Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning , 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: THE JOSEPH R. PARKER FOUNDATION

Number and street (or P O box number if mail is not delivered to street address): P.O. BOX 1633 — Room/suite:

City or town, state, and ZIP code: ROSS, CA 94957

A Employer identification number: 68-6084391

B Telephone number: (415)925-4360

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 ▶ [ ]

H Check type of organization: [X] Section 501(c)(3) exempt private foundation
[ ] Section 4947(a)(1) nonexempt charitable trust [ ] Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ [ ]

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)* ▶$ 2,092,419.

J Accounting method: [ ] Cash [ ] Accrual [X] Other (specify) MODIFIED CASH
(Part I, column (d) must be on cash basis)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ [ ]

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue				
1 Contributions, gifts, grants, etc., received	0.		N/A	
2 Check ▶ [X] if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	17.	17.		STATEMENT 1
4 Dividends and interest from securities	64,802.	64,802.		STATEMENT 2
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	-87,840.			
b Gross sales price for all assets on line 6a 731,182.				
7 Capital gain net income (from Part IV, line 2)		0.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss)				
11 Other income				
12 **Total.** Add lines 1 through 11	-23,021.	64,819.		
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc	12,189.	7,314.		4,875.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees				
b Accounting fees STMT 3	1,700.	425.		1,375.
c Other professional fees				
17 Interest				
18 Taxes STMT 4	1,028.	616.		0.
19 Depreciation and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses STMT 5	16,600.	15,252.		1,338.
24 **Total operating and administrative expenses** Add lines 13 through 23	31,517.	23,607.		7,588.
25 Contributions, gifts, grants paid	121,600.			121,600.
26 **Total expenses and disbursements.** Add lines 24 and 25	153,117.	23,607.		129,188.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-176,138.			
b **Net investment income** (if negative, enter -0-)		41,212.		
c **Adjusted net income** (if negative, enter -0-)			N/A	

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02-02-10 LHA **For Privacy Act and Paperwork Reduction Act Notice, see the instructions.**

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Form **990-PF** (2009)

09580510 755359 18-14138 2009.03050 THE JOSEPH R. PARKER FOUNDA 18-141F1

Part II Balance Sheets

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

		Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1 Cash - non-interest-bearing	-9.		
	2 Savings and temporary cash investments	510,237.	116,285.	116,285.
	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	1,240.	808.	808.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 6	972,607.	901,036.	1,160,419.
	c Investments - corporate bonds STMT 7	500,629.	790,437.	814,907.
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶ 200.			
	Less accumulated depreciation STMT 8 ▶ 200.			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers)	1,984,704.	1,808,566.	2,092,419.
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** ▶ [X] **and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted	1,984,704.	1,808,566.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ [ ] **and complete lines 27 through 31.**			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 **Total net assets or fund balances**	1,984,704.	1,808,566.	
	31 **Total liabilities and net assets/fund balances**	1,984,704.	1,808,566.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,984,704.
2	Enter amount from Part I, line 27a	2	-176,138.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	1,808,566.
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	1,808,566.

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	NORTHERN TRUST (DETAIL ATTACHED)	P	VARIOUS	VARIOUS
b	NORTHERN TRUST (DETAIL ATTACHED)	P	VARIOUS	VARIOUS
c	CAPITAL GAINS DIVIDENDS			
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	297,324.		324,542.	-27,218.
b	431,212.		494,480.	-63,268.
c	2,646.			2,646.
d				
e				

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				-27,218.
b				-63,268.
c				2,646.
d				
e				

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7 } 2 -87,840.

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	124,443.	2,536,828.	.049055
2007	153,502.	2,803,554.	.054753
2006	124,106.	2,522,419.	.049201
2005	120,973.	2,639,136.	.045838
2004	127,374.	2,674,398.	.047627

2	**Total** of line 1, column (d)	2	.246474
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	.049295
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,969,753.
5	Multiply line 4 by line 3	5	97,099.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	412.
7	Add lines 5 and 6	7	97,511.
8	Enter qualifying distributions from Part XII, line 4	8	129,188.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ______ **(attach copy of letter if necessary-see instructions)**				
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☒ and enter 1% of Part I, line 27b			1	412.
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	412.
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	412.
6 Credits/Payments:				
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	1,120.		
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	1,120.
8 Enter any **penalty** for underpayment of estimated tax. Check here ☐ 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	708.
11 Enter the amount of line 10 to be: **Credited to 2010 estimated tax** ▶	708.	**Refunded** ▶	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?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?	1b		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?	1c		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ $ 0. (2) On foundation managers. ▶ $ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 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*	2		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*	3		X
4a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		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?	6	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*	7	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ 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*	8b	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*	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ HTTP://AG.CA.GOV/CHARITIES/

14 The books are in care of ▶ ECKHOFF ACCOUNTANCY CORPORATION Telephone no. ▶ (415) 499-9400
Located at ▶ 145 N REDWOOD DRIVE, SAN RAFAEL, CA ZIP+4 ▶ 94903

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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
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? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ 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)? ☐ Yes ☒ 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.) ☐ Yes ☒ 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)? N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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? ☐ Yes ☒ 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? ☐ Yes ☒ 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

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 (No)

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? 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
PAUL EVELOFF P.O. BOX 1633 ROSS, CA 94957	TRUSTEE 2.00	4,063.	0.	0.
JOAN M. WOODSON 2961 W. LONG DRIVE, UNIT E LITTLETON, CO 80120	TRUSTEE 2.00	4,063.	0.	0.
D.K. MACDONALD 57 PASEO WAY GREENBRAE, CA 94904	TRUSTEE 2.00	4,063.	0.	0.

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

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

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

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		0

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

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

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 ▶	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities		1a	1,630,927.
b	Average of monthly cash balances		1b	368,822.
c	Fair market value of all other assets		1c	
d	**Total** (add lines 1a, b, and c)		1d	1,999,749.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0.		
2	Acquisition indebtedness applicable to line 1 assets		2	0.
3	Subtract line 2 from line 1d		3	1,999,749.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	29,996.
5	**Net value of noncharitable-use assets**. Subtract line 4 from line 3. Enter here and on Part V, line 4		5	1,969,753.
6	**Minimum investment return** Enter 5% of line 5		6	98,488.

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	98,488.
2a	Tax on investment income for 2009 from Part VI, line 5	2a 412.		
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b		
c	Add lines 2a and 2b		2c	412.
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	98,076.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	98,076.
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	98,076.

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	129,188.
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	129,188.
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	412.
6	**Adjusted qualifying distributions**. Subtract line 5 from line 4	6	128,776.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				98,076.
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 10,949.				
e From 2008				
f **Total** of lines 3a through e	10,949.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ $ 129,188.				
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				98,076.
e Remaining amount distributed out of corpus	31,112.			
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	42,061.			
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	42,061.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007 10,949.				
d Excess from 2008				
e Excess from 2009 31,112.				

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

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

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

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

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

1 **Information Regarding Foundation Managers:**

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

NONE

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

NONE

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

Check here ▶ [X] 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:

N/A

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

N/A

c Any submission deadlines:

N/A

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

N/A

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
SEE STATEMENT 9				
Total			▶ 3a	121,600.
b *Approved for future payment*				
NONE				
Total			▶ 3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
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			14	17.	
4 Dividends and interest from securities			18	64,802.	
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			18	-87,840.	
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)		0.		-23,021.	0.

13 Total Add line 12, columns (b), (d), and (e) 13 -23,021.

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

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).
	N/A

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.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

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		

Sign Here

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 5/12/2010 | Title Trustee

Paid Preparer's Use Only

Preparer's signature	THOMAS E. MARTZ, CPA	Date 05/10/10	Check if self-employed ☐	Preparer's identifying number
Firm's name (or yours if self-employed), address, and ZIP code	ECKHOFF ACCOUNTANCY CORP. 145 NORTH REDWOOD DRIVE SAN RAFAEL, CA 94903-1974	EIN	Phone no. 415-499-9400	

Depreciation and Amortization Detail FORM 990-PF PAGE 1 990-PF

Asset Number	Description of property							
	Date placed in service	Method/ IRC sec.	Life or rate	Line No.	Cost or other basis	Basis reduction	Accumulated depreciation/amortization	Current year deduction
1	ORGANIZATION COSTS							
	010193	248	60M	43	200.		200.	0.
	* TOTAL 990-PF PG 1 DEPR & AMORT							
					200.	0.	200.	0.

916261 04-24-09

\# - Current year section 179 (D) - Asset disposed

2009 Tax Information Statement

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☐ *Corrected* ☐ **2nd TIN notice**

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P.O. BOX 1633
ROSS, CA 94957-1633

NORTHERN TRUST, NA
P.O. BOX 803878
CHICAGO, IL 60680

2009 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
Short Term Sales								
150 0000	30161N101	EXELON CORP	10/28/2008	01/14/2009	7,736 63	7,380 00	356 63	0 00
95 0000	760975102	RESEARCH IN MOTION LTD	10/28/2008	01/14/2009	4,300.44	4,119 20	181 24	0 00
215 0000	149123101	CATERPILLAR INC	10/28/2008	01/27/2009	7,055 96	7,071 35	-15 39	0 00
6839 9500	665130100	MFB NORTHN MID CAP INDEX FD FD	10/28/2008	02/20/2009	41,928 86	50,000 00	-8,071 14	0 00
4125 4100	665162723	MFB NORTHN FDS SMALL CAP INDEX FD	10/28/2008	02/20/2009	18,523 10	25,000 00	-6,476 90	0 00
115 0000	001055102	AFLAC INC	10/28/2008	03/03/2009	1,599.64	4,450 50	-2,850.86	0 00
240 0000	002824100	ABBOTT LABORATORIES	10/28/2008	03/03/2009	11,011 14	12,683 04	-1,671 90	0 00
215 0000	00724F101	ADOBE SYS INC	10/28/2008	03/03/2009	3,427.10	5,314.80	-1,887 70	0 00
115 0000	009158106	AIR PRODUCTS & CHEMICALS INC	10/28/2008	03/03/2009	5,028 92	5,430 30	-401 38	0 00
45 0000	037833100	APPLE COMPUTER INC	10/28/2008	03/03/2009	3,985 63	4,260 60	-274 97	0 00
155 0000	071813109	BAXTER INTL INC	10/28/2008	03/03/2009	8,038 25	8,825 70	-787 45	0 00
135 0000	075887109	BECTON DICKINSON & CO	10/28/2008	03/03/2009	8,723 65	8,662 60	61.05	0 00
315 0000	17275R102	CISCO SYS INC	04/22/2008	03/03/2009	4,539 12	7,824 60	-3,285 48	0 00
90 0000	22160K105	COSTCO WHSL CORP NEW	10/28/2008	03/03/2009	3,675 58	4,889 70	-1,214 12	0 00
210 0000	254687106	WALT DISNEY CO	10/28/2008	03/03/2009	3,427 18	4,638 90	-1,211 72	0 00
190 0000	291011104	EMERSON ELECTRIC CO	10/28/2008	03/03/2009	4,780 37	5,690 50	-910 13	0 00

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ROSS, CA 94957-1633

NORTHERN TRUST, NA
P.O BOX 803878
CHICAGO, IL 60680

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
100 0000	30161N101	EXELON CORP	10/28/2008	03/03/2009	4,463 97	4,920 00	-456 03	0 00
120 0000	302571104	FPL GROUP INC	10/28/2008	03/03/2009	5,185 17	5,013 60	171 57	0 00
25 0000	336433107	FIRST SOLAR INC COM	10/28/2008	03/03/2009	2,753.23	2,539 00	214 23	0 00
235 0000	428236103	HEWLETT PACKARD CO COM	VARIOUS	03/03/2009	6,612 86	7,958 82	-1,345 96	0 00
135 0000	450911102	ITT INDS INC	10/28/2008	03/03/2009	4,666.92	5,130 43	-463.51	0 00
290 0000	46625H100	J P MORGAN CHASE & CO	10/28/2008	03/03/2009	6,000 07	9,790 40	-3,790 33	0 00
170 0000	487836108	KELLOGG CO	10/28/2008	03/03/2009	6,468 46	8,229 70	-1,761 24	0 00
90 0000	500255104	KOHLS CORP	01/27/2009	03/03/2009	3,065 38	3,381.50	-316 12	0 00
255 0000	580135101	MC DONALDS CORP COMMON STOCK, NO PAR	10/28/2008	03/03/2009	13,344 08	13,665 45	-321 37	0 00
215 0000	58405U102	MEDCO HEALTH SOLUTIONS INC	10/28/2008	03/03/2009	8,309 70	6,831 75	1,477 95	0 00
135 0000	595017104	MICROCHIP TECHNOLOGY INC	10/28/2008	03/03/2009	2,392 19	3,153 60	-761 41	0 00
75 0000	637071101	NATIONAL-OILWELL INC	10/28/2008	03/03/2009	1,807 49	1,775 25	32.24	0 00
165 0000	69331C108	PG&E CORP	10/28/2008	03/03/2009	6,261 71	5,809 65	452 06	0 00
80 0000	774341101	ROCKWELL COLLINS INC COM	10/28/2008	03/03/2009	2,291 19	2,622 40	-331.21	0 00
610 0000	808513105	SCHWAB CHARLES CORP COMMON STOCK NEW	10/28/2008	03/03/2009	7,338 26	9,698 51	-2,360 25	0 00
105 0000	826552101	SIGMA ALDRICH CORP	10/28/2008	03/03/2009	3,527 35	3,659 20	-131 85	0 00
70 0000	867229106	SUNCOR ENERGY INC	10/28/2008	03/03/2009	1,348 89	1,290 80	58 09	0 00
180 0000	872540109	TJX COS INC NEW	10/28/2008	03/03/2009	3,839 38	4,275 00	-435 62	0 00
260 0000	902973304	US BANCORP	10/28/2008	03/03/2009	3,221 38	7,576 82	-4,355 44	0 00

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NORTHERN TRUST, NA
P O. BOX 803878
CHICAGO, IL 60680

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
230 0000	931142103	WAL MART STORES INC	10/28/2008	03/03/2009	10,867.44	12,169 30	-1,301 86	0 00
220 0000	941848103	WATERS CORP	10/28/2008	03/03/2009	7,396 36	8,340 20	-943 84	0 00
315 0000	G1150G111	ACCENTURE LTD BERMUDA CL A	10/28/2008	03/03/2009	8,712 85	9,049 04	-336.19	0 00
210 0000	G2552X108	#REORG/COVIDEN LTD PLAN OF REORG TO COVIDEN PLC SEC # 2052566 EFF 6/4/09	10/28/2008	03/03/2009	6,386 06	8,503 76	-2,117 70	0 00
50 0000	H8817H100	TRANSOCEAN LTD	10/28/2008	03/03/2009	2,780 98	3,098 50	-317 52	0 00
3586 8000	22544R305	MFO CREDIT SUISSE COMMODITY-RETURN PLUS STRATEGY FD COM CL	04/23/2008	03/04/2009	25,035 87	50,000 00	-24,964 13	0 00
135 0000	001055102	AFLAC INC	10/28/2008	06/23/2009	4,029 30	5,224 50	-1,195.20	0 00
80 0000	002824100	ABBOTT LABORATORIES	10/28/2008	06/23/2009	3,749.90	4,227 68	-477 78	0 00
135 0000	075887109	BECTON DICKINSON & CO	10/28/2008	06/23/2009	9,229 71	8,662 60	567 11	0 00
190 0000	595017104	MICROCHIP TECHNOLOGY INC	10/28/2008	06/23/2009	4,064 00	4,438 40	-374 40	0 00
100 0000	774341101	ROCKWELL COLLINS INC COM	10/28/2008	06/23/2009	4,186 89	3,278 00	908 89	0.00
215 0000	808513105	SCHWAB CHARLES CORP COMMON STOCK NEW	10/28/2008	06/23/2009	3,672 11	3,418 33	253 78	0 00
145 0000	G1150G111	ACCENTURE LTD BERMUDA CL A	10/28/2008	06/23/2009	4,521 27	4,165 43	355 84	0 00
115 0000	G2554F105	COVIDIEN PLC USD0 20	10/28/2008	06/23/2009	4,077 80	4,656 82	-579 02	0 00
110 0000	30161N101	EXELON CORP	10/28/2008	09/16/2009	5,549 36	5,412 00	137 36	0 00
25 0000	336433107	FIRST SOLAR INC COM	10/28/2008	09/16/2009	3,608 66	2,539 00	1,069 66	0 00

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ROSS, CA 94957-1633

NORTHERN TRUST, NA
P O BOX 803878
CHICAGO, IL 60680

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
145 0000	580135101	MC DONALDS CORP COMMON STOCK, NO PAR	10/28/2008	09/16/2009	7,984 94	7,770.55	214 39	0 00
1795 5800	665162541	MFB NORTHERN FDS GLOBAL REAL ESTATE INDEX FD	06/23/2009	09/16/2009	13,000.00	9,642.26	3,357 74	0 00
5119 4500	922031869	MFO VANGUARD FXD INC SECS FD INC INFLATION-PROTECTED SECS FD #119	02/23/2009	09/16/2009	63,788 40	60,000 00	3,788 40	0 00
220 0000	G1151C101	ACCENTURE PLC SHS CL A NEW	10/28/2008	09/16/2009	7,891 20	6,319 96	1,571 24	0 00
Total Short Term Sales					**431,212 35**	**494,480.00**	**-63,267.65**	**0.00**
Long Term 15% Sales								
45 0000	166764100	CHEVRONTEXACO CORP COM	07/07/2004	03/03/2009	2,587 94	2,101 05	486 89	0 00
275 0000	17275R102	CISCO SYS INC	07/22/1997	03/03/2009	3,962 73	2,369 59	1,593 14	0 00
140 0000	235851102	DANAHER CORP	03/19/2003	03/03/2009	6,928 56	4,675 26	2,253 30	0 00
350 0000	30231G102	EXXON MOBIL CORP	12/03/2001	03/03/2009	22,430.88	13,303 50	9,127 38	0 00
250 0000	369604103	GENERAL ELECTRIC CO	01/09/1995	03/03/2009	1,737 49	2,322 92	-585 43	0 00
130 0000	459200101	INTL BUSINESS MACHINES CORP	12/03/2001	03/03/2009	11,403 54	14,748 50	-3,344 96	0 00
120 0000	469814107	JACOBS ENGR GROUP INC	07/07/2004	03/03/2009	3,797 98	2,347 20	1,450 78	0 00
200 0000	478160104	JOHNSON & JOHNSON	VARIOUS	03/03/2009	9,535 95	10,960 30	-1,424 35	0 00
395 0000	594918104	MICROSOFT CORP COM	VARIOUS	03/03/2009	6,272 56	9,486 34	-3,213 78	0 00
2000 1000	665162541	MFB NORTHERN FDS GLOBAL REAL ESTATE INDEX FD	VARIOUS	03/03/2009	7,280 36	26,040 00	-18,759 64	0 00
225 0000	713448108	PEPSICO INC	VARIOUS	03/03/2009	10,829 19	11,013 75	-184 56	0 00

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CHICAGO, IL 60680

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
285 0000	742718109	PROCTER & GAMBLE CO	VARIOUS	03/03/2009	13,315 13	15,469 60	-2,154 47	0 00
115 0000	806857108	SCHLUMBERGER LTD ISIN #AN8068571086	09/25/2006	03/03/2009	4,057 18	6,586 05	-2,528 87	0 00
435 0000	847560109	SPECTRA ENERGY CORP COM STK	09/25/2006	03/03/2009	5,098 17	11,310 77	-6,212 60	0 00
80 0000	913017109	UNITED TECHNOLOGIES CORP	09/28/2007	03/03/2009	3,070 38	6,414 88	-3,344 50	0 00
265 0000	92343V104	VERIZON COMMUNICATIONS	VARIOUS	03/03/2009	7,226 51	8,378 89	-1,152 38	0 00
280 0000	949746101	WELLS FARGO & CO NEW	12/03/2001	03/03/2009	2,953 98	6,010 20	-3,056 22	0 00
25000 0000	91159HGK0	U S BANCORP MEDIUM TERM NTS-BOOK ENTRY TRANCHE # TR 00154 5 3% DUE 04-28-2009	05/02/2006	04/28/2009	25,000 00	24,960 00	40.00	0 00
80 0000	166764100	CHEVRONTEXACO CORP COM	07/07/2004	06/23/2009	5,276 66	3,735.20	1,541 46	0 00
35 0000	459200101	INTL BUSINESS MACHINES CORP	12/03/2001	06/23/2009	3,656 01	3,970 75	-314 74	0 00
65 0000	478160104	JOHNSON & JOHNSON	VARIOUS	06/23/2009	3,576 86	3,534 15	42 71	0 00
60 0000	713448108	PEPSICO INC	12/03/2001	06/23/2009	3,177 52	2,927 40	250 12	0 00
55 0000	742718109	PROCTER & GAMBLE CO	12/28/2001	06/23/2009	2,781 28	2,168 59	612.69	0 00
200 0000	78463V107	MFC SPDR GOLD TR GOLD SHS		06/30/2009	5 81		5 81	0 00
200 0000	78463V107	MFC SPDR GOLD TR GOLD SHS		07/31/2009	5 83		5 83	0 00
75000 0000	931142BE2	WAL MART STORES INC NT DTD 08/10/99 6 875% 08/10/2009	08/26/1999	08/10/2009	75,000 00	75,807 00	-807 00	0.00
200 0000	78463V107	MFC SPDR GOLD TR GOLD SHS		08/31/2009	6 12		6 12	0 00
50000 0000	362311AF9	GTE CALIF INC DEB SER E DTD 09/01/1997 6 7% DUE 09-01-2009 REG	11/12/1999	09/01/2009	50,000 00	49,366 50	633 50	0 00

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CHICAGO, IL 60680

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
115 0000	742718109	PROCTER & GAMBLE CO	12/28/2001	09/16/2009	6,322 54	4,534 32	1,788 22	0 00
200 0000	78463V107	MFC SPDR GOLD TR GOLD SHS		09/30/2009	6 77		6 77	0 00
200 0000	78463V107	MFC SPDR GOLD TR GOLD SHS		10/31/2009	6 46		6 46	0 00
200 0000	78463V107	MFC SPDR GOLD TR GOLD SHS		11/30/2009	6 93		6 93	0 00
200 0000	78463V107	MFC SPDR GOLD TR GOLD SHS		12/31/2009	6 98		6 98	0 00
Total Long Term 15% Sales					**297,324.30**	**324,542.71**	**-27,218 41**	**0.00**

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FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
CHECKING ACCOUNT	17.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	17.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
CORPORATE BONDS	16,994.	0.	16,994.
MONEY MARKET	726.	0.	726.
MUTUAL FUNDS	2,646.	2,646.	0.
STOCKS / MUTUAL FUNDS	47,082.	0.	47,082.
TOTAL TO FM 990-PF, PART I, LN 4	67,448.	2,646.	64,802.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ECKHOFF ACCOUNTANCY, ACCOUNTING & PREPARATION OF FORM 990-PF	1,700.	425.		1,375.
TO FORM 990-PF, PG 1, LN 16B	1,700.	425.		1,375.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAXES	412.	0.		0.
FOREIGN TAXES	616.	616.		0.
TO FORM 990-PF, PG 1, LN 18	1,028.	616.		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
OFFICE EXPENSE	1,338.	0.		1,338.
INVESTMENT TRUSTEE FEES	15,252.	15,252.		0.
FILING FEES	10.	0.		0.
TO FORM 990-PF, PG 1, LN 23	16,600.	15,252.		1,338.

FORM 990-PF	CORPORATE STOCK	STATEMENT 6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
INVESTMENTS HELD AT NORTHERN TRUST	901,036.	1,160,419.
TOTAL TO FORM 990-PF, PART II, LINE 10B	901,036.	1,160,419.

FORM 990-PF	CORPORATE BONDS	STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
INVESTMENTS HELD AT NORTHERN TRUST	790,437.	814,907.
TOTAL TO FORM 990-PF, PART II, LINE 10C	790,437.	814,907.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT 8

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
ORGANIZATION COSTS	200.	200.	0.
TOTAL TO FM 990-PF, PART II, LN 14	200.	200.	0.

FORM 990-PF GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR STATEMENT 9

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
BAY AREA CRISIS NURSERY 1506 MENDOCINO DRIVE CONCORD, CA 94521	NONE MEDICAL NEEDS	EXEMPT	6,000.
BAYCAT 2415 THIRD STREET, SUITE 230 SAN FRANCISCO, CA 94107	NONE COMMUNITY SERVICE	EXEMPT	5,500.
BIZWORLD FOUNDATION 44 DE HARO STREET #203 SAN FRANCISCO, CA 94107	NONE EDUCATION	EXEMPT	5,500.
CATHOLIC YOUTH ORGANIZATION 4900 REDWOOD HWY SAN RAFAEL, CA 94901	NONE COMMUNITY SERVICE	EXEMPT	5,000.
COLORADO SYMPHONY 999 18TH STREET DENVER, CO 80202	NONE COMMUNITY SERVICE	EXEMPT	2,000.
FRIENDS OF MEALS ON WHEELS 930 TAMALPAIS AVENUE SAN RAFAEL, CA 94901	NONE HUMAN NEEDS	EXEMPT	2,250.
JUVENILE DIABETES FOUNDATION 121 SECOND STREET, 2ND FLOOR SAN FRANCISCO, CA 94103	NONE MEDICAL NEEDS	EXEMPT	1,000.
LA CASA DE LAS MADRES 1850 MISSION STREET, STE B SAN FRANCISCO, CA 94103	NONE COMMUNITY SERVICE	EXEMPT	3,750.

LAMORINDA ADULT RESPITE CENTER 433 MORAGA WAY ORINDA, CA 94563	NONE COMMUNITY SERVICE	EXEMPT	2,600.
MARIN CATHOLIC HIGH SCHOOL 675 SIR FRANCIS DRAKE BLVD. KENTFIELD, CA 94904	NONE EDUCATION	EXEMPT	32,000.
MARIN HISTORY MUSEUM 1125 B STREET SAN RAFAEL, CA 94901	NONE EDUCATION	EXEMPT	4,000.
MILWAUKEE SYMPHONY, ART IN COMMUNITY EDUCATION 330 EAST KILBOURN #900 MILWAUKEE, WI 53202	NONE FUNDING FOR THE ARTS	EXEMPT	6,000.
NAZARETH HOUSE 245 NOVA ALBION WAY SAN RAFAEL, CA 94903	NONE COMMUNITY SERVICE	EXEMPT	4,500.
OREGON SHAKESPEARE FESTIVAL 5000 VALLEY VIEW RD RICHMOND, CA 94803	NONE FUNDING FOR THE ARTS	EXEMPT	6,000.
PERFORMING STARS OF MARIN 271 DRAKE AVE MARIN CITY, CA 94965	NONE COMMUNITY SERVICE	EXEMPT	3,750.
PHILANTHROPIC VENTURES FOUNDATION 122 PRESERVATION PKY OAKLAND, CA 94605	NONE COMMUNITY SERVICE	EXEMPT	3,750.
SAINT RAPHAEL SCHOOL 1100 FIFTH AVENUE SAN RAFAEL, CA 94901	NONE EDUCATION	EXEMPT	6,000.
SF CAMERAWORK 1246 FOLSOM STREET SAN FRANCISCO, CA 941033817	NONE COMMUNITY SERVICE	EXEMPT	5,000.

SISTER OF HOLY NAMES JESUS AND MARY P.O. BOX 907 LOS GATOS, CA 95031	NONE COMMUNITY SERVICE	EXEMPT	1,500.
YMCA SAN FRANCISCO 631 HOWARD STREET #500 SAN FRANCISCO, CA 94105	NONE COMMUNITY SERVICE	EXEMPT	4,500.
YOUTH SPEAKS 2169 FOLSOLM ST. SAN FRANCISCO, CA 94110	NONE COMMUNITY SERVICE	EXEMPT	5,500.
YOUTH UPRISING 8711 MACARTHUR BLVD OAKLAND, CA 94605	NONE COMMUNITY SERVICE	EXEMPT	5,500.
TOTAL TO FORM 990-PF, PART XV, LINE 3A			121,600.