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Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning

, and ending

G Check all that apply

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeUse the IRS
label.
Otherwise,
print
or type.
See Specific
Instructions

Name of foundation

JOHN AND MARILYN WELLS
FAMILY FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)

Room/suite

C/O SINGER BURKE&CO, 6345 BALBOA BL #375

City or town, state, and ZIP code

ENCINO, CA 91316

A Employer identification number

68-0526427

B Telephone number

(818) 774-1000

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundation

I Fair market value of all assets at end of year

J Accounting method ☒ Cash ☐ Accrual

(from Part II, col. (c), line 16)

☐ Other (specify)

▶ \$ 10,270,618. (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))

(a) Revenue and
expenses per books(b) Net investment
income(c) Adjusted net
income(d) Disbursements
for charitable purposes
(cash basis only)

1 Contributions, gifts, grants, etc., received

500.

N/A

2 Check ☒ if the foundation is not required to attach Sch B

3 Interest on savings and temporary cash investments

175,158.

167,316.

STATEMENT 2

4 Dividends and interest from securities

96,065.

96,065.

STATEMENT 3

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

-84,967.

STATEMENT 1

b Gross sales price for all assets on line 6a 4,389,609.

7 Capital gain net income (from Part IV, line 2)

23,435.

8 Net short-term capital gain

9 Income modifications

10a Gross sales (less returns and allowances)

RECEIVED

b Less Cost of goods sold

c Gross profit or (loss)

11 Other income

12 Total. Add lines 1 through 11

186,756.

286,816.

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

c Other professional fees

17 Interest

18 Taxes

STMT 4

1,756.

0.

0.

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses

STMT 5

13,564.

8,463.

5,101.

24 Total operating and administrative expenses. Add lines 13 through 23

15,320.

8,463.

5,101.

25 Contributions, gifts, grants paid

534,099.

534,099.

26 Total expenses and disbursements. Add lines 24 and 25

549,419.

8,463.

539,200.

27 Subtract line 26 from line 12

-362,663.

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

278,353.

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		4,133.	10,807.	10,807.		
	2 Savings and temporary cash investments		224,825.	455,198.	455,198.		
	3 Accounts receivable ▶						
	Less allowance for doubtful accounts ▶						
	4 Pledges receivable ▶						
	Less allowance for doubtful accounts ▶						
	5 Grants receivable						
	6 Receivables due from officers, directors, trustees, and other disqualified persons						
	7 Other notes and loans receivable ▶						
	Less allowance for doubtful accounts ▶						
	8 Inventories for sale or use						
	9 Prepaid expenses and deferred charges						
	10a Investments - U S and state government obligations STMT 6		1,970,900.	2,481,346.	2,512,575.		
	b Investments - corporate stock STMT 7		1,467,449.	1,193,420.	1,490,841.		
	c Investments - corporate bonds STMT 8		1,442,594.	1,375,758.	1,436,524.		
11 Investments - land, buildings, and equipment basis ▶							
Less accumulated depreciation ▶							
12 Investments - mortgage loans							
13 Investments - other STMT 9		4,470,051.	3,700,760.	4,364,673.			
14 Land, buildings, and equipment basis ▶							
Less accumulated depreciation ▶							
15 Other assets (describe ▶)							
16 Total assets (to be completed by all filers)		9,579,952.	9,217,289.	10,270,618.			
Liabilities	17 Accounts payable and accrued expenses						
	18 Grants payable						
	19 Deferred revenue						
	20 Loans from officers, directors, trustees, and other disqualified persons						
	21 Mortgages and other notes payable						
	22 Other liabilities (describe ▶)						
23 Total liabilities (add lines 17 through 22)		0.	0.				
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>						
	24 Unrestricted						
	25 Temporarily restricted						
	26 Permanently restricted						
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>						
	27 Capital stock, trust principal, or current funds		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		9,579,952.	9,217,289.			
30 Total net assets or fund balances		9,579,952.	9,217,289.				
31 Total liabilities and net assets/fund balances		9,579,952.	9,217,289.				

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	9,579,952.
2 Enter amount from Part I, line 27a	2	-362,663.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	9,217,289.
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	9,217,289.

Part IV Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 4,389,609.		4,366,174.	23,435.

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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			23,435.

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	23,435.
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	600,540.	10,018,945.	.059940
2007	387,550.	11,302,855.	.034288
2006	312,450.	8,352,136.	.037410
2005	65,900.	6,249,940.	.010544
2004	305,940.	3,597,907.	.085033

2 Total of line 1, column (d)	2	.227215
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	.045443
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	9,251,276.
5 Multiply line 4 by line 3	5	420,406.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,784.
7 Add lines 5 and 6	7	423,190.
8 Enter qualifying distributions from Part XII, line 4	8	539,200.

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.

JOHN AND MARILYN WELLS
FAMILY FOUNDATION**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	2,784.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	2,784.
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	2,784.
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a 4,782.		
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	4,782.	
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	1,998.	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax	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
b 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
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input 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"/> CA		
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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FAMILY FOUNDATION

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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? Website address ► N/A	13	X	
14	The books are in care of ► SINGER BURKE & COMPANY Telephone no ► (818) 774-1000 Located at ► 6345 BALBOA BLVD., SUITE 375, ENCINO, CA ZIP+4 ► 91316			
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	N/A	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years ►		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b X

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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

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?

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
JOHN WELLS C/O SINGER BURKE & CO, 6345 BALBOA BL ENCINO, CA 91316	PRESIDENT, CHAIRMAN OF	BD		
MARILYN WELLS C/O SINGER BURKE & CO, 6345 BALBOA BL ENCINO, CA 91316	CFO/TREASURER, SECRETARY			
	0.50	0.	0.	0.
	0.50	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 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	7,273,889.
b	Average of monthly cash balances	1b	627,428.
c	Fair market value of all other assets	1c	1,490,841.
d	Total (add lines 1a, b, and c)	1d	9,392,158.
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	9,392,158.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	140,882.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	9,251,276.
6	Minimum investment return. Enter 5% of line 5	6	462,564.

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	462,564.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	2,784.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	2,784.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	459,780.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	459,780.
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	459,780.

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	539,200.
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	539,200.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	2,784.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	536,416.

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				459,780.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008 40,961.				
f Total of lines 3a through e	40,961.			
4 Qualifying distributions for 2009 from Part XII, line 4 \$ 539,200.				
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				459,780.
e Remaining amount distributed out of corpus	79,420.			
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	120,381.			
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	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	120,381.			
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008 40,961.				
e Excess from 2009 79,420.				

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

- 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling ▶
- b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see the instructions.)

1 Information Regarding Foundation Managers:

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

SEE STATEMENT 10

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

NONE

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

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

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

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

- c Any submission deadlines

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

3 Grants and Contributions Paid During the Year or Approved for Future Payment

923611 02-02-10

Part XVII

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

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

[illegible]

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

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

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

Sign Here

Signature of officer or trustee

Date _____

Title

Preparer's
signature

Date _____

☐ Check if self-employed

Preparer's identifying number

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

SINGER BURKE & COMPANY LLP, CPA'S
6345 BALBOA BLVD, # 375
ENCINO, CALIFORNIA 91316-9515

EIN ►

Phone no (818) 774-1000

Form **990-PF** (2009)

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	PUBLICLY TRADED SECURITIES	P	VARIOUS	VARIOUS
b	PUBLICLY TRADED SECURITIES	P	VARIOUS	VARIOUS
c	PUBLICLY TRADED SECURITIES	P	VARIOUS	VARIOUS
d	PUBLICLY TRADED SECURITIES	P	VARIOUS	VARIOUS
e	PUBLICLY TRADED SECURITIES	D	VARIOUS	VARIOUS
f	CAPITAL GAINS DIVIDENDS			
g				
h				
i				
j				
k				
l				
m				
n				
o				

(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 1,195,670.		1,166,601.	29,069.
b 1,557,491.		1,558,998.	-1,507.
c 618,279.		556,139.	62,140.
d 595,243.		715,102.	-119,859.
e 418,830.		369,334.	49,496.
f 4,096.			4,096.
g			
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			29,069.
b			-1,507.
c			62,140.
d			-119,859.
e			49,496.
f			4,096.
g			
h			
i			
j			
k			
l			
m			
n			
o			

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	23,435.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8 }	3	N/A

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

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PUBLICLY TRADED SECURITIES	PURCHASED	VARIOUS	VARIOUS
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.
(F) GAIN OR LOSS			
1,195,670.	1,166,601.	0.	0.
			29,069.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PUBLICLY TRADED SECURITIES	PURCHASED	VARIOUS	VARIOUS
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.
(F) GAIN OR LOSS			
1,557,491.	1,558,998.	0.	0.
			-1,507.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PUBLICLY TRADED SECURITIES	PURCHASED	VARIOUS	VARIOUS
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.
(F) GAIN OR LOSS			
618,279.	556,139.	0.	0.
			62,140.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PUBLICLY TRADED SECURITIES				PURCHASED	VARIOUS	VARIOUS
	595,243.	715,102.	0.			-119,859.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PUBLICLY TRADED SECURITIES				DONATED	VARIOUS	VARIOUS
	418,830.	477,736.	0.			-58,906.

CAPITAL GAINS DIVIDENDS FROM PART IV	4,096.
TOTAL TO FORM 990-PF, PART I, LINE 6A	-84,967.

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

SOURCE	AMOUNT
SCHWAB-1344	3,920.
SCHWAB-9186	171,238.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	175,158.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 3

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
CITY NATIONAL SECURITIES	14.	0.	14.
SCHWAB-1344	100,075.	4,096.	95,979.
SCHWAB-9186	72.	0.	72.
TOTAL TO FM 990-PF, PART I, LN 4	100,161.	4,096.	96,065.

FORM 990-PF	TAXES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
STATE TAXES	10.	0.		0.	
FOREIGN TAXES	1,128.	0.		0.	
FEDERAL EXCISE TAX	618.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	1,756.	0.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INVESTMENT MANAGEMENT FEES	8,463.	8,463.		0.	
ADMINISTRATIVE EXPENSES	5,101.	0.		5,101.	
TO FORM 990-PF, PG 1, LN 23	13,564.	8,463.		5,101.	

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS			STATEMENT	6
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE	
U.S. GOVERNMENT OBLIGATIONS	X		2,248,543.	2,277,896.	
STATE AND MUNICIPAL OBLIGATIONS		X	232,803.	234,679.	
TOTAL U.S. GOVERNMENT OBLIGATIONS			2,248,543.	2,277,896.	
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			232,803.	234,679.	
TOTAL TO FORM 990-PF, PART II, LINE 10A			2,481,346.	2,512,575.	

FORM 990-PF	CORPORATE STOCK	STATEMENT	7
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE INVESTMENTS	1,193,420.	1,490,841.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,193,420.	1,490,841.

FORM 990-PF	CORPORATE BONDS	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	1,375,758.	1,436,524.
TOTAL TO FORM 990-PF, PART II, LINE 10C	1,375,758.	1,436,524.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	9
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
EQUITY FUNDS & CORPORATE STOCKS	COST	3,700,760.	4,364,673.
TOTAL TO FORM 990-PF, PART II, LINE 13		3,700,760.	4,364,673.

FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT	10
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NAME OF MANAGER

JOHN WELLS
MARILYN WELLS

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 11

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
ACLU FOUNDATION OF SOUTHERN CALIFORNIA 125 BROAD STREET, 18TH FLR NEW YORK, NY 10004	NONE UNRESTRICTED	PUBLIC CHARITY	1,000.
ALL SAINTS CHURCH 132 NORTH EUCLID AVE PASADENA, CA 91101	NONE UNRESTRICTED	PUBLIC CHARITY	5,000.
ALZHEIMER'S ASSOCIATION 225 N. MICHIGAN AVE. #1700 CHICAGO, IL 60601	NONE UNRESTRICTED	PUBLIC CHARITY	500.
AMNESTY INTERNATIONAL USA 5 PENN PLAZA, 14TH FLOOR NEW YORK, NY 10001	NONE UNRESTRICTED	PUBLIC CHARITY	250.
ARTS HIGH FOUNDATION GUILD 5151 STATE UNIVERSITY DR. LOS ANGELES, CA 90032	NONE UNRESTRICTED	PUBLIC CHARITY	250.
BIG BROTHERS BIG SISTERS OF GREATER LOS ANGELES AND THE INLAND EMPIRE - 800 S. FIGUEROA ST, SUITE 620 LOS ANGELES, CA 90017	NONE UNRESTRICTED	PUBLIC CHARITY	10,000.
BRADY CENTER TO PREVENT GUN VIOLENCE PO BOX 96627 WASHINGTON, DC 20077	NONE UNRESTRICTED	PUBLIC CHARITY	100.
CAMP RONALD MCDONALD 1954 COTNER AVE LOS ANGELES, CA 90025	NONE UNRESTRICTED	PUBLIC CHARITY	2,295.

JOHN AND MARILYN WELLS FAMILY FOUNDATION

68-0526427

CHILDREN'S DEFENSE FUND 25 E STREET, NW WASHINGTON, DC 20001	NONE UNRESTRICTED	PUBLIC CHARITY	6,000.
CHILDRENS' HOSPITAL OF LOS ANGELES 4650 SUNSET BLVD #29 LOS ANGELES, CA 90027	NONE UNRESTRICTED	PUBLIC CHARITY	1,000.
DCFS TRUST FUND 425 SHATTO PLACE LOS ANGELES, CA 90020	NONE UNRESTRICTED	PUBLIC CHARITY	1,000.
DOCTORS WITHOUT BORDERS 333 SEVENTH AVE, 2ND FLOOR NEW YORK, NY 10001	NONE UNRESTRICTED	PUBLIC CHARITY	1,000.
FRIENDS OF THE LOS ANGELES PHILHARMONIC 151 S. GRAND AVE LOS ANGELES, CA 90012	NONE UNRESTRICTED	PUBLIC CHARITY	46,500.
GRACE CENTER P.O. BOX 40250 PASADENA, CA 91114	NONE UNRESTRICTED	PUBLIC CHARITY	50,000.
GREATER LOS ANGELES ZOO ASSOCIATION 5333 ZOO DR LOS ANGELES, CA 90027	NONE UNRESTRICTED	PUBLIC CHARITY	204.
HABITAT FOR HUMANITY INTERNATIONAL PO BOX 1729 AMERICUS, GA 31709	NONE UNRESTRICTED	PUBLIC CHARITY	1,000.
HEIFER INTERNATIONAL P.O. BOX 1692 MERRIFIELD, VA 22116	NONE UNRESTRICTED	PUBLIC CHARITY	5,000.
HUMAN RIGHTS WATCH 13107 VENTURA BLVD, SUITE 206 STUDIO CITY, CA 91604	NONE UNRESTRICTED	PUBLIC CHARITY	4,050.

JOHN AND MARILYN WELLS FAMILY FOUNDATION

68-0526427

HUMANITAS DRAMA FELLOWSHIP 17575 PACIFIC COAST HWY P.O. BOX 861 PACIFIC PALISADES, CA 90272	NONE UNRESTRICTED	PUBLIC CHARITY	20,000.
JESSE COOPER FOUNDATION P.O. BOX 390 KINGSTON, MA 02364	NONE UNRESTRICTED	PUBLIC CHARITY	2,500.
KAUAI FOOD BANK 3285 WAAPA ROAD, SUITE A LIHUE, HI 96766	NONE UNRESTRICTED	PUBLIC CHARITY	500.
KCET P.O. BOX 469028 ESCONDIDO, CA 92046	NONE UNRESTRICTED	PUBLIC CHARITY	250.
KCRW 1900 PICO BLVD SANTA MONICA, CA 90405	NONE UNRESTRICTED	PUBLIC CHARITY	1,000.
KUSC P.O. BOX 77913 LOS ANGELES, CA 90007	NONE UNRESTRICTED	PUBLIC CHARITY	250.
LOS ANGELES POLICE FOUNDATION 515 S. FLOWER ST., STE 1680 LOS ANGELES, CA 90071	NONE UNRESTRICTED	PUBLIC CHARITY	5,000.
MOTION PICTURE & TELEVISION FUND 22212 VENTURA BL, #300 WOODLAND HILLS, CA 91364	NONE UNRESTRICTED	PUBLIC CHARITY	10,000.
NEW YORK WOMEN IN FILM & TV 6 EAST 39TH STREET STE 1200 NEW YORK, NY 10016	NONE UNRESTRICTED	PUBLIC CHARITY	2,500.
NGA, INC. 3699 WILSHIRE BLVD., SUITE 675 LOS ANGELES, CA 90010	NONE UNRESTRICTED	PUBLIC CHARITY	1,000.

JOHN AND MARILYN WELLS FAMILY FOUNDATION

68-0526427

OFFICE OF THE AMERICAS 8124 W, 3RD STREET STE 202 LOS ANGELES, CA 90048	NONE UNRESTRICTED	PUBLIC CHARITY	1,000.
PERFORMING ARTS STUDIO WEST 438 S. MARKET STREET INGELWOOD, CA 90301	NONE UNRESTRICTED	PUBLIC CHARITY	500.
PLANNED PARENTHOOD ACTION FUND INC 434 W 33RD ST NEW YORK, NY 10001	NONE UNRESTRICTED	PUBLIC CHARITY	500.
ST JAMES EPISCOPAL SCHOOL 625 S. ST. ANDREWS PLACE LOS ANGELES, CA 90005	NONE UNRESTRICTED	EDUCATIONA INSTITUTIO	220,000.
THE ALLIANCE FOR CHILDREN'S RIGHTS 3333 WILSHIRE BLVD., STE 550 LOS ANGELES, CA 90010	NONE UNRESTRICTED	PUBLIC CHARITY	6,000.
THE BLANK THEATER 6500 SANTA MONICA BLVD. LOS ANGELES, CA 90038	NONE UNRESTRICTED	PUBLIC CHARITY	10,000.
THE EBELL OF LOS ANGELES 743 SOUTH LUCERNE BLVD. LOS ANGELES, CA 90005	NONE UNRESTRICTED	PUBLIC CHARITY	500.
THE FRIENDS OF THE SABAN FREE CLINIC 8405 BEVERLY BLVD. LOS ANGELES, CA 90048	NONE UNRESTRICTED	PUBLIC CHARITY	1,500.
THE MAPLE COUNSELING CENTER 9107 WILSHIRE BLVD. BEVERLY HILLS, CA 90210	NONE UNRESTRICTED	PUBLIC CHARITY	500.
THE RAPE FOUNDATION 1223 WILSHIRE BLVD, #410 SANTA MONICA, CA 90403	NONE UNRESTRICTED	PUBLIC CHARITY	25,000.

JOHN AND MARILYN WELLS FAMILY FOUNDATION

68-0526427

THE SAN JUAN PRESERVATION TRUST P.O. BOX 327 LOPEZ ISLAND, WA 98261	NONE UNRESTRICTED	PUBLIC CHARITY	250.
THE TREVOR PROJECT, INC. 8950 W OLYMPIC BLVD, #197 BEVERLY HILLS, CA 90211	NONE UNRESTRICTED	PUBLIC CHARITY	2,700.
THE WRITERS GUILD FOUNDATION SHAVELSON-WEBB LIBRARY 7000 W. 3RD ST LOS ANGELES, CA 90048	NONE UNRESTRICTED	PUBLIC CHARITY	5,000.
TREEPEOPLE 12601 MULHOLLAND DR BEVERLY HILLS, CA 90210	NONE UNRESTRICTED	PUBLIC CHARITY	100.
UNITED FRIENDS OF THE CHILDREN 1055 WILSHIRE BLVD, #1955 LOS ANGELES, CA 90017	NONE UNRESTRICTED	PUBLIC CHARITY	29,900.
UNITED NEGRO COLLEGE FUND 8260 WILLOW OAKS CORPORATE DRIVE FAIRFAX, VA 22031	NONE UNRESTRICTED	PUBLIC CHARITY	1,000.
UNITED STATES FUND FOR UNICEF 125 MAIDEN LANE NEW YORK, NY 10038	NONE UNRESTRICTED	PUBLIC CHARITY	9,500.
VAIL MOUNTAIN SCHOOL 3000 BOOTH FALLS RD VAIL, CO 81657	NONE UNRESTRICTED	EDUCATIONA INSTITUTIO	10,000.
VAIL VALLEY FOUNDATION P.O. BOX 309 VAIL, CO 81658	NONE UNRESTRICTED	PUBLIC CHARITY	1,000.
VENICE FAMILY CLINIC 604 ROSE AVE VENICE, CA 90291	NONE UNRESTRICTED	PUBLIC CHARITY	20,000.

JOHN AND MARILYN WELLS FAMILY FOUNDATION

68-0526427

WRIGHT INSTITUTE LOS ANGELES NONE
TWO BRATTLE SQUARE LOS ANGELES, UNRESTRICTED
CA 90035

PUBLIC 10,000.
CHARITY

YOUNG PLAYWRIGHTS INC NONE
P.O. BOX 5134 NEW YORK, NY UNRESTRICTED
10185

PUBLIC 1,000.
CHARITY

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

534,099.