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: Eugenie & Joseph Jones Family Foundation

A Employer identification number: 72-0507534

Number and street (or P O box number if mail is not delivered to street address): 835 Union Street — Room/suite: 333

B Telephone number: (504)584-1540

City or town, state, and ZIP code: New Orleans, LA 70112

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) ▶$ 16,194,792.

J Accounting method: [X] Cash ☐ Accrual ☐ Other (specify) (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))

	Line	Description	(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			N/A	
	2	Check ▶ [X] if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	285,683.	285,683.		Statement 1
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	<78,984.>			
	b	Gross sales price for all assets on line 6a 2,474,222.				
	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	206,699.	285,683.		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0.	0.		0.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees				
	b	Accounting fees				
	c	Other professional fees Stmt 2	77,282.	71,318.		5,964.
	17	Interest				
	18	Taxes Stmt 3	<462.>	5.		0.
	19	Depreciation and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses Stmt 4	20,439.	2,972.		17,467.
	24	**Total operating and administrative expenses.** Add lines 13 through 23	97,259.	74,295.		23,431.
	25	Contributions, gifts, grants paid	1,104,982.			1,104,982.
	26	**Total expenses and disbursements.** Add lines 24 and 25	1,202,241.	74,295.		1,128,413.
	27	Subtract line 26 from line 12				
	a	Excess of revenue over expenses and disbursements	<995,542.>			
	b	**Net investment income** (if negative, enter -0-)		211,388.		
	c	**Adjusted net income** (if negative, enter -0-)			N/A	

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923501 02-02-10 LHA **For Privacy Act and Paperwork Reduction Act Notice, see the instructions.** Form **990-PF** (2009)

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	11,470.	27,259.	27,259.
	2 Savings and temporary cash investments	3,416,677.	1,622,866.	1,622,866.
	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			
	b Investments - corporate stock Stmt 5	9,495,169.	10,397,683.	11,480,056.
	c Investments - corporate bonds Stmt 6	2,952,570.	2,833,636.	3,064,611.
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment basis ▶ 5,633.			
	Less accumulated depreciation Stmt 7 ▶ 5,633.			
	15 Other assets (describe ▶ Statement 8)	26,032.	24,337.	0.
	16 Total assets (to be completed by all filers)	15,901,918.	14,905,781.	16,194,792.
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 ▶ Statement 9)	3,944.	3,349.	
	23 Total liabilities (add lines 17 through 22)	3,944.	3,349.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg , and equipment fund	3,963,976.	3,963,976.	
	29 Retained earnings, accumulated income, endowment, or other funds	11,933,998.	10,938,456.	
	30 Total net assets or fund balances	15,897,974.	14,902,432.	
	31 Total liabilities and net assets/fund balances	15,901,918.	14,905,781.	

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	15,897,974.
2	Enter amount from Part I, line 27a	2	<995,542.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	14,902,432.
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	14,902,432.

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	2,474,222.		2,553,206.	<78,984.>

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				
b				
c				
d				
e				<78,984.>

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 <78,984.>

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	1,126,065.	17,721,423.	.063543
2007	1,020,605.	20,918,570.	.048789
2006	1,043,058.	21,026,963.	.049606
2005	957,006.	19,500,134.	.049077
2004	753,051.	17,869,173.	.042142

2	**Total** of line 1, column (d)	2	.253157
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	.050631
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	14,429,262.
5	Multiply line 4 by line 3	5	730,568.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,114.
7	Add lines 5 and 6	7	732,682.
8	Enter qualifying distributions from Part XII, line 4	8	1,128,413.

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 ▶ [X] and enter 1% of Part I, line 27b		1	2,114.
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	2,114.
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	2,114.
6	Credits/Payments			
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a 25,019.		
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	25,019.
8	Enter any **penalty** for underpayment of estimated tax Check here [X] 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	22,905.
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ 5,000.	Refunded ▶	11	17,905.

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)? *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.*	1b		X
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) ▶ LA			
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? N/A	13		

Website address ▶ N/A

14 The books are in care of ▶ Gulfside, Inc. Telephone no ▶ (504) 581-2424

Located at ▶ 835 Union Street, Suite 333, New Orleans, LA ZIP+4 ▶ 70112

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? ☐ 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)?	1b		X
	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 [X] 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 [X] No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes [X] 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 [X] 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 [X] 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 [X] 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 [X] 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
See Statement 10		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

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
St. Denis J. Villere & Company - 601 Poydras Street, Suite 1808, New Orleans, LA 70130	portfolio investment manager	71,318.

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.

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	13,240,919.
b	Average of monthly cash balances		1b	1,408,078.
c	Fair market value of all other assets		1c	
d	**Total** (add lines 1a, b, and c)		1d	14,648,997.
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	14,648,997.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	219,735.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4		5	14,429,262.
6	**Minimum investment return.** Enter 5% of line 5		6	721,463.

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	721,463.
2a	Tax on investment income for 2009 from Part VI, line 5	2a 2,114.		
b	Income tax for 2009 (This does not include the tax from Part VI)	2b		
c	Add lines 2a and 2b		2c	2,114.
3	Distributable amount before adjustments Subtract line 2c from line 1		3	719,349.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	719,349.
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	719,349.

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	1,128,413.
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	1,128,413.
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	2,114.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	1,126,299.

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				719,349.
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 47,676.				
c From 2006 17,690.				
d From 2007 10,034.				
e From 2008 243,384.				
f Total of lines 3a through e	318,784.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ $ 1,128,413.				
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				719,349.
e Remaining amount distributed out of corpus	409,064.			
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	727,848.			
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	727,848.			
10 Analysis of line 9				
a Excess from 2005 47,676.				
b Excess from 2006 17,690.				
c Excess from 2007 10,034.				
d Excess from 2008 243,384.				
e Excess from 2009 409,064.				

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 ▶ ☐ 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·

Maryln Burrell c/o Jones Family Foundation, (504) 584-1545
835 Union Street, Suite 333, New Orleans, LA 70112

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

(See attached application form)

c Any submission deadlines

None

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

None

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 Attached Schedule	None	Tax Exempt	To fulfill exempt purpose	1,104,982.
Total			▶ 3a	1,104,982.
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					
4 Dividends and interest from securities			14	285,683.	
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	<78,984.>	
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.		206,699.	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 206,699.

(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)

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

Susan J. Gundlach 6/8/10 PRESIDENT

Signature of officer or trustee | Date | Title

Paid Preparer's Use Only

Preparer's signature: [signature] | Date: 6/03/10 | Check if self-employed ☐ | Preparer's identifying number

Firm's name (or yours if self-employed), address, and ZIP code: Gulfside, Inc.
835 Union Street, Suite 333
New Orleans, LA 70112

EIN

Phone no (504) 584-1540

Form 990-PF (2009)

923622
02-02-10

Form 990-PF Dividends and Interest from Securities Statement 1

Source	Gross Amount	Capital Gains Dividends	Column (A) Amount
Schwab Institutional	138,262.	0.	138,262.
Schwab Institutional	159,594.	0.	159,594.
Schwab Institutional	<12,173.>	0.	<12,173.>
Total to Fm 990-PF, Part I, ln 4	285,683.	0.	285,683.

Form 990-PF Other Professional Fees Statement 2

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Consulting Fee	5,964.	0.		5,964.
Investment Counselling Fee	71,318.	71,318.		0.
To Form 990-PF, Pg 1, ln 16c	77,282.	71,318.		5,964.

Form 990-PF Taxes Statement 3

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
LA Annual Reporting Fee	5.	5.		0.
Excise Taxes	<467.>	0.		0.
To Form 990-PF, Pg 1, ln 18	<462.>	5.		0.

Form 990-PF Other Expenses Statement 4

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Computer Supplies	2,014.	0.		2,014.
Bank Charges / Wire transfer fees	240.	0.		240.
Salary Expense - payroll master - reported under 72-0145535	11,895.	2,379.		9,516.
Benefits Expense	2,965.	593.		2,372.
Parking Expenses	2,120.	0.		2,120.
Corporate Board Meeting	1,205.	0.		1,205.
To Form 990-PF, Pg 1, ln 23	20,439.	2,972.		17,467.

Form 990-PF Corporate Stock Statement 5

Description	Book Value	Fair Market Value
Investments - Stocks	10,397,683.	11,480,056.
Total to Form 990-PF, Part II, line 10b	10,397,683.	11,480,056.

Form 990-PF Corporate Bonds Statement 6

Description	Book Value	Fair Market Value
Investments - Bonds	2,833,636.	3,064,611.
Total to Form 990-PF, Part II, line 10c	2,833,636.	3,064,611.

Form 990-PF Depreciation of Assets Not Held for Investment Statement 7

Description	Cost or Other Basis	Accumulated Depreciation	Book Value
Computer Equipment	3,534.	3,534.	0.
Computer Equipment	2,099.	2,099.	0.
Total To Fm 990-PF, Part II, ln 14	5,633.	5,633.	0.

Form 990-PF Other Assets Statement 8

Description	Beginning of Yr Book Value	End of Year Book Value	Fair Market Value
Prepaid Excise Tax	26,714.	25,019.	0.
Other Partnership Investment	<682.>	<682.>	0.
To Form 990-PF, Part II, line 15	26,032.	24,337.	0.

Form 990-PF Other Liabilities Statement 9

Description	BOY Amount	EOY Amount
Accrued payroll expense	3,944.	3,349.
Total to Form 990-PF, Part II, line 22	3,944.	3,349.

Form 990-PF Part VIII - List of Officers, Directors Trustees and Foundation Managers Statement 10

Name and Address	Title and Avrg Hrs/Wk	Compen-sation	Employee Ben Plan Contrib	Expense Account
Susan J. Gundlach 835 Union Street, Suite 333 New Orleans, LA 70112	President 5.00	0.	0.	0.
Eugenie J. Huger 835 Union Street, Suite 333 New Orleans, LA 70112	Vice Pres 0.00	0.	0.	0.
Elaine F. Jones 835 Union Street, Suite 333 New Orleans, LA 70112	Sec / Treas 5.00	0.	0.	0.
Caroline H. Boone 835 Union Street, Suite 333 New Orleans, LA 70112	Trustee 5.00	0.	0.	0.
James M. Huger 835 Union Street, Suite 333 New Orleans, LA 70112	Trustee 5.00	0.	0.	0.
Melissa Steiner 835 Union Street, Suite 333 New Orleans, LA 70112	Trustee 5.00	0.	0.	0.
Susan L. Stall 835 Union Street, Suite 333 New Orleans, LA 70112	Trustee 5.00	0.	0.	0.
Totals included on 990-PF, Page 6, Part VIII		0.	0.	0.

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	3,000 sh - AAR Corporation	P	09/26/08	08/06/09
b	45,100 sh - Vantage Drilling	P	09/01/09	09/17/09
c	344,900 sh - Vantage Drilling	P	09/01/09	10/20/09
d	3,000 sh - Abbott Labs	P	07/30/07	02/17/09
e	5,000 sh - O'Reilly Automotive	P	06/09/06	02/23/09
f	5,500 sh - Epiq	P	02/05/03	03/12/09
g	$140,000 - Colonial Bank Notes	P	03/16/06	03/30/09
h	12,000 sh - AAR Corporation	P	10/15/07	08/06/09
i	9,000 sh - O'Reilly Automotive	P	06/09/06	08/07/09
j	$210,000 - Colonial Bank Notes	P	03/16/06	08/14/09
k	7,000 sh - Euronet Worldwide	P	07/28/08	09/23/09
l	12,800 sh - Euronet Worldwide	P	07/28/08	10/19/09
m	Litigation Settlement	P	Various	04/21/09
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	58,595.		50,850.	7,745.
b	78,528.		69,908.	8,620.
c	670,029.		534,617.	135,412.
d	300,000.		292,430.	7,570.
e	161,927.		159,084.	2,843.
f	88,131.		65,361.	22,770.
g	22,025.		144,322.	<122,297.>
h	234,382.		385,390.	<151,008.>
i	353,218.		286,352.	66,866.
j	9,950.		216,483.	<206,533.>
k	178,812.		125,427.	53,385.
l	318,501.		222,982.	95,519.
m	124.			124.
n				
o				

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) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a				7,745.
b				8,620.
c				135,412.
d				7,570.
e				2,843.
f				22,770.
g				<122,297.>
h				<151,008.>
i				66,866.
j				<206,533.>
k				53,385.
l				95,519.
m				124.
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	<78,984.>
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

923591
04-24-09

Form 990-PF Page 1 990-PF

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	* Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
1	Computer Equipment	051898	200DB	5.00	17	3,534.			3,534.	3,534.		0.
2	Computer Equipment	050101	200DB	5.00	17	2,099.			2,099.	2,099.		0.
	* Total 990-PF Pg 1 Depr					5,633.		0.	5,633.	5,633.	0.	0.

928102
06-24-09

(D) - Asset disposed

* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction

Eugenie & Joseph Jones Family Foundation
Year 2009
Fed ID #72-0507534
$1,104,982

	Charity	Total
1	American Cancer Society- Relay For Life	$5,000
2	American Heart Association- Go Red For Women 2009	$5,000
3	Archbishop's Community Appeal	$1,000
4	Art in Bloom 2009	$10,000
5	Audubon Charter School-Pre-K Program	$10,000
6	Audubon Institute / Whitney Zoo-To-Do 2009	$10,000
7	Audubon Institute / Zoo-To-Do for Kids 2009	$5,000
8	Big Brothers- Big Sisters	$5,000
9	Bishop Wilmer Memorial Fund	$200
10	Bridge House- Expansion Fund	$10,000
11	Bureau of Gov. Research	$1,000
12	Bureau of Gov. Research - Core Funding 2007-2009 - 3 year pledge	$30,000
13	Casa Argentina- Tango Night	$2,500
14	Center for Development and Learning- Contribution	$5,000
15	Center for Development and Learning	$15,000
16	Chartwell Center	$10,000
17	Chartwell Center	$10,000
18	Children's Hospital - Sugarplum Ball	$5,000
19	Community Center of St. Bernard- Mustard Seed Equipment	$5,000
20	Crimestoppers	$10,000
21	Edible Schoolyard	$5,000
22	Family Service of Greater N.O.- Children Sexual Abuse Prevention Program	$5,000
23	Friends of City Park- Carousel Endowment	$15,000
24	Friends of The Stables- Audubon	$80,000
25	Greater N O Educational Television Foundation- WYES-TV Channel 12	$14,432
26	Greater New Orleans Youth Orchestra	$1,000
27	Hermann Grima/Gallier Historic Houses - Endowment - 5 year pledge	$20,000
28	Hollins College	$3,000
29	Idea Village- Operating Funds	$10,000
30	Idea Village	$20,000
31	Isidore Newman School	$10,000
32	Isidore Newman School- Arts Program- 3year pledge	$100,000
33	Jefferson Educational Foundation	$10,000
34	Jesse Brent & Merrick Jones Golf Tournament	$5,000
35	Just The Right Attitude- "Feeding The Multitude"	$10,000
36	Kingsley House, Inc.	$1,000
37	KIPP- New Orleans Schools	$15,000

Eugenie & Joseph Jones Family Foundation
Year 2009
Fed ID #72-0507534
$1,104,982

	Charity	Total
38	Lafayette Academy Charter School	$100,000
39	LA Philharmonic Orchestra	$1,000
40	LA / SPCA	$2,000
41	LCRC (Saks Fifth Avenue - Key to the Cure)	$5,000
42	Lighthouse for the Blind	$10,000
43	Louisiana Troopers Charities, Inc.	$6,000
44	Louise S. McGehee	$10,000
45	LOUISE S. McGehee -3 year pledge- First Street Project	$33,333
46	Legacy Donor Foundation	$5,000
47	LSUHSC- Department of Psychiatry	$10,000
48	March of Dimes- Signature Chefs Gala	$10,000
49	Metairie Park Country Day School	$10,000
50	Midway Museum	$15,000
51	Miller-McCoy Middle & High School- Operating Budget	$6,500
52	Miller-McCoy Middle & High School	$10,000
53	Newcomb Art Gallery	$5,000
54	New Orleans Botanical Gardens	$1,500
55	New Orleans Jazz Orchestra (NOJO)	$30,000
56	New Orleans Museum of Art (NOMA)	$5,000
57	New Orleans Opera Association (Program with Lafayette School)	$5,000
58	New Orleans Opera Association	$10,000
59	New Orleans Outreach	$1,000
60	Newcomb Art Gallery	$2,000
61	Parkway Partners Program	$1,000
62	Pennies for Bread & Abbey	$1,000
63	Planned Parenthood	$10,000
64	Princeton University	$1,000
65	Prospect. 1 New Orleans	$15,000
66	Police and Justice Foundation- New Orleans	$10,000
67	Rebuilding Together New Orleans	$15,000
68	St. Bernard Project	$10,000
69	St. George's Episcopal School	$10,000
70	St. Michael Special School - Blue Rose Ball	$600
71	St. Stephen's Episcopal Church	$1,000
72	Second Harvesters-Food Budget	$1,267
73	Start the Adventure in reading Inc.	$10,000
74	Second Harvesters	$1,000

Eugenie & Joseph Jones Family Foundation
Year 2009
Fed ID #72-0507534
$1,104,982

	Charity	Total
75	Teach for America	$10,000
76	Teach for America (Sponsor a Teacher)	$5,000
77	Tennessee Williams N.O. Literary Festival	$5,000
78	Touro Infirmary Foundation- Heebe Family Fund	$6,650
79	Touro Infirmary Foundation- Cancer Center	$50,000
80	Trinity Educational Enrichment Program (TEEP)	$3,000
81	Trinity Episcopal Church	$30,000
82	Trinity Episcopal School	$10,000
83	Tulane University	$100,000
84	United Way	$25,000
85	Washington & Lee University	$1,000
	TOTAL CONTRIBUTED TO DATE	$1,104,982

Eugenie & Joseph Jones Family Foundation
Balance Sheet - Corporate Stock and Corporate Bonds
January 1 - December 31, 2009

Form 990 - PF
Line 10 (b)

Corporate Stock	Book Value	Fair Market Value
69,400 sh - 3 D Systems Corp	$743,627	$784,220
30,000 sh - AAR Corp	$508,502	$689,400
12,400 sh - Abbott Laboratories	$538,406	$669,476
67,000 sh - American Vanguard	$698,817	$556,100
850 sh - Bank of America	$595,738	$748,000
24,000 sh - Cleco	$518,713	$655,920
12,000 sh - Cullen Frost Bankers	$599,904	$600,000
50,000 sh - Epiq Systems	$558,548	$699,500
25,000 sh - Euronet Worldwide	$435,511	$548,750
32,000 sh - Gulf Island Fabrication	$997,374	$672,960
84,000 sh - ION Geophysical	$661,790	$497,280
75,000 sh - Luminex	$581,691	$1,119,750
9,500 sh - McDonald's	$489,295	$593,180
16,000 sh - O'Reilly Automotive	$509,069	$609,920
40,000 sh - PHI Inc.	$952,847	$828,000
20,000 sh - Quest Diagnostics	$1,007,851	$1,207,600
	$10,397,683	$11,480,056

Eugenie & Joseph Jones Family Foundation
Balance Sheet - Corporate Stock and Corporate Bonds
January 1 - December 31, 2009

Form 990 - PF
Line 10 c

Corporate Bonds

	Book Value	Fair Market Value
$300,000 Bank Amer Corp	$286,950	$307,067
$550,000 General Electric	$534,301	$576,173
$500,000 JP Morgan	$492,525	$527,724
$300,000 Marshall & ILSL	$294,645	$293,417
$500,000 Pepsico	$499,790	$539,613
$300,000 Wells Fargo	$282,900	$304,409
$500,000 Whitney 5.875% Note	$442,525	$516,208
Total	$2,833,636	$3,064,611

Eugenie & Joseph Jones Family Foundation

Application Form

The Eugenie & Joseph Jones Family Foundation's primary areas of interest include education, community development, health and human services, and arts and cultural programs. Primary consideration will be given to those organizations whose operations are conducted in the Greater New Orleans area. Grants are made only to non-profit, tax-exempt organizations with 501(c)(3) status. No grants are made to individuals for any purpose.

Proposals are accepted and reviewed throughout the year. Decisions regarding grants will be made at regularly scheduled meetings of the trustees.

GENERAL INSTRUCTIONS

! Please type and single space all proposals.

! Please answer all of the questions in the order listed.

! Please submit only one copy.

! Please do not send videotapes.

! Please do not include any materials other than requested.

Proposals should be sent to:

Mrs. Susan Jones Gundlach – President
Eugenie & Joseph Jones Family Foundation
835 Union Street
New Orleans, LA 70112
(504) 584-1545
or
Ms. Maryln C. Burrell – Executive Administrator
Eugenie & Joseph Jones Family Foundation
835 Union Street
New Orleans, LA 70112
(504) 584-1545

Eugenie & Joseph Jones Family Foundation

Grant Proposal Guidelines

I. Proposal Narrative

a. Background – Describe the work of your agency addressing each of the following topics:
   1. Brief description – History and mission
   2. Current program, accomplishments and achievements
   3. Organizational Structure – Board, Staff and volunteers
   4. Organizational Relationship – Providing similar services of other agencies (explain differences and similarities)

b. Funding Request – Please describe the program for which you seek funding.
   1. General Operating Support – Describe how the grant would be used.
   2. Specific Project/Program – Describe in detail as follows:
      - Statement of primary purpose and issue that you are seeking to address
      - Names and qualifications of individuals who direct the project
      - Timeline of Project
      - How Project contributes to overall mission of your organization and the benefits to the community
      - Collaboration/Interaction with other groups

c. Evaluation – Please explain how you will measure the effectiveness of your activities.
   1. Criteria for successful program
   2. Expected achievements by end of funding period
   3. Future plans for funding

II. ATTACHMENTS – Please label all attachments

a. Financial Information – Overall Organization
    1. Current and prior year operating budget including expenses and revenue; list sources of revenue received and those pending includingin-kind.
    2. Annual Financial Statement (most recent, audited if available, if not enclose most recent IRS Form 990)
b. Financial Information – Project/Program
    1. Project budget
    2. Key staff positions and % of time spent on project
    3. Names and amounts requested from other foundations, corporation and other funding sources for this particular proposal
    4. Specific uses of requested grant
    5. In-kind support
c. Other supporting materials
    1. List of Board of Directors and their principal affiliations
    2. One-paragraph resume of key organizational staff including key project staff
    3. Copy of IRS determination letter indicating 501 (c)3 and 509(a) tax exempt status
    4. Recent annual report
    5. Agency affiliation with federated funds or public agencies

III. Proposal Summary –**Attached proposal summary sheet must be completed.**

Eugenie & Joseph Jones Family Foundation

Grant Proposal Summary Sheet

Name of Organization		Date:
Address of Organization		Telephone
Names and Titles of Individuals Submitting Request		United Way/ACA/Govt'Support
Amount Requested $	Total This Project/Program $	Total Organizational Annual Budget $
Brief Title (One Sentence)		Dates of Project/Program

Please summarize in a short paragraph the purpose of your agency Briefly explain why your agency is requesting this grant, what outcome you hope to achieve, and how you will spend the funds if a grant is made.

Others being solicited for this project	Amount requested	Amount received
Subject focus (Program area)	Population Served	Type of Support Requested (i.e. Operating, Capital, Start-up, etc.)

Signature of Board Chairman

Signature of Executive Officer

Print Name

Print Name

Form **8868**
(Rev. April 2009)
Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ File a separate application for each return

OMB No. 1545-1709

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

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Part I **Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ▶ [ ]

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

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

Type or print	Name of Exempt Organization	Employer identification number
	Eugenie & Joseph Jones Family Foundation	72-0507534
File by the due date for filing your return See instructions	Number, street, and room or suite no. If a P.O. box, see instructions. 835 Union Street, No. 333	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. New Orleans, LA 70112	

INTERNAL REVENUE SERVICE W&I - FIELD ASSISTANCE NEW ORLEANS 70112 MAY 12 2010 RECEIVED 35307

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

[ ] Form 990	[ ] Form 990-T (corporation)	[ ] Form 4720
[ ] Form 990-BL	[ ] Form 990-T (sec. 401(a) or 408(a) trust)	[ ] Form 5227
[ ] Form 990-EZ	[ ] Form 990-T (trust other than above)	[ ] Form 6069
[X] Form 990-PF	[ ] Form 1041-A	[ ] Form 8870

- The books are in the care of ▶ Gulfside, Inc.
835 Union Street, Suite 333 - New Orleans, LA 70112

Telephone No. ▶ (504) 581-2424 FAX No ▶ (504) 584-1563

- If the organization does not have an office or place of business in the United States, check this box ▶ [ ]
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______. If this is for the whole group, check this box ▶ [ ] If it is for part of the group, check this box ▶ [ ] and attach a list with the names and EINs of all members the extension will cover

1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until August 15, 2010, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
▶ [X] calendar year 2009 or
▶ [ ] tax year beginning ______, and ending ______

2 If this tax year is for less than 12 months, check reason: [ ] Initial return [ ] Final return [ ] Change in accounting period

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	$ 2,114.
b	If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit	3b	$ 25,019.
c	**Balance Due.** Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	$ 0.

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