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

2009

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

For calendar year 2009, or tax year beginning , 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 JOHN P. KAVOORAS CHARITABLE FOUNDATION		A Employer identification number 65-6195165
	Number and street (or P O box number if mail is not delivered to street address) Room/suite C/O THOMAS A. SMITH, 96 N.E. FOURTH AVE		B Telephone number (561) 276-7468
	City or town, state, and ZIP code DELRAY BEACH, FL 33483		C If exemption application is pending, check here <input type="checkbox"/>
			D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
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			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 1,853,996. (Part I, column (d) must be on cash basis)			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	360,000.		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				
	4 Dividends and interest from securities	40,400.	40,400.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<44,651.>			
	b Gross sales price for all assets on line 6a	96,283.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11	355,749.	40,400.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees	STMT 2 3,220.	3,220.		0.
	c Other professional fees	STMT 3 8,235.	8,235.		0.
	17 Interest				
	18 Taxes	STMT 4 562.	0.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses				
	24 Total operating and administrative expenses. Add lines 13 through 23	12,017.	11,455.		0.
	25 Contributions, gifts, grants paid				
26 Total expenses and disbursements. Add lines 24 and 25	12,017.	11,455.		0.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	343,732.				
b Net investment income (if negative, enter -0-)		28,945.			
c Adjusted net income (if negative, enter -0-)			N/A		

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash - non-interest-bearing				
	2 Savings and temporary cash investments	246,597.	226,474.	226,474.	
	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	600.	600.	600.	
	10a Investments - U.S. and state government obligations				
	b Investments - corporate stock STMT 5	986,959.	1,350,771.	1,626,922.	
	c Investments - corporate bonds				
Liabilities	11 Investments - land, buildings, and equipment basis ▶				
	Less accumulated depreciation ▶				
	12 Investments - mortgage loans				
	13 Investments - other				
	14 Land, buildings, and equipment: basis ▶				
	Less accumulated depreciation ▶				
	15 Other assets (describe ▶)				
	16 Total assets (to be completed by all filers)	1,234,156.	1,577,845.	1,853,996.	
	17 Accounts payable and accrued expenses				
	18 Grants payable				
Net Assets or Fund Balances	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable				
	22 Other liabilities (describe ▶)				
23 Total liabilities (add lines 17 through 22)	0.	0.			
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	1,234,156.	1,577,845.	
30 Total net assets or fund balances	1,234,156.	1,577,845.			
31 Total liabilities and net assets/fund balances	1,234,156.	1,577,845.			

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	1,234,156.
2 Enter amount from Part I, line 27a	2	343,732.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,577,888.
5 Decreases not included in line 2 (itemize) ▶ BASIS ADJUSTMENT	5	43.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,577,845.

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 SCHEDULE ATTACHED		P		
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 96,283.		140,934.	<44,651.>
b			
c			
d			
e			

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

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			<44,651.>
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7
If (loss), enter -0- in Part I, line 7 } **2** <44,651.>

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	0.	1,365,738.	.000000
2007	0.	1,531,052.	.000000
2006	10,000.	1,325,944.	.007542
2005	113,500.	1,296,240.	.087561
2004	303,611.	1,382,755.	.219570

2 Total of line 1, column (d)	2	.314673
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	.062935
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,329,325.
5 Multiply line 4 by line 3	5	83,661.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	289.
7 Add lines 5 and 6	7	83,950.
8 Enter qualifying distributions from Part XII, line 4	8	0.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	579.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	579.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		5	579.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	600.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	600.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	21.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input type="checkbox"/> 21. Refunded <input type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> FL		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	X	

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ► N/A

14 The books are in care of ► THOMAS A. SMITH Telephone no. ► (561) 276-7468
 Located at ► 96 NORTHEAST FOURTH AVENUE, DELRAY BEACH, FL ZIP+4 ► 33483

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

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A
▶ ☐

5b

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
THOMAS A. SMITH 96 NORTHEAST FOURTH AVENUE DELRAY BEACH, FL 33483	TRUSTEE 1.00	0.	0.	0.
WILLIAM J. MANIKAS 639 EAST OCEAN AVENUE, SUITE #307 BOYNTON BEACH, FL 33435	TRUSTEE 1.00	0.	0.	0.
THORNTON M. HENRY 505 SOUTH FLAGLER DRIVE, SUITE #1100 WEST PALM BEACH, FL 33401	TRUSTEE 1.00	0.	0.	0.

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

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

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

0

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

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

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

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	1,214,455.
b	Average of monthly cash balances	1b	134,514.
c	Fair market value of all other assets	1c	600.
d	Total (add lines 1a, b, and c)	1d	1,349,569.
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	1,349,569.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	20,244.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,329,325.
6	Minimum investment return. Enter 5% of line 5	6	66,466.

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	66,466.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	579.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	579.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	65,887.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	65,887.
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	65,887.

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	0.
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	0.
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	0.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				65,887.
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	68,815.			
b From 2005	50,219.			
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	119,034.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$	0.			
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				0.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	65,887.			65,887.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	53,147.			
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				0.
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	2,928.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	50,219.			
10 Analysis of line 9:				
a Excess from 2005	50,219.			
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year NONE				
Total				▶ 3a 0.
b Approved for future payment NONE				
Total				▶ 3b 0.

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

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

OMB No 1545-0047

2009

Name of the organization

Employer identification number

JOHN P. KAVOORAS CHARITABLE FOUNDATION

65-6195165

Organization type (check one).

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions**General Rule**

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

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1 Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year ▶ \$ _____

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

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

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

Name of organization

Employer identification number

JOHN P. KAVOORAS CHARITABLE FOUNDATION

65-6195165

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	JOHN P. KAVOORAS CLUT FOR CHILDREN C/O WILLIAM MANIKAS, 639 E OCEAN AVE, #307 BOYNTON BEACH, FL 33435	\$ 300,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
2	JOHN P. KAVOORAS CLUT FOR GRANDCHILDREN C/O WILLIAM MANIKAS, 639 E OCEAN AVE, #307 BOYNTON BEACH, FL 33435	\$ 60,000.	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)

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
SMITH BARNEY AS NOMINEE	40,400.	0.	40,400.
TOTAL TO FM 990-PF, PART I, LN 4	40,400.	0.	40,400.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	3,220.	3,220.		0.
TO FORM 990-PF, PG 1, LN 16B	3,220.	3,220.		0.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT ADVISORY FEES	8,235.	8,235.		0.
TO FORM 990-PF, PG 1, LN 16C	8,235.	8,235.		0.

FORM 990-PF	TAXES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL INCOME TAXES	562.	0.		0.
TO FORM 990-PF, PG 1, LN 18	562.	0.		0.

FORM 990-PF	CORPORATE STOCK	STATEMENT	5
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCK	1,350,771.	1,626,922.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,350,771.	1,626,922.

FORM 990-PF	LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10	STATEMENT	6
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NAME OF CONTRIBUTOR	ADDRESS
JOHN P. KAVOORAS CLUT FOR CHILDREN	C/O WILLIAM J. MANIKAS, 639 E OCEAN AVE, #307 BOYNTON BEACH, FL 33435
JOHN P. KAVOORAS CLUT FOR GRANDCHILDREN	C/O WILLIAM J. MANIKAS, 639 E OCEAN AVE, #307 BOYNTON BEACH, FL 33435

Ref: 00005161 00038983

THOMAS A. SMITH TTEE

Account number 74D-01169-16 594

PORTFOLIO DETAILS

Your holdings are valued using the most current prices available to Citigroup Global Markets Inc. (CGMI). In most cases, these values are as of 12/31/09, but in some cases CGMI's sources are unable to provide timely information. To see the date of the most recent price update, please view your account online at www.smithbarney.com.

Securities purchased or sold are included or excluded in this section as of the trade-date. This section may include securities that have not settled as of this statement closing date. Please see the "Unsettled Purchases/Sales" section for more information. Dividend yield is the estimated annual income, assuming the current dividend, divided by the security's market price at the end of the statement period. We do not guarantee the accuracy of the prices reflected on the statement nor do these prices represent levels at which securities can be bought or sold. Please Note: unrealized gain/(loss) is being shown for informational purposes only and should not be used for tax preparation without the assistance of your tax advisor.

Money fund

An investment in a money market fund is neither insured nor guaranteed by the FDIC or any other government agency. Although money market funds seek to preserve the value of your investment at \$1.00 per share, there can be no assurance that will occur and it is possible to lose money should the fund value per share fall. Moreover, in some circumstances money market funds may be forced to cease operations when the value of a fund drops below \$1.00 per share. In that event, the fund's holdings would be liquidated and distributed to the fund's shareholders. This liquidation process could take up to one month or more. During that time, these funds would not be available to you to support purchases, withdrawals, and if applicable, check writing or ATM debits from your account.

Number of shares	Description	Current value	Accrued dividends	Annualized % dividend yield	Anticipated Income (annualized)
226,474.43	WESTERN ASSET GOVERNMENT MONEY MARKET FUND CLASS A	\$ 226,474.43		.01 %	\$ 22.84
Total money fund		\$ 226,474.43	\$ 0.00	.01 %	\$ 22.84

Common stocks & options

Quantity	Description	Symbol	Date acquired	Cost	Share cost	Current price	Current value	Unrealized gain/(loss)	Average % yield	Anticipated Income (annualized)
800	AFLAC INC	AFL	11/20/08	\$ 28,955.44	\$ 33.574	\$ 46.25	\$ 37,000.00	\$ 10,044.56	LT	\$ 898.00
1,500	AT&T INC	T	03/05/04	37,770.00	25.06	28.03	42,045.00	4,275.00	LT	2,570.00
600	AMGEN INC	AMGN	02/17/06	44,772.00	74.50	56.57	33,942.00	(10,830.00)	LT	
1,800	BB&T CORP	BBT	01/20/09	36,046.08	19.905	25.37	45,666.00	9,619.92	ST	
400			12/24/09	10,339.96	25.728	25.37	10,148.00	(191.96)	ST	
2,200				48,386.04	21.085		55,814.00	9,427.96		2,364
1,500	BRISTOL MYERS SQUIBB CO	BMJ	02/26/09	30,882.80	20.468	25.25	37,875.00	6,992.40	ST	1,820.00
1,200	CHEVRON CORP	CVX	10/15/03	44,728.02	37.213	76.99	92,388.00	47,659.98	LT	
300			02/17/06	17,161.50	57.085	76.99	23,097.00	5,935.50	LT	
1,500				61,889.52	41.26		115,485.00	53,595.48		3,532
										4,080.00



Ref: 00005161 00038984

THOMAS A. SMITH TTEE Account number 74D-01169-16 594

Common stocks & options continued

Quantity	Description	Symbol	Date acquired	Cost	Share cost	Current price	Current value	Unrealized gain/(loss)	Average % yield	Anticipated Income (annualized)
800	COCA-COLA CO	KO	05/11/09	\$ 34,575.76	\$ 43.099	\$ 57.00	\$ 45,800.00	\$ 11,024.24 ST	2.877%	\$ 1,312.00
1,000	CONOCOPHILLIPS	COP	01/16/04	32,424.10	32.364	51.07	51,070.00	18,645.90 LT	3.816	2,000.00
1,500	WALT DISNEY CO	DIS	06/17/08	48,888.85	33.191	32.25	48,375.00	(1,591.85) LT	1.085	525.00
1,000	EMERSON ELECTRIC CO	EMR	01/20/09	33,013.00	32.893	42.60	42,800.00	9,587.00 ST	3.145	1,340.00
2,000	GENERAL ELECTRIC CO	GE	01/08/96	24,658.64	12.25	15.13	30,260.00	5,601.36 LT		
2,000			03/17/09	19,780.00	9.77	15.13	30,260.00	10,480.00 ST		
4,000				44,438.64	11.11		60,520.00	16,081.36	2.643	1,800.00
1,000	HOME DEPOT INC	HD	12/29/08	23,279.20	23.159	28.93	28,930.00	5,650.80 LT		
500			01/20/09	11,244.60	22.369	28.93	14,465.00	3,220.40 ST		
600			12/24/09	17,519.94	28.079	28.93	17,358.00	(161.94) ST		
2,100				52,043.74	24.783		60,753.00	8,709.26	3.11	1,850.00
1,000	HONEYWELL INTL INC	HON	01/30/07	45,178.80	45.058	39.20	39,200.00	(5,978.80) LT		
500			12/24/09	19,974.95	39.829	39.20	19,600.00	(374.95) ST		
1,500				65,153.75	43.436		58,800.00	(6,353.75)	3.086	1,815.00
2,800	INTEL CORP	INTC	12/24/09	57,147.72	20.289	20.40	57,120.00	(27.72) ST	2.745	1,568.00
400	INTL BUSINESS MACHINES CORP	IBM	10/22/08	33,875.80	84.569	130.90	52,360.00	18,484.40 LT	1.88	860.00
1,000	JOHNSON & JOHNSON	JNJ	03/30/00	35,880.87	35.593	64.41	64,410.00	28,519.13 LT	3.043	1,960.00
1,000	KIMBERLY CLARK CORP	KMB	06/24/03	52,418.40	52.416	63.71	63,710.00	11,293.60 LT	3.767	2,400.00
1,200	KRAFT FOODS INC CLASS A	KFT	07/14/05	38,193.00	31.707	27.18	32,616.00	(5,577.00) LT		
800			12/24/09	22,070.40	27.468	27.18	21,744.00	(326.40) ST		
2,000				60,263.40	30.132		54,360.00	(5,903.40)	4.267	2,320.00
500	ELI LILLY & CO	LLY	05/08/09	18,139.85	36.159	35.71	17,855.00	(284.85) ST		
750			09/08/09	24,674.78	32.779	35.71	26,782.50	2,107.72 ST		
450			12/24/09	16,204.46	35.889	35.71	16,069.50	(134.96) ST		
1,700				58,019.09	34.717		60,707.00	1,687.91	5.488	3,332.00
600	MEDTRONIC INC	MDT	03/04/08	29,644.80	49.288	43.98	26,388.00	(3,256.80) LT		
600			03/17/09	16,930.80	28.098	43.98	26,388.00	9,457.20 ST		
200			12/24/09	8,821.96	43.989	43.98	8,796.00	(25.98) ST		
1,400				55,387.58	39.57		61,572.00	6,174.42	1.864	1,148.00
2,000	MICROSOFT CORP	MSFT	03/13/96	12,457.50	6.25	30.48	60,960.00	48,502.50 LT	1.708	1,040.00
1,000	PEPSICO INC	PEP	03/21/05	52,784.00	52.674	60.80	60,800.00	8,006.00 LT	2.96	1,800.00



Ref: 00005161 00038865

THOMAS A. SMITH TTEE Account number 74D-01169-16 594

Common stocks & options continued

Quantity	Description	Symbol	Date acquired	Cost	Share cost	Current price	Current value	Unrealized gain/(loss)	Average % yield	Anticipated Income (annualized)
900	PHILIP MORRIS INTL INC	PM	11/13/08	\$ 34,998.03	\$ 38.766	\$ 48.19	\$ 43,371.00	\$ 8,372.97 LT		
400			12/24/09	19,563.96	48.789	48.19	19,276.00	(287.96) ST		
1,300				54,561.99	41.971		62,647.00	8,085.01	4.814	3,016.00
700	PROCTER & GAMBLE CO	PG	10/10/08	40,508.16	57.748	60.63	42,441.00	1,932.84 LT	2.902	1,232.00
700	STRYKER CORP	SYK	01/20/09	28,187.32	40.147	50.37	35,259.00	7,071.68 ST		
400			12/24/09	20,483.92	51.089	50.37	20,148.00	(335.92) ST		
1,100				48,671.24	44.247		55,407.00	6,735.76	1.191	980.00
1,901	TECO ENERGY INC	TE	08/26/04	47,151.14	25.00	16.22	30,834.22	(16,316.92) LT		
1,089			11/15/04	16,546.47	15.13	16.22	17,825.78	1,279.31 LT		
3,000				63,697.61	21.233		48,660.00	(15,037.61)	4.832	2,400.00
500	TELEFLEX INC	TFX	06/11/97	15,997.73	31.75	53.89	26,945.00	10,947.27 LT		
500			12/02/99	17,161.37	33.875	53.89	26,945.00	9,783.63 LT		
1,000				33,159.10	33.159		53,890.00	20,730.90	2.523	1,360.00
1,000	THERMO FISHER SCIENTIFIC INC	TMO	01/11/06	31,675.00	31.555	47.69	47,690.00	16,015.00 LT		
1,400	US BANCORP DEL NEW	USB	10/10/08	38,777.36	28.292	22.51	31,514.00	(8,263.36) LT	888	280.00
850	WAL-MART STORES INC	WMT	11/17/09	45,731.36	53.681	53.45	45,432.50	(298.86) ST		
250			12/24/09	13,454.98	53.699	53.45	13,382.50	(82.48) ST		
1,100				59,186.34	53.806		58,795.00	(391.34)	2.039	1,199.00
Total common stocks and options				\$ 1,350,770.50			\$ 1,828,022.00	\$ 477,251.50 ST	2.53	
Total portfolio value				\$ 1,577,244.93			\$ 1,853,396.43	\$ 276,151.50 ST	2.58	\$ 47,335.64



JOHN P. KAVOORAS CHARITABLE FOUNDATION
I D. # 65-6195165
FORM 990-PF
2009

PAGE 3, PART IV

GAIN AND LOSS SCHEDULE

SHARES	DESCRIPTION	DATE ACQUIRED	DATE SOLD	GROSS PROCEEDS	COST BASIS	TOTAL GAIN/LOSS
1,200	E I DU PONT DE NEMOURS & CO	4/6/2001	3/16/2009	24,838.66	50,942.82	(26,104.16)
1,000	PFIZER NC	3/6/2006	5/8/2009	14,275.13	26,120.00	(11,844.87)
600	DEERE & CO	1/28/2005	9/8/2009	25,601.46	20,211.00	5,390.46
2,000	BANK OF AMERICA CORP	12/18/2000	11/17/2009	31,068.19	43,660.37	(12,592.18)
	SECURITY LITIGATION SETTLEMENTS			499.81	0.00	499.81
				<u>96,283.25</u>	<u>140,934.19</u>	<u>(44,650.94)</u>