yr)  (e) Description of price  (mo . day, yr)  (d) Sales price  (mo . day, yr)  (e) Description of price  (mo . day, yr)  (d) Sales price  (mo . day, yr)  (e) Description of price  (mo . day, yr)  (d) Sales price  (mo . day, yr)  (e) Description of price  (mo . day, yr)  (d) Sales price  (mo . day, yr)  (d) Sales price  (mo . day, yr)  (d) Sales price  (mo	Form 5227 filers need to complete only Parts I and I.  II Short-Term Capital Gains and Losses - Assets Held One Year or Less  (a) Description of property (Example 100 shares 7% preferred of *2** Co.)  (b) Date sequence (mo., day, yr.)  (c) Date sold (mo., day, yr.)  (d) Sales price (e) Sales price (e) Sales price (mo., day, yr.)  (e) Cost or other in the short-term gain or (loss), if any, from Schedule D-1, line 1b  Short-term capital gain or (loss) from partnerships, S corporations, and other estates or trusts  Short-term gain or (loss) from partnerships, S corporations, and other estates or trusts  Short-term gain or (loss). Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back.  III Long-Term Capital Gains and Losses - Assets Held More Than One Year  (Example 100 shares 7% pretend of *2** Co.)  (b) Date sequence (mo., day, yr.)  (c) Date sold (mo., day, yr.)  (d) Sales price (e) Cost or other (e	Short-Term Capital Gains and Losses - Assets Held One Year or Less   (e) Description of property (Example 100 shares 7% preferred of *2" Co)   (b) Date sequence (mo. day, yr)   (d) Sales price   (e) Cost or other based (mo. day, yr)   (d) Sales price   (e) Cost or other based (mo. day, yr)   (d) Sales price   (e) Cost or other based (mo. day, yr)   (d) Sales price   (e) Cost or other based (mo. day, yr)   (d) Sales price   (e) Cost or other based (mo. day, yr)   (d) Sales price   (e) Cost or other based (mo. day, yr)   (d) Sales price   (e) Cost or other based (mo. day, yr)   (d) Sales price   (e) Cost or other based (mo. day, yr)   (d) Sales price   (e) Cost or other based (mo. day, yr)   (d) Sales price   (e) Cost or other based (mo. day, yr)   (d) Sales price   (e) Cost or other based (mo. day, yr)   (d) Sales price   (e) Cost or other based (mo. day, yr)   (d) Sales price   (	

	dule D (Form 1041) 2009  rt III Summary of Parts I and II		(4) D 5	40) F-4-		Page 2
Га	Caution: Read the instructions before completing this pa	nrt.	(1) Beneficianes' (see page 5)	(2) Estator or trus		(3) Total
13		13				
1À	Net long-term gain or (loss):					
а		4a				8,071.
b		4b				
C	- · · · · · · · · · · · · · · · · · · ·	4c				
	* ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' ' '	15				8,071.
Note to Pa	e: If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form int V, and <b>do not</b> complete Part IV. If line 15, column (3), is a net loss, complete Part	990 t IV a	T, Part I, line 4a). If lines and the Capital Loss Carr	s 14a and 15, <b>yover Works</b> i	column neet, as	(2), are net gains, go necessary
Par	t IV Capital Loss Limitation					
16	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part	t I, li	ne 4c, if a trust), the <b>sm</b>	aller of:		
a Note	The loss on line 15, column (3) or b \$3,000 i: If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1	: :	- 00 / 5 000 T //-		16 (	)
Сапу	over Worksheet on page 7 of the instructions to figure your capital loss carryover.	i, iin	e 22 (or r-omi 990-1, iir	ie 34), is a io	ss, com	piete the Capital Loss
Pai	Tax Computation Using Maximum Capital Gains Rates					
there Cau E B Forr of F	in 1041 filers. Complete this part only if both lines 14a and 15 in column is is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more stion: Skip this part and complete the worksheet on page 8 of the instruction of the line 14b, col. (2) or line 14c, col. (2) is more than zero, or ooth Form 1041, line 2b(1), and Form 4952, line 4g are more than zero. In 990-T trusts. Complete this part only if both lines 14a and 15 are gorm 990-T, and Form 990-T, line 34, is more than zero. Skip this part for line 14b, col. (2) or line 14c, col. (2) is more than zero.	thar ons gain	n zero if. is, or qualified divide	nds are inc	luded i	n income in Part I
17		······································	147			
18	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34) Enter the smaller of line 14a or 15 in column (2)	•	17			
	but not less than zero					
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				1	
20	Add lines 18-and 19					
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			
	5 4 4 4 5 4 5 6 6 6 6 6 6 6 6 6 6 6 6 6			1		
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?  Yes. Skip lines 25 and 26, go to line 27 and check the "No" box.			1		
	No. Enter the amount from line 23		25			
26	Subtract line_25_from line 24					
27	Are the amounts on lines 22 and 26 the same?	• •				
	Yes. Skip lines 27 thru 30, go to line 31 No. Enter the smaller of line 17 or line 2	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 S	Sch	edule for Estates and			
	(see the Schedule Ginstructions in the instructions for Form 1041)			L	31	
				•	- 1	

32

33

32 Add lines 30 and 3133 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)

Tax on all taxable income. Enter the smaller of line 32 or line 33 here and on Form 1041, Schedule

Schedule D-1 (Form 1041) 2009 Page 2 Employer identification number Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side 65-0783002 ALLEN FAMILY FOUNDATION INC. Long-Term Capital Gains and Losses - Assets Held More Than One Year Part II (d) Sales price (see page 4 of the instructions) (e) Cost or other basis (see page 4 of the instructions) (b) Date (a) Description of property (Example 100 sh 7% preferred of "Z" Co) (c) Date sold (f) Gain or (loss) Subtract (e) from (d) acquired (mo, day, yr) (mo , day, yr ) 6a 200 SHS - CISCO SYS INC 01/01/1990 09/01/2009 4,270. 4,243. COME 27. 100 SHS - DEERE & CO COM 01/01/1990 09/01/2009 4,289. 1,994. 2,295. 200 SHS - EMERSON ELEC CO 6,785. 8,908. COM 02/08/2007 05/20/2009 -2,123.50 SHS - GOLDAN SACHS 6,948. GROUP 06/28/2004 05/20/2009 4,736. 2,212. 100 SHS - INTERNATIONAL 9,284. 2,393. BUSINESS MACHS 01/01/1990 09/01/2009 11,677. 100 SHS -JOHNSON & 05/20/2009 5,600. 5,052 **JOHNSON** 12/24/2003 548. 200 SHS - MICROSOFT CORP 01/01/1990 09/01/2009 4,832. 5,470. -638. 09/01/2009 8,940. 01/01/1990 10,748. 1,808. 200 SHS - PROCTER & GAMBLE 09/01/2009 100 SHS - TARGET CORP 01/01/1990 4,677. 3,128. 1,549.

8,071.

6b Total. Combine the amounts in column (f). Enter here and on Schedule D, line 6b . . . . . .

## 2008 Allen Family Foundation ID # 65-0783002

Allen Family Foundation ID # 65-0783002 Attachment to form 990-PF 990-PF Page 1, Part 1, Line 25

Recipients	Amount	Address	City	State	Zip
500 Yr Forest Foundation	500	1133 Old Abert Road	Lynchburg	VA	24503
Alzheimers Disease Researc	200	22512 Gateway Center Dr	Clarksburg	MD	20871
Amer. Inst Cancer Research	200	1759 R St, NW	Washington	DC	20009
American Cancer Society	200	865 SE Monterey Commons	Stuart	FL	34996
American Diabetas Assoc.	200	1701 N Beauregard St	Alexandra	VA	22311
American Heart Assoc.	200	P.O. Box 78851	Phoenix	ΑZ	85062
American Lung Association	200	P.O. Box 7000	Alberta Lea	MN	56007
American Red Cross	300	2750 S Kanner Hwy	Stuart	FL	34994
Arthritis Foundation	200	408 12th St. West	Brandenton	FL	34205
Blinded Vets Assoc.	200	477 H Street NW	Washington	DC	20001
Boys & Girls Club Of Martin	200	11500 SE Lares Ave	<b>Hobe Sound</b>	FL	33475
Boys Town	200	P.O. Box 14301	Boys Town	NE	68010
Bread Of Life Kitchen	300	2555 NE Savanna Rd	Jensen Beach	FI	34958
Bread Of Life Mission	300	P.O. Box 4276	Seattle	WA	98194
Cancer Ctr at John Hopkins	200	100 N Charles St., Suite 234	Baltimore	MD	21201
Care Gift-Center-	200	151 Ellis St NE	Atlanta	GA	30303
Childrens Home Society Fl	<sup>-</sup> 200	415 Avenue A, Suite 101	Ft. Pierce	FL	34950
Council On Aging	500	1071 East 10th St	Stuart	Fl	34996
Covenant House Of Florida	200	733 Breakers Ave	Ft. Lauderdale	FL	33304
Cystic Fibrosis Foundation	200	P.O. Box 96305	Washington	DC	20090
Disabled American Vets	200	P.O. Box 14301	Cincinnati	ОН	45250
Easter Seals	200	213 South Congress Ave	West Palm Beach	FL	33409
Florida Sherriffs Assoc	25	P.O. Box 12519	Tallahassee	FL	32317
Fla Sherriff Youth Ranch	200	P.O. Box 2000	Boys Ranch	FL	32064
Guide Eyes For The Blind	200	611 Granite Springs Rd	Yorktown Heights	NY	10598
Hardin-County Foundation	500	P.O. Box 343	Kenton <sup>-</sup>	ОН	43326
Hardin Cty Soup Kitchen	300	215 E. North St.	Kenton	ОН	43326
Harvest Food & Outreach	300	2520 Orange Ave	Ft. Pierce	FL	34947
Helping Hands Outreach	300	5499 West Third Street	Dayton	ОН	45427
Hibiscus Childrens Center	200	P.O. Box 305	Jensen Beach	FL	34958
His Servants Place	300	1296 CR 268 Cameron	Cameron	TX	76520
Treasure Coasr Hospice	200	1201 SE Indian St	Stuart	FL	34997
Humane Soc Of Treas. Coast	200	4100 SW Leighton Farm Ave	Palm City	FL	34990
Jejus House Of Hope	300	2484 SE Bonita St	Stuart	FL	34997
Ladle Of Love	300	10100 SE Federal Hwy	<b>Hobe Sound</b>	FL	33455
Little Sisters Of The Poor	200	964 Main St	Pawtucket	RI	2860
Logan County Preservation	5000	127 E Columbus Ave	Bellefontaine	ОН	43311

## 2008 Allen Family Foundation ID # 65-0783002

•	Loaves and Fishes	300	3127 Tuckaseegee Rd	Charlotte	NC	28208
	Macular Deg. Reasearch	200	22512 Gateway Center Dr	Clarksburg	MD	20871
	Make A Wish Foundation	200	3550 North Central Ave	Phoenix	ΑZ	85012
	Manna Kitchen	300	SE Kanner Hwy	Stuart	FŁ	34994
	March Of Dimes	200	P.O. Box 6708	Lake Worth	FL	33466
	Martin Memorial Hospital	500	P.O. Box 9010	Stuart	FL	34995
	Martin Memorial Fund	500	P.O. Box 9010	Stuart	FL	34995
	Marian M Club	500	2600 Cold Spring Rd.	Indianapolis	IN	46222
	Mary's Kitchen	300	623 East Ocean Blvd	Stuart	FL	34994
	Meals On Wheels	300-	3337 <sup>-</sup> SE Salerno Rd	Stuart	FL	34996
	Memorial Sloan Kettering	200	1275 York Ave	NY	NY	10065
	Mil. Order Of Purple Heart	200	P.O. Box 96188	Washington	DC	20077
	Mollys House	300	430 SE Osceola St	Stuart	FL	34994
	Moutpelier Foundation	300	P.O. Box 911	Orange	VA	22960
	Muscular Dystrophy Assoc.	200	3300 E. Sunrise Dr.	Tucson	ΑZ	85718
	Nat'l Childrens Cancer Soc	200	P.O. Box 8966	Topeka	KS	66608
	Nat'l Fund for Cancer Research	200	P.O. Box 96021	Washington	DC	20090
	Nat'l Law Enforc Officers	200	400 7th Street, NW Ste 300	Washington	DC	20004
	Nat'l M.S. Society	200	3201 W Commercial Blvd., #127	Ft. Lauderdale	FL	33309
	Neighborhood Center	300	115 E. Walnut St	Kenton	ОН	43326
	New Horizons of Treasure Coast	200	4500 W. Midway Rd	Ft. Pierce	FL	34981
	Operation Smile	500	6435 Tidewater Dr	Norfolk	VA	23509
	Our Daily Bread	300	208 W. Sandusky Ave	Bellefontaine	ОН	43311
	Paralyzed Vets Of America-	200	801 Eighteenth St, NW	Washington	_DC	20006
	Planned Parenthood	200	2300 N. Florida Mango_Rd	West Palm_Beach	FL	33409
	R.E & J.S.A. Foundation	6475	P.O_Box <sup>-</sup> 1379	Stuart	EL.	34995
	Salvation Army	500	901 Johnson Ave	Stuart	FL	34994
	Sidney Kimmel Comp Cancer	200	100 N Charles St., Suite 234	Baltimore	MD	21201
	Special Olympics	200	1105 Citrus Tower Blvd	Clermont	FL	34711
	St Judes Children Research	200	P.O. Box 50	Memphis	TN	38101
	St. Labre Indian School	200	St. Labre Indian School	Ashland	MT	59004
	The Carpenters Kitchen	300	1200 E. 10th Street	Stuart	FL	34996
	The Feeding Center	300	100 Martin Luther King Blvd	Stuart	FL	34996
	The Grace Place	300	1550 SE Salerno Rd	Stuart	FL	34997
	The Safe Space	200	632 SE-Monterey Rd	Palm City	FL	34990
	The Smile Train	500	41 Madison Ave, 28th FL	New York	NY	10010
	Treasure Coast Food Bank	500	3051 Industrial 25th St	Ft. Pierce	FL	34950
	Treasure Coast Cycling Assoc	200	P.O. Box 2559	Stuart	FL	34995
	United Way Martin Co.	200	800 Northpoint Pkwy	West Palm Beach	FL	33407
	Veterans of Foreign Wars	200	1023 Fifteenth St, NW	Washington	DC	20005
	<del>-</del>		· · · · · · · · · · · · · · · · · · ·	Stuart	FL	34996
	Visiting Nurse Assoc	200	Monterey Blvd	Stuart	Г <b>L</b>	ンマジフひ
	Total	\$31,500				