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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 ALLIANZ FOUNDATION FOR NORTH AMERICA	A Employer identification number 68-0493856
	Number and street (or P O box number if mail is not delivered to street address) 777 SAN MARIN DRIVE	B Telephone number (see page 10 of the instructions) (301)408-8195
	City or town, state, and ZIP code NOVATO CA 94998	C If exemption application is pending, check here ► <input type="checkbox"/> D 1. Foreign organizations, check here ► <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ► <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here ► <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ► <input type="checkbox"/>
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		
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ► \$ 53,690	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	(Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	513,639			
1 Contributions, gifts, grants, etc., received (attach schedule)				
2 Check ► <input type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	0	0		
4 Dividends and interest from securities	0	0		
5 a Gross rents				
b Net rental income or (loss) 0				
6 a Net gain or (loss) from sale of assets not on line 10				
b Gross sales price for all assets on line 6a 0				
7 Capital gain net income (from Part IV, line 2)		0		
8 Net short-term capital gain			0	
9 Income modifications				
10 a Gross sales less returns and allowances 0				
b Less Cost of goods sold 0				
c Gross profit or (loss) (attach schedule) 0				
11 Other income (attach schedule)	0	0	0	
12 Total. Add lines 1 through 11	513,639	0	0	
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc.	0			
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16 a Legal fees (attach schedule) 0	0	0	0	0
b Accounting fees (attach schedule) 0	0	0	0	0
c Other professional fees (attach schedule) 0	0	0	0	0
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions) 0	0	0	0	0
19 Depreciation (attach schedule) and depletion	0	0	0	
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)	0	0	0	0
24 Total operating and administrative expenses				
Add lines 13 through 23	0	0	0	0
25 Contributions, gifts, grants paid 474,500	474,500			474,500
26 Total expenses and disbursements. Add lines 24 and 25 474,500	474,500	0	0	474,500
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements 39,139	39,139			
b Net investment income (if negative, enter -0-) 0	0			
c Adjusted net income (if negative, enter -0-) 0	0			0

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year		
			(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1	Cash—non-interest-bearing	14,551	53,690	53,690	
	2	Savings and temporary cash investments				
	3	Accounts receivable ►	0			
		Less allowance for doubtful accounts ►	0	0	0	
	4	Pledges receivable ►	0			
		Less allowance for doubtful accounts ►	0	0	0	
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)				
	7	Other notes and loans receivable (attach schedule) ►	0			
		Less allowance for doubtful accounts ►	0	0	0	
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10	a Investments—U S and state government obligations (attach schedule)		0	0	0
		b Investments—corporate stock (attach schedule)		0	0	0
		c Investments—corporate bonds (attach schedule)		0	0	0
	11	Investments—land, buildings, and equipment basis ►	0			
	Less accumulated depreciation (attach schedule) ►	0	0	0	0	
12	Investments—mortgage loans					
13	Investments—other (attach schedule)		0	0	0	
14	Land, buildings, and equipment basis ►	0				
	Less accumulated depreciation (attach schedule) ►	0	0	0	0	
15	Other assets (describe ►)		0	0	0	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item 1)		14,551	53,690	53,690	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons		0	0	
	21	Mortgages and other notes payable (attach schedule)		0	0	
	22	Other liabilities (describe ►)		0	0	
	23	Total liabilities (add lines 17 through 22)		0	0	
Net Assets or Fund Balances	24	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ► <input type="checkbox"/>				
	25	Unrestricted				
	26	Temporarily restricted				
	27	Permanently restricted				
	28	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ► <input checked="" type="checkbox"/>				
	29	Capital stock, trust principal, or current funds				
	30	Paid-in or capital surplus, or land, bldg , and equipment fund				
	31	Retained earnings, accumulated income, endowment, or other funds		14,551	53,690	
	32	Total net assets or fund balances (see page 17 of the instructions)		14,551	53,690	
	33	Total liabilities and net assets/fund balances (see page 17 of the instructions)		14,551	53,690	
	34			14,551	53,690	

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	14,551
2	Enter amount from Part I, line 27a	2	39,139
3	Other increases not included in line 2 (itemize) ►	3	0
4	Add lines 1, 2, and 3	4	53,690
5	Decreases not included in line 2 (itemize) ►	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	53,690

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)			(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a					
b					
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 0	0	0	0		
b 0	0	0	0		
c 0	0	0	0		
d 0	0	0	0		
e 0	0	0	0		
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))		
(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			
a 0	0	0			0
b 0	0	0			0
c 0	0	0			0
d 0	0	0			0
e 0	0	0			0
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		0
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8 }			3		0

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 page 18 of the 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	47,500	18,231	2 605452
2007	983,043	62,930	15 621214
2006	620,100	44,395	13 967789
2005	360,141	31,489	11 437042
2004	347,254	76	4,569,131579

2 Total of line 1, column (d)

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

4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5

5 Multiply line 4 by line 3

6 Enter 1% of net investment income (1% of Part I, line 27b)

7 Add lines 5 and 6

8 Enter qualifying distributions from Part XII, line 4

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18

2	4,612,763076
3	922,552615
4	41,196
5	38,005,478
6	0
7	38,005,478
8	474,500

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)1 a Exempt operating foundations described in section 4940(d)(2), check here ► and enter "N/A" on line 1

Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)

1	0
2	0
3	0
4	0
5	0

2	0
3	0
4	0
5	0

b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► and enter 1% of Part I, line 27b

2	0
3	0
4	0
5	0

6	0
6a	0
6b	
6c	0
6d	

6a	0
6b	
6c	0
6d	

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-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)

5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-

6 Credits/Payments

7	0
8	0
9	0
10	0
11	0

7	0
8	0
9	0
10	0
11	0

7 Total credits and payments Add lines 6a through 6d

8 Enter any penalty for underpayment of estimated tax Check here if Form 2220 is attached

9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid

11 Enter the amount of line 10 to be Credited to 2010 estimated tax ► 0 Refunded ►

Part VII-A Statements Regarding Activities

1 a 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?

Yes

No

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?

1a

X

1b

X

1c

X

1d

X

1e

X

1f

X

1g

X

1h

X

1i

X

1j

X

1k

X

1l

X

1m

X

1n

X

1o

X

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

c Did the foundation file Form 1120-POL for this year?

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year

1a

X

1b

X

1c

X

1d

X

1e

X

1f

X

1g

X

1h

X

1i

X

1j

X

1k

X

1l

X

1m

X

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► \$ _____

2 Has the foundation engaged in any activities that have not previously been reported to the IRS?

2

X

3

X

If "Yes," attach a detailed description of the activities

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

4a

X

4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4b

N/A

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?

5

X

6

X

7

X

If "Yes," attach the statement required by General Instruction T.

6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either

8b

X

8c

X

8d

X

8e

X

8f

X

8g

X

8h

X

8i

X

8j

X

● 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?

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

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

9

X

10

X

11

X

12

X

13

X

14

X

15

X

16

X

17

X

18

X

19

X

20

X

21

X

22

X

23

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24

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25

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69

X

70

X

71

X

72

X

73

X

74

X

75

X

76

X

77

X

78

X

79

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11	X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12	X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► WWW.ALLIANZ.COM/FOUNDATION-NA	13	X
14	The books are in care of ► ALLIANZ FOUNDATION FOR NORTH AMERICA Telephone no ► (301)408-8195 Located at ► 777 SAN MARIN DRIVE, NOVATO, CA ZIP+4 ► 94998-1320		
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	► <input type="checkbox"/>

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly)		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	N/A
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	If "Yes," list the years ► 20_____ , 20_____ , 20_____ , 20_____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions)	2b	N/A
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20_____ , 20_____ , 20_____ , 20_____	3b	N/A
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)	4a	X
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4b	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		

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

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

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

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

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

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

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

b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?

Organizations relying on a current notice regarding disaster assistance check here



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?

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

Yes No

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?
If "Yes" to 6a, file Form 8870

Yes No

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

Yes No

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

Yes No

5b N/A

6b X

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 (see page 22 of the instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE LIST ATTACHED	00	0	0	0
-----	00	0	0	0
-----	00	0	0	0
-----	00	0	0	0

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

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

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



0

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

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		0
		0
		0
		0
		0
		0

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	NONE	
2		
3		
4		

Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2		Amount
1	NONE	
2		
All other program-related investments. See page 24 of the instructions		
3		0
Total. Add lines 1 through 3		0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	
b	Average of monthly cash balances	1b	41,823
c	Fair market value of all other assets (see page 24 of the instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	41,823
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	41,823
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	627
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	41,196
6	Minimum investment return. Enter 5% of line 5	6	2,060

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

1	Minimum investment return from Part X, line 6	1	2,060
2a	Tax on investment income for 2009 from Part VI, line 5	2a	0
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	0
3	Distributable amount before adjustments Subtract line 2c from line 1	3	2,060
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	2,060
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	2,060

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	474,500
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	3a	
a	Suitability test (prior IRS approval required)	3b	0
b	Cash distribution test (attach the required schedule)	4	474,500
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	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)	6	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4		

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

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

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				2,060
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only				
b Total for prior years 20 ____, 20 ____			0	
3 Excess distributions carryover, if any, to 2009		0		
a From 2004	347,250			
b From 2005	358,567			
c From 2006	617,880			
d From 2007	979,896			
e From 2008	46,588			
f Total of lines 3a through e	2,350,181			
4 Qualifying distributions for 2009 from Part XII, line 4 ► \$ 474,500				
a Applied to 2008, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)	0			
d Applied to 2009 distributable amount	472,440			2,060
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:	2,822,621			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
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				
d Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions		0		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	347,250			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	2,475,371			
10 Analysis of line 9.				
a Excess from 2005	358,567			
b Excess from 2006	617,880			
c Excess from 2007	979,896			
d Excess from 2008	46,588			
e Excess from 2009	472,440			

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

Recipient	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
Name and address (home or business)				
<i>a Paid during the year</i> SEE LIST ATTACHED				474,500
Total				► 3a 474,500
<i>b Approved for future payment</i>				
Total				► 3b 0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

1 Program service revenue

- a _____
- b _____
- c _____
- d _____
- e _____
- f _____

g Fees and contracts from government agencies

2 Membership dues and assessments**3 Interest on savings and temporary cash investments****4 Dividends and interest from securities****5 Net rental income or (loss) from real estate**

- a Debt-financed property
- b Not debt-financed property

6 Net rental income or (loss) from personal property**7 Other investment income****8 Gain or (loss) from sales of assets other than inventory****9 Net income or (loss) from special events****10 Gross profit or (loss) from sales of inventory**

11 Other revenue a _____

- b _____
- c _____
- d _____
- e _____

12 Subtotal Add columns (b), (d), and (e)**13 Total. Add line 12, columns (b), (d), and (e)**

(See worksheet in line 13 instructions on page 28 to verify calculations.)

13 _____ 0

	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1		0		0	0
2		0		0	0
3		0		0	0
4		0		0	0
5		0		0	0
6		0		0	0
7		0		0	0
8		0		0	0
9		0		0	0
10		0		0	0
11		0		0	0
12		0		0	0
13		0		0	0

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)
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Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

- a Transfers from the reporting foundation to a noncharitable exempt organization of:
 - (1) Cash
 - (2) Other assets
- b Other transactions:
 - (1) Sales of assets to a noncharitable exempt organization
 - (2) Purchases of assets from a noncharitable exempt organization
 - (3) Rental of facilities, equipment, or other assets
 - (4) Reimbursement arrangements
 - (5) Loans or loan guarantees
 - (6) Performance of services or membership or fundraising solicitations
- c Sharing of facilities, equipment, mailing lists, other assets, or paid employees

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? . . .

Yes No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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

Signature of officer or trustee

Date

Title

Sign Here

**Paid
Repairer's
Use Only**

Preparer's
signature

Date

Check if
self-employed

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

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

514

Phone no.

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

OMB No 1545-0047

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

2009

Name of the organization

ALLIANZ FOUNDATION FOR NORTH AMERICA

Employer identification number

68-0493856

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).

Name of organization

ALLIANZ FOUNDATION FOR NORTH AMERICA

Employer identification number

68-0493856

Part I **Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	ALLIANZ SE KONIGINSTRASSE 28 80802 Foreign State or Province MUNCHEN Foreign Country Germany	\$ 513,639	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
2		\$ 0	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
3		\$ 0	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
4		\$ 0	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
5		\$ 0	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
6		\$ 0	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

ALLIANZ FOUNDATION FOR NORTH AMERICA
CALENDAR YEAR 2009
FORM 990-PF, PAGE 11, PART XV, ITEM 3a

68-0493856

CONTRIBUTIONS TO CHARITABLE ORGANIZATIONS

	<u>RECIPIENTS NAME AND ADDRESS</u>	<u>AMOUNT</u>
a) Paid During the Year		
1	Island Press (fiscal agent for EcoAdapt) 1718 Connecticut Avenue, NW Suite 300 Washington, DC 20009-1148	\$ 70,000
2	Junior Achievement of San Diego and Imperial Counties 4756 Mission Gorge Place San Diego, CA 92120	\$ 50,000
3	Best Buddies 1550 Bryant Street Suite 835 San Francisco, CA 94103-1791	\$ 50,000
4	Teen Living Programs 162 W Hubbard Street Suite 400 Chicago, IL 60654	\$ 50,000
5	Jewish Community Relations Council of New York CAUSE New York (for YouthBridge-NY) 70 West 36th St , Suite 700 New York, NY 10018	\$ 50,000
6	District 202 1601 Nicollet Mall Minneapolis, MN 55403	\$ 25,000
7	The Fiver Children's Foundation 240 West 35th Street, Suite 305 New York, NY 10001	\$ 25,000
8	Lang Youth Medical Program/New York Presbyterian Hospital 3959 Broadway New York, NY 10032	\$ 25,000
9	Project Return 124 Compo Road North Westport, CT 06880-2517	\$ 25,000
10	CASA of Orange County 1615 East 17th Street Suite 100 Santa Ana, CA, 92705	\$ 12,500
11	Great River Greening 35 West Water Street, #201 Saint Paul MN 55107	\$ 12,500
12	PDHRE People's Movement for Human Rights Education 526 West 111th Street Suite 4E New York, NY 10025	\$ 12,500

ALLIANZ FOUNDATION FOR NORTH AMERICA
CALENDAR YEAR 2009
FORM 990-PF, PAGE 11, PART XV, ITEM 3a

68-0493856

CONTRIBUTIONS TO CHARITABLE ORGANIZATIONS

	<u>RECIPIENTS NAME AND ADDRESS</u>	<u>AMOUNT</u>
	a) Paid During the Year	
13	Safe Space 295 Lafayette Street New York, NY 10012-2700	\$ 12,500
14	Youth Venture 1700 North Moore Street Arlington, VA 22209-1921	\$ 12,500
15	Island Press 1718 Connecticut Avenue, NW Suite 300 Washington, DC 20009-1148	\$ 10,000
16	Great River Greening 35 West Water Street, #201 Saint Paul, MN 55107	\$ 10,000
17	The Fiver Children's Foundation 240 West 35th Street, Suite 305 New York, NY 10001	\$ 10,000
18	Jewish Community Relations Council of New York CAUSE New York 70 West 36th St , Suite 700 New York, NY 10018	\$ 10,000
19	Jewish Community Relations Council of New York CAUSE New York 70 West 36th St., Suite 700 New York, NY 10018	\$ 2,000
	TOTAL 2009 CHARITABLE CONTRIBUTIONS	\$ 474,500

ALLIANZ FOUNDATION FOR NORTH AMERICA
CALENDAR YEAR 2009
FORM 990-PF, PAGE 6, PART VIII
OFFICERS AND BOARD MEMBERS

68-0493856

NAME	TITLE	COMPENSATION
Jay S. Ralph	Chairman & President / BM	0
Emilio Galli-Zugaro	Executive Vice President/ BM	0
Christopher Worthley	Executive Director / BM	0
Claudia Knox	Secretary	0
Jeannette Wong	Assistant Secretary	0
Peter Huehne	Board Member	0
Wolfgang Ischinger	Board Member	0
Sabia Schwarzer	Board Member	0
		<hr/> \$0
		<hr/>



> Allianz Group > Corporate Responsibility > Corporate Citizenship > Foundations > Allianz Foundation for North America

Allianz Foundation for North America

Giving Guidelines and Application Procedures

Jul 9, 2009

Giving Guidelines



Supporting Program Development

The Allianz Foundation for North America empowers young people to shape a secure future by partnering with programs that support youth in developing the skills, motivation, perspectives and opportunities they need to lead successful, independent lives of leadership and public service. In all cases, the Foundation's goal is to serve as an impetus for the creation or expansion of sustainable youth programs eligible for continued, long-term funding from other sources.

Criteria for Funding

All programs and projects for which funding is sought must attend to each of seven, equally weighted criteria drawn from the mission and goals of the Allianz Foundation for North America. Specifically, all proposed programs/projects must:

- 1) Empower young people
- 2) To shape a secure future
- 3) For themselves
- 4) And the communities in which they live,
- 5) By helping them become successful,
- 6) Self-reliant, and
- 7) Socially conscious

Please note that, in order to be able to offer special opportunities for youth development, such as mentoring and in-office career skills workshops, our project-related grant making is focused exclusively on cities in which Allianz companies in the NAFTA region maintain head- or major representative offices. These cities are:

New York (NY)

Washington (DC)
Chicago (IL)
Minneapolis (MN)
San Francisco (CA), including also Marin and Sonoma Countries
Newport Beach (CA)
San Diego (CA)
Mexico City, Mexico

Please also note that priority is given to non-profit organizations that are likely to take part in the Allianz Foundation Fellowship Program – see separate program information – after the first proposed grant year. We strongly recommend incorporating a brief but clear vision for such participation into all project proposals.

Grant Cycle

The Allianz Foundation for North America awards 12-month grants once each year, following the annual meeting of the Foundation's Board of Directors, which generally takes place within the first nine months of the calendar year. Grant applicants are notified of action taken by the Board within one week of the annual meeting. Disbursement of all allocated funds to grant recipients follows immediately thereafter.

Grant Range

Grants for program development involve a significant short- to medium-term financial commitment at the discretion of the Foundation Board. Given the limited availability of funds and the broad scope of the Foundation's work throughout North America, grants generally do not exceed 50,000 US dollars, the standard allocation for each new project grant. All decisions on funding are based on a thorough analysis of program need, structure and potential for sustainable social impact.

Funding Period

Grants are eligible for renewal at a lower level of financial commitment after the first year in order to maintain program development while other sources of – and/or solutions for – long-term funding are sought. In general, renewal grants for each successive year, if approved, will not exceed 50 percent of the previous year's grant total. Grants generally may not be renewed for more than two consecutive years following the first-year grant. Our project partners are, however, always welcome to apply for new project grants in the future.

Limitations

The Allianz Foundation for North America does not provide support for:

Individuals
Political parties, candidates or partisan political organizations
General public-sector services
Sectarian religious purposes (e.g., religious instruction, proselytizing)
Fraternal, veteran or sectarian groups serving only, or primarily their own constituencies
Fundraising events
Conferences and workshops
Trips or tours
Capital campaigns
Endowment funds
Medical research
Sporting events
Subscription fees or admission tickets

Application Procedures

Deadlines

All final grant applications must be submitted one month prior to the next scheduled Annual Meeting of the Allianz Foundation board; please contact the Executive Director by email – using the subject line "Meeting Schedule Request" – for information on the board's meeting schedule.

Preliminary Concept Paper

All grant seekers must contact the Executive Director with a one-page project concept paper before submitting a formal grant proposal. This enables us to offer preliminary feedback on the project proposal and clear guidance on subsequent steps in the application process. Each concept paper must include a clear, concise description of the plan for the creation or expansion of a particular project or program component that would be made possible with a grant of 50,000 US dollars our standard allocation for first-year project grants. The opportunity to discuss a preliminary concept paper is intended to help protect valuable resources of time and money at non-profit organizations by ensuring – before submission – that final applications adequately fit our mission and guidelines. All concept papers must be submitted by email, using the subject line "Concept Paper".

Final Application Package

Upon completion of discussions on the preliminary concept paper, grant seekers may, at the discretion of the Foundation's Executive Director, submit a final, grant application package. All applications must include a narrative proposal of no more than five pages summarizing

- The specific program for which funding is requested, including research background on social issues being addressed, the number of young people to be served and/or engaged in the program, as well as concrete plans for measuring success and seeking future funding;
- A brief description of all organizations involved in planning and running the program or project.

In addition, the proposal must contain:

- A project budget showing all expenses and other income sources, if applicable. Please use a three-column format reflecting total expenses, the proposed allocation of the Allianz Foundation grant under consideration, and other income and/or unmet need;
- A current organizational balance sheet and income statement (audited, if available);
- A list of other funding sources and amounts from the past two years;
- A list of the current board of directors with affiliations and other key staff members for each organization involved in the proposed program or project;
- A copy of the organization's IRS Tax Exemption letter under Section 501 (c) (3) of the Internal Revenue Code, or evidence of the organization's qualifications under Section 170 (c) (1) of the Internal Revenue Code designating the organization as a non-profit, tax-exempt entity.

Please also submit electronic copies of as many of these materials as possible, using the email subject line "Final Proposal Documents".

Contact

To learn more about the work of the Allianz Foundation for North America, or to submit a preliminary concept paper, please use the contact information above.

>

Please also remember to use the appropriate email subject line(s) for all correspondence, as discussed above.

For further information

- > Allianz Foundation for North America
- > Current Projects

> Allianz Foundation Fellowship Program

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Application for Extension of Time To File an
Exempt Organization Return

► File a separate application for each return.

- If you are filing for an Automatic 3-Month Extension, complete only Part I and check this box. ►
- If you are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

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

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

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

Type or print	Name of Exempt Organization ALLIANZ FOUNDATION FOR NORTH AMERICA	Employer identification number 68-0493856
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P.O. box, see instructions 777 SAN MARIN DRIVE	
	City, town or post office, state, and ZIP code For a foreign address, see instructions. NOVATO	CA 94998

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

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

- The books are in the care of ► **CONTROLLER**

Telephone No ► (415)899-2000 FAX No. ► (415)899-3137
 • If the organization does not have an office or place of business in the United States, check this box. ►
 • If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box. ► If it is for part of the group, check this box. ► and attach a list with the names and EINs of all members the extension will cover.

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 8/15/2010, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
 - calendar year 2009 or
 - tax year beginning _____, and ending _____
- 2 If this tax year is for less than 12 months, check reason: Initial return Final return Change in accounting period

3 a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	\$
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$
c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$

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