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Form **990-PF**

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

OMB No 1545-0052

2009

Department of the Treasury Internal Revenue Service

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

For cal-	enda	r year 2009, or t	ax year beginning	, 2009	, and ending		
G Che	eck a	II that apply.		tial Return of a former po	- <u>- —</u>		al return
		Al	Amended return	Address o		Employer identification nul	
Use th		Name of foundation		_ , ,	A	• •	mber
IRS lat Otherw		Number and street (Jones Alexander or PO box number if mail is no	Foundation	Room/suite R	74-6039211	
prin					Room/suite B	Telephone number (see the	•
or typ	e i	c/o G. ARI	ECCHI 130 CROFT		710	(210) 223-30	
See Spe Instructi	CITIC	City or town			ZIP code C	If exemption application is	· -
		SAN ANTONI				1 Foreign organizations, chec	<u> </u>
н С		type of organiza		1(c)(3) exempt private for		2 Foreign organizations meet here and attach computation	ting the 85% test, check
			nonexempt charitable t		private foundation	If private foundation status	L-
		rket value of all asse		counting method. X C	ash Accrual	under section 507(b)(1)(A)	
		art II, column (c), lın		Other (specify)	F	If the foundation is in a 60	-month termination
▶ \$, column (d) must be on	cash basis)	under section 507(b)(1)(B)	, check here
Part I		nalysis of R		(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements
	E	xpenses (The	total of amounts in	expenses per books	income	income	for charitable
	C	oiumns (b), (c), arily equal the a	and (d) may not neces- mounts in column (a)				purposes (cash basis only)
	(see the instruction	ons))				(cash basis only)
	1		, grants, etc, received (att sch)	5,000.	ş w w		
	2	Ck ► if the	foundn is not req to att Sch B	N # 1, #6 %		s	, , ;
	3	Interest on sav	vings and temporary				
		cash investme	ents	F 00:			<u>**</u> ' * .* ** ** *
	4		erest from securities	5,984.	5,984.		* •
		a Gross rents b Net rental income					,
_	_	or (łoss)		*		4	A 1 4 3 5 1 1
R E		a Net gain/(loss) fror b Gross sales price f	n sale of assets not on line 10			* * * * * * * * * * * * * * * * * * *	
v	_	assets on line 6a		***			
Ë	7		come (from Part IV, line 2)				
N U	8			· · · · · · · · · · · · · · · · · · ·			** * * * * * * * * * * * * * * * * * * *
Ĕ	10	Income modifi	cations	,		36	* * * * *
	10	a Gross sales less returns and allowances		,		· · · · *	* * * *
		Lilace Co ctool— —		* * * *		*	
		goods sold - (Gross profit/(loss		* * *		 	
	11	Offier income	(attach schedule)				图 . 第
	'''		1 6 2010				
	12		es 1 through 11 2	10,984.	5,984.		9 - 5 %
	13	Contractionsofie	thears directors trustees atc	20/3010	0,0011		
	14	Other employee	Tarries and wages				
	15	Pension plans	, employee benefits	, , , , , , , , , , , , , , , , , , , ,			
А	16	a Legal fees (attach					
		,	attach sch) L-16b Stmt	1,000.	500.		500
S N		c Other prof fees (a		-,			
U I	17		•		· · · · -		
PS	18		(see instr.) EXCISE TAX	55.		1	
RRA	19		•				M. Orton Rock
N V		sch) and deple					4960 P. T. 1 115 W
N V	20						ļ
	21		ences, and meetings				
A E X P	22						
D P	23	Other expense	es (attach schedule)				
E N S		T-4-!'					
S E S	24	expenses. Add	g and administrative d lines 13 through 23	1,055.	500.		500
•	25				1 m 14 / 1 + 1 4 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	The Land Control of the	12,250
	I		es and disbursements.		W 32 W		
	20	Add lines 24 a	and 25	13,305.	500.		12,750
	27		26 from line 12:	1.7122 BiVISE	CONT. P. WAR.	2 6 8 8 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6	数 转级定案[1] 鐵
			enue over expenses	0 00-			
		and disburser		-2,321.	THE STATE OF THE S		
			come (if negative, enter -0-)	** ** X***	5,484.	是他们的4~ 6 000000000000000000000000000000000000	TATION OF THE PARTY OF THE PART
			me (if negative, enter -0-)	t Notice, see the instru	\$ 1 TY 2 1 TY 2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1]	Form 990-PE (2006
						A0201 02/02/10	

Form	990-F	PF (2009) Kathleen Jones Alexander Foundat	ion	74-603	39211 Page 2
Do		Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End o	f year
Part		Balance Sheets column should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash — non-interest-bearing			
	2	Savings and temporary cash investments	3,985.	1,619.	1,619.
	3	Accounts receivable			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable	10 March 1994		
		Less allowance for doubtful accounts ▶		<u> </u>	,
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7	Other notes and loans receivable (attach sch)	<u> </u>	\$ 14 C	1 1 24 64
A		Less allowance for doubtful accounts			
A S E T	8	Inventories for sale or use			
Ē	9	Prepaid expenses and deferred charges		10.	10.
Ś		Investments – U.S. and state government obligations (attach schedule)			
	b	investments — corporate stock (attach schedule) L-10b Stmt	16,447.	16,447.	244,345.
		: Investments — corporate bonds (attach schedule)			
:		Investments — land, buildings, and equipment basis			
		Less accumulated depreciation (attach schedule)			
	12	Investments – mortgage loans			
	13	Investments – other (attach schedule)			
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule)			
		Other assets (describe			
	16	Total assets (to be completed by all filers -	20,432.	18,076.	245,974.
	17	see instructions. Also, see page 1, item I)	91.	0.	243,374.
ī		Accounts payable and accrued expenses	51.	· · · · · · · · · · · · · · · · · · ·	
A B	18 19	Grants payable Deferred revenue			
Ĭ		Loans from officers, directors, trustees, & other disqualified persons			
Ļ	20	Mortgages and other notes payable (attach schedule)			
Ť	21	Other liabilities (describe			
1	22	Other habilities (describes	'		
<u> </u>	23	Total liabilities (add lines 17 through 22)	91.	0.	
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
NF	24	Unrestricted			
N F E U T N	25	Temporarily restricted			
D	26	Permanently restricted			
A B A L A N		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
ĒĻ	27	Capital stock, trust principal, or current funds	20,341.	18,076.	
SN	28	Paid-in or capital surplus, or land, building, and equipment fund	20,011.	20,070	
С	29	Retained earnings, accumulated income, endowment, or other funds			
O E R S	30	Total net assets or fund balances (see the instructions)	20,341.	18,076.	
_	31	Total liabilities and net assets/fund balances (see the instructions)	20,432.	18,076.	
Part	1113	Analysis of Changes in Net Assets or Fund Balance	ces		
				ree with	
'	end-	I net assets or fund balances at beginning of year — Part II, colu of-year figure reported on prior year's return)	min (a), mie so (must ay	1	20,341.
		r amount from Part I, line 27a		2	-2,321.

Par 1 2 56. 3 Other increases not included in line 2 (itemize) 4 18,076. Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 18,076. 6 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30

	(a) List and describe	e the kind(s) of property sold (e.g., r se, or common stock, 200 shares ML	eal estate,	(b) How acc P — Purch D — Dona	ase	(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
				D — Dolla	LIOIT		<u> </u>
			· · · · · · · · · · · · · · · · · · ·				
							
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other bas plus expense of sale			(h) Gain or (e) plus (f) m	
a	1						
t)						
	·						
	1						
•			· · · · · · · · · · · · · · · · · · ·				
	Complete only for assets show	ing gain in column (h) and owned by	the foundation on 12/31/69			(I) Gains (Colu	
	(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column over column (j), if an			pain minus column (k an -0-) or Losses (fr	
a)						
į)						
	:						
	i						
	•						-
2	Capital gain net income or (net	capital loss) — If gain, also	enter in Part I, line 7 der -0- in Part I, line 7		2		
3	Net short-term capital gain or (loss) as defined in sections 1222(5)	and (6)				
	If gain, also enter in Part I, line	8 column (c) (see the instructions)	If (loss), enter -0- ⊢				
	in Part I, line 8 Qualification Unde	e 8, column (c) (see the instructions) r Section 4940(e) for Reduce e foundations subject to the section 4	d Tax on Net Investme				
(For If se	optional use by domestic private ction 4940(d)(2) applies, leave the foundation liable for the seces, the foundation does not qual	r Section 4940(e) for Reduce e foundations subject to the section 4 his part blank tion 4942 tax on the distributable am lify under section 4940(e) Do not con	d Tax on Net Investmen 940(a) tax on net investmen ount of any year in the base mplete this part	t income)	me	Yes	X No
(For If se	optional use by domestic private ction 4940(d)(2) applies, leave the foundation liable for the seces, the foundation does not qual Enter the appropriate amount in the properties of the seces. (a) Base period years Calendar year (or tax year)	r Section 4940(e) for Reduce e foundations subject to the section 4 his part blank tion 4942 tax on the distributable am	d Tax on Net Investmen 940(a) tax on net investmen ount of any year in the base mplete this part	period?	me	(d) Distribution umn (b) divided	ratio
(For If se	optional use by domestic private optional use by domestic private oction 4940(d)(2) applies, leave the foundation liable for the seces, the foundation does not qual Enter the appropriate amount in Base period years Calendar year (or tax year beginning in)	r Section 4940(e) for Reduce foundations subject to the section 4 his part blank tion 4942 tax on the distributable amily under section 4940(e). Do not con each column for each year, see the (b). Adjusted qualifying distributions	d Tax on Net Investmen 940(a) tax on net investmen ount of any year in the base mplete this part e instructions before making (c) Net value of noncharitable-use assi	t income) period? any entrie	me	(d) Distribution	ratio by column (c))
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(For If see Was If 'Ye' 1	optional use by domestic private optional use by domestic private otion 4940(d)(2) applies, leave the foundation liable for the seces, the foundation does not qual Enter the appropriate amount in (a) Base period years Calendar year (or tax year beginning in) 2008 2007 2006 2005 2004 Total of line 1, column (d) Average distribution ratio for the number of years the foundation.	r Section 4940(e) for Reduce e foundations subject to the section 4 his part blank tion 4942 tax on the distributable am ify under section 4940(e) Do not con n each column for each year, see the (b) Adjusted qualifying distributions 14,448. 13,548. 13,521. 11,536. 8,591. de 5-year base period – divide the tot n has been in existence if less than 5 table-use assets for 2009 from Part 2	d Tax on Net Investmen 940(a) tax on net investmen ount of any year in the base instructions before making (c) Net value of noncharitable-use associated associat	period? any entrie ets 0,600. 6,094. 8,260.	2 3	(d) Distribution	0.048064 0.044261 0.053388 0.047198 0.038019 0.230930 0.046186 252,021.
(For If see Was If 'Ye 1	optional use by domestic private optional use by domestic private otion 4940(d)(2) applies, leave the foundation liable for the seces, the foundation does not qual Enter the appropriate amount in Base period years Calendar year (or tax year beginning in) 2008 2007 2006 2005 2004 Total of line 1, column (d) Average distribution ratio for the number of years the foundation. Enter the net value of noncharic Multiply line 4 by line 3 Enter 1% of net investment incomes and the second in	r Section 4940(e) for Reduce e foundations subject to the section 4 his part blank tion 4942 tax on the distributable am ify under section 4940(e) Do not con n each column for each year, see the (b) Adjusted qualifying distributions 14,448. 13,548. 13,521. 11,536. 8,591. de 5-year base period – divide the tot n has been in existence if less than 5 table-use assets for 2009 from Part 2	d Tax on Net Investmen 940(a) tax on net investmen ount of any year in the base instructions before making (c) Net value of noncharitable-use associated associat	period? any entrie ets 0,600. 6,094. 8,260.	2 3 4	(d) Distribution	0.048064 0.044261 0.053388 0.047198 0.038019 0.230930 0.046186 252,021. 11,640.
(For If see Wass If 'Ye 1	optional use by domestic private optional use by domestic private otion 4940(d)(2) applies, leave the foundation liable for the seces, the foundation does not qual Enter the appropriate amount in (a) Base period years Calendar year (or tax year beginning in) 2008 2007 2006 2005 2004 Total of line 1, column (d) Average distribution ratio for the number of years the foundation Enter the net value of nonchard Multiply line 4 by line 3 Enter 1% of net investment incomes and the seces of t	r Section 4940(e) for Reduce e foundations subject to the section 4 his part blank tion 4942 tax on the distributable am ify under section 4940(e) Do not con n each column for each year, see the (b) Adjusted qualifying distributions 14,448. 13,548. 13,521. 11,536. 8,591. te 5-year base period – divide the tot n has been in existence if less than 5 table-use assets for 2009 from Part 2 frome (1% of Part I, line 27b)	d Tax on Net Investmen 940(a) tax on net investmen ount of any year in the base instructions before making (c) Net value of noncharitable-use associated associat	period? any entrie ets 0,600. 6,094. 8,260.	2 3 4 5	(d) Distribution	0.048064 0.044261 0.053388 0.047198 0.038019 0.230930 0.046186

		-603				Page 4	
	t VI` Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – se	the in	structio	ns)			
Į:	a Exempt operating foundations described in section 4940(d)(2), check here ▶ □ and enter 'N/A' on line 1	1					
	Date of ruling or determination letter: (attach copy of letter if necessary - see instr.)						
١	Domestic foundations that meet the section 4940(e) requirements in Part V,	1				55.	
	check here ► X and enter 1% of Part I, line 27b						
•	c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)						
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable				<u> </u>		
_	foundations only Others enter -0-)	2				<u> </u>	
3	Add lines 1 and 2	3				<u>55.</u>	
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	> 5		- C	55.	
6	Credits/Payments	Ì	*		***		
	a 2009 estimated tax pmts and 2008 overpayment credited to 2009 6a 65	-					
	b Exempt foreign organizations — tax withheld at source 6b C Tax paid with application for extension of time to file (Form 8868) 6c 0	-			•		
	,	-			*		
		7				65	
_	Total credits and payments Add lines 6a through 6d Enter any penalty for underpayment of estimated tax. Check here	8		—		65.	
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached. Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed.	► 8 9					
9	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	► 10				10.	
11		► 11	+			10.	
	t VII-A Statements Regarding Activities		1				
			Г		Yes	No	
7 :	a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?			1 a	103	X	
ı	b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?			1 b		x	
	If the answer is 'Yes' to <i>1a</i> or <i>1b</i> , attach a detailed description of the activities and copies of any materials purely or distributed by the foundation in connection with the activities	olished	·			شد	
(c Did the foundation file Form 1120-POL for this year?			1 c		Х	
(d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year		ſ			.,	
	(1) On the foundation \$ (2) On foundation managers \$ Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed						
,	foundation managers	лт	ĺ		3	44	
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?			2		X	
	If 'Yes,' attach a detailed description of the activities					ě.	
2	•		- 1				
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		Х	
4:	a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		F	4a		Х	
	b If 'Yes,' has it filed a tax return on Form 990-T for this year?			4b			
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?			5		Х	
	If 'Yes,' attach the statement required by General Instruction T		Γ			*	
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either		A	,		,	
	By language in the governing instrument, or			J	·	^ '	
	Ry state legislation that effectively amends the governing instrument so that no mandatory directions that co	nflict	4		- de	س نس	
	• By state legislation that effectively amends the governing instrument so that no mandatory directions that co with the state law remain in the governing instrument?			6	Х		
7	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV			7	Х		
8	a Enter the states to which the foundation reports or with which it is registered (see the instructions)		_	. 4			
	TX - Texas		_	· ,	rgi:	1.	
1	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		-		3,5		
			-	8b	X	-	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If 'Yes,' complete	4942())(5) -	9		X	
			\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	J	-	 ^-	
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their nand addresses	ames		10	x		
BAA				<u> </u>		(2009)	
						·/	

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Part	t VII-A Statements Regarding Activities Continued			
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		<u>x</u> _
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	Х	
	Website address N/A	 -		
14	The books are in care of ► ELSIE W. THOMPSON Telephone no ► (43		5-05	_5
- -	Located at > 105 WEST HIGH STREET CHARLOTTSVILLE VA ZIP + 4 > 22902-	20TR -		 -
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here			
Dd	and enter the amount of tax-exempt interest received or accrued during the year			
rari	t VII-B Statements Regarding Activities for Which Form 4720 May Be Required		Tv	N.
1.	File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.		Yes	No
ıa	a 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 X	٠ مه		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? [X] Yes	10		_
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes		:	
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes		2.	
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	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 X	No		
	(C) A to now we are a second to a second of second of the Charle Medication			
	(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 X	No	٠	à -
ь	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 the instructions)?	1	b	
	Organizations relying on a current notice regarding disaster assistance check here		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	
c	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?	1		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))	***	. *	
а	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 XII	No 3		
	If 'Yes,' list the years ► 20, 20, 20] ,	3	x -4
b	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 the instructions)	2		X
c	c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here	-	٠,	
	► 20, 20, 20			-
3 9	a Did the foundation hold more than a 2% direct or indirect interest in any business			**
Ja	enterprise at any time during the year? Yes X	No 🗼 🗦	133	2.34.3
b	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 arguing by after the period approved by the commissioner under section 4943(c)(7).			
	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.)	3	b *****	
4 a	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4	a	X
L.	b Did the foundation make any investment in a prior year (but after December 31, 1969) that could	1.1	e Æ	R#
L,	jeopardize its charitable purpose that had not been removed from jeopardy before the first day of	بينية ا	كننشأ	أنكتند
	the tax year beginning in 2009?	4		X
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Form 990-PF (2009) Kathleen Jones Ale			74-603	39211	Page (
Part VII-B Statements Regarding Activiti		1 4/20 IVIAY BE REQ	uirea (continuea)		
5a During the year did the foundation pay or incur	•	(t 404E(-))2		AL SW 0	2
(1) Carry on propaganda, or otherwise attempt	-	•	Yes X	NO	
(2) Influence the outcome of any specific public on, directly or indirectly, any voter registral	tion drive?			No	
(3) Provide a grant to an individual for travel,		•	∐ Yes X	No	
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	an a charitable, etc, org 4940(d)(2)? (see instru	janization described ctions)	Yes X	No	
(5) Provide for any purpose other than religiou educational purposes, or for the prevention			Yes X	No	
b If any answer is 'Yes' to 5a(1)-(5), did any of the described in Regulations section 53 4945 or in (see instructions)?	he transactions fail to qual a current notice regardi	ualify under the exception ng disaster assistance	ons	5b	·
Organizations relying on a current notice regar	ding disaster assistance	e check here	▶ 🗌		
c If the answer is 'Yes' to question 5a(4), does the tax because it maintained expenditure responsing if 'Yes,' attach the statement required by Regulations in	ibility for the grant?		Yes	No	, ,
6a Did the foundation, during the year, receive any		•	□v	No.	į
on a personal benefit contract? b Did the foundation, during the year, pay premium	ums, directly or indirectl	y, on a personal benefit	Yes X contract?	6b	X
If 'Yes' to 6b, file Form 8870					
7a At any time during the tax year, was the foundate			L		
b If yes, did the foundation receive any proceeds	or have any net income	e attributable to the tran	saction?	7b	
Part VIII Information About Officers, D	irectors, Trustees,	Foundation Manag	gers, Highly Paid E	.mployees	5,
1 List all officers, directors, trustees, foundation	n managers and their co	omnensation (see instru	ıctions)		
List an officers, directors, trastees, roundation	(b) Title and average	(c) Compensation	(d) Contributions to	(e) Expens	e account
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	employee benefit plans and deferred compensation	other all	
W. MCILWAINE THOMPSON, JR.					
105 W. HIGH ST	DIRECTOR AS NEEDED				
CHARLOTTESVILLE VA 22902-5018	1.00	0.	0.		0.
ELSIE W. THOMPSON					
105 W. HIGH ST	DIRECTOR AS NEEDED				
CHARLOTTESVILLE VA 22902-5018	1.00	0.	0.		0.
				_	•
2 Compensation of five highest-paid employees	s (other than those incl	uded on line 1- see ins	tructions). If none, ente	r '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) Expens other all	
NONE			oompensation.		
0					
0					
0					·· ·
0					
				_	-
Total number of other employees paid over \$50,000				F 00	None
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3 Five highest-paid independent contractors for professional services — (see in enter 'NONE.	structions). If 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	>	None
RantiX:A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical in organizations and other beneficiaries served, conferences convened, research papers produced, etc.	nformation such as the number of	Expenses
Control of the contro		Expenses
1 NONE		
		0.
2		
3		
4		
web V . S Wil		
Part X:B Summary of Program-Related Investments (see instruct	ions)	
Describe the two largest program-related investments made by the foundation during	the tax year on lines 1 and 2	Amount
1 NONE		
		0.
2		
All other program-related investments. See instructions		
3		
Total. Add lines 1 through 3	•	None

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Form 990-PF (2009) Kathleen Jones Alexander Foundation

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6 Adjusted qualifying distributions. Subtract line 5 from line 4

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Minimum Investment Return (All domestic foundations must complete this part. F see instructions.)	oreign fo	undations,
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	1 a	252,173.
b Average of monthly cash balances	1 b	3,686.
c Fair market value of all other assets (see instructions)	1c	
d Total (add lines 1a, b, and c)	1 d	255,859.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c		
(attach detailed explanation)		
2 Acquisition indebtedness applicable to line 1 assets	2	
3 Subtract line 2 from line 1d	3	<u>255,859.</u>
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3		
(for greater amount, see instructions)	4	3,838.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	252,021.
6 Minimum investment return. Enter 5% of line 5	6	12,601.
PartXIII Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operations		ndations
and certain foreign organizations check here ► and do not complete this p	oart.)	10.501
1 Minimum investment return from Part X, line 6	7/10/400	12,601.
2a Tax on investment income for 2009 from Part VI, line 5 2a 55	∸ \$\$\$	
b Income tax for 2009 (This does not include the tax from Part VI)		
c Add lines 2a and 2b	2c	55.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	12,546.
4 Recoveries of amounts treated as qualifying distributions	4	10.516
5 Add lines 3 and 4	5	12,546.
6 Deduction from distributable amount (see instructions)	6	40.510
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	12,546.
Part XII Qualifying Distributions (see instructions)		
1 Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes		10 750
a Expenses, contributions, gifts, etc – total from Part I, column (d), line 26	1 a	12,750.
b Program-related investments — total from Part IX-B	1 b	0.
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2	
 Amounts set aside for specific charitable projects that satisfy the Suitability test (prior IRS approval required) 	3a	
b Cash distribution test (attach the required schedule)	3 b	
4 Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	12,750.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I. line 27b (see instructions)	5	55.

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

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Form **990-PF** (2009)

12,695.

6

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				12,546.
2 Undistributed income, if any, as of the end of 2009.	ž.'			12,540.
a Enter amount for 2008 only	,		12,122.	,
b Total for prior years 20 , 20 , 20				
3 Excess distributions carryover, if any, to 2009.				
a From 2004 0.				
b From 2005 0.				
c From 2006 0.				
d From 2007 0.				
e From 2008 0.				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part				
XII, line 4 ► \$ 12,750.				
a Applied to 2008, but not more than line 2a			12,122.	
b Applied to undistributed income of prior years			12,122.	4
(Election required – see instructions) c Treated as distributions out of corpus				
(Election required – see instructions)				633
d Applied to 2009 distributable amount				628.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))				
	۵.			« ·
6 Enter the net total of each column as indicated below:	\$ ⁶ *			·
a Corpus. Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b	*	0.		*
c Enter the amount of prior years' undistribut- ed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed			*	,
d Subtract line 6c from line 6b Taxable amount — see instructions		0.	÷ 🐞	
e Undistributed income for 2008. Subtract line 4a from line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2009 Subtract lines		*	, #	
4d and 5 from line 1. This amount must be distributed in 2010				11,918.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	:	* - *	iὲ · · ·,	E _s
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	0.	*	,	٠
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.		Bus.	
10 Analysis of line 9:				
a Excess from 2005 0.		*		, ,
b Excess from 2006 0.		·, '		,
c Excess from 2007 0.		•		
d Excess from 2008 0.				
e Excess from 2009 0.		<u> </u>		*

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PartXIX Private Operating Foundation	ns (see instruc	tions and Part	VII-A, question 9	9)	N/A
1a If the foundation has received a ruling or do is effective for 2009, enter the date of the r	uling	•	. •	_ ` •	_
b Check box to indicate whether the foundation		ating foundation de		4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year Prior 3 years			(4) 2000	(a) Tatal
investment return from Part X for each year listed	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
b 85% of line 2a					
 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 XVA Supplementary Information	(Complete this	part only if the	organization ha	ad \$5,000 or more	e in
assets at any time during th		structions.)			
1 Information Regarding Foundation Manag a List any managers of the foundation who had		re than 2% of the to	atal contributions rec	awad by the foundation	on before the
close of any tax year (but only if they have	contributed more the	nan \$5,000) (See s	section 507(d)(2))	erved by the loundation	on before the
W. MCILWAINE THOMPSON, JR.					
b List any managers of the foundation who o	un 10% or more of	the stock of a corn	oration (or an equal)	y large portion of the	ownership of
a partnership or other entity) of which the f	oundation has a 10	% or greater interes	st	y large portion of the	ownership of
NONE					
O lefe water Departing Contribution Con-	Cit Loon Cabal				- .
2 Information Regarding Contribution, Gran Check here X if the foundation only m requests for funds If the foundation makes complete items 2a, b, c, and d	akes contributions	to preselected char	itable organizations		
a The name, address, and telephone number	of the person to w	hom applications sl	hould be addressed	,	
N/A		FF			
b The form in which applications should be s N/A	ubmitted and inforn	nation and material	s they should include	3	
c Any submission deadlines N/A					-
d Any restrictions or limitations on awards, s N/A	uch as by geograph	nical areas, charitab	ole fields, kinds of ins	stitutions, or other fac	tors
		· · · · · · · · · · · · · · · · · · ·			

Paciniant			If recipient is an individual,	Foundation		
Recipient			If recipient is an individual, show any relationship to any foundation manager or	status of	Purpose of grant or contribution	Amount
Name and address (home or	busine	ess)	substantial contributor	recipient	Contribution	
a Paid during the year						
BOYS/GIRLS CLUB					OPERATIONS	
PO BX 707,				PUBLIC		
CHARLOTTESVILLE	VA	22902				5,000
GARTH NEWEL MUSIC CENT	CER				OPERATIONS	
PO BX 240				PUBLIC		
WARM SPRINGS	VA	24484				1,250
THE PARAMOUNT THEATRE					OPERATIONS	
215 E. MAIN ST.,				PUBLIC		
CHARLOTTESVILLE	VA	22902				5,000
PLANNED PARENTHOOD					EDUCATIONAL	
2964 HYDRAULIC ROAD				PUBLIC	PROGRAMMING	
CHARLOTTESVILLE	VA	22901				1,000
						·
					<u> </u>	10.050
Total					► 3a	12,250
b Approved for future payment						

Enter	gross amounts unless otherwise indicated.	Unrelat	ed business income	Exclude	d by section 512, 513, or 514		
1	Program service revenue	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	(e) Related or exempt function income (see the instructions)	
а							
b							
С							
d					-		
e						=	
f	44-11	 					
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	5,984.		
5	Net rental income or (loss) from real estate:	SEE SEE SEE	VALUE OF THE PROPERTY.	44	To A Shipping	Markari en tu	
а	Debt-financed property						
	Not debt-financed property						
6	Net rental income or (loss) from personal property		<u> </u>				
7	Other investment income						
8	Gain or (loss) from sales of assets other than inventory			18			
9	Net income or (loss) from special events						
10	Gross profit or (loss) from sales of inventory						
11	Other revenue		State of the state of the	10 E	arial W	i de la colòmica del colòmica del colòmica de la colòmica del colòmica de la colòmica del colòmica de la colòmica del colòmica d	
а							
b					·		
c							
d							
е							
12	Subtotal Add columns (b), (d), and (e)	Section 1			5,984.		
13	Total. Add line 12, columns (b), (d), and (e)				13	5,984.	
(See	worksheet in the instructions for line 13 to verify of	alculations)					

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See the instructions)
	

Part XVII Information Regarding Transfers To ar Exempt Organizations	nd Transactions and Relationships With N	loncharitable	•	
		214 34.4	Yes	No
1 Did the organization directly or indirectly engage in any of the described in section 501(c) of the Code (other than section relating to political organizations?	ne following with any other organization 501(c)(3) organizations) or in section 527,		調	
a Transfers from the reporting foundation to a noncharitable e	xempt organization of	4	2	
(1) Cash		1a(1)		Х
(2) Other assets		1 a (2)		X
b Other transactions		-		
(1) Sales of assets to a noncharitable exempt organization		1 b (1)		Х
(2) Purchases of assets from a noncharitable exempt organ	lization	1 b (2)		Х
(2) Dentel of feetilise comment or other accets		16(3)		v

D Other	liansactions]		
(1) S	ales of assets to a nonc	charitable exer	mpt organization					1 b (1)		X
(2) Purchases of assets from a noncharitable exempt organization								1 b (2)		X
(3) Rental of facilities, equipment, or other assets										X
(4) Reimbursement arrangements										<u>х</u>
(5) Loans or loan guarantees										X
(6) Performance of services or membership or fundraising solicitations										X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees										<u>т —</u>
Conain	ng or racinities, equipme	iii, iiiaiiiig iis	is, other assets, or paid	Simployees				1c		
the or	oods other assets or se	ervices diven l	complete the following so by the reporting foundation how in column (d) the val	on If the fou	ındatıor	n received less	s than fair marke	et value in	ή 	
(a) Line no	(b) Amount involved	(c) Name	of noncharitable exempt organiz	ation	(d) D	escription of trans	sfers, transactions, a	ind sharing arrange	ements	
			·							
		1					•			
			<u> </u>				7			
		-								
										
						-				
•										_
		-								
		-								_
								· · · · · · · · · · · · · · · · · · ·		
		· 	<u>, , , , , , , , , , , , , , , , , , , </u>							
			· · · · · · · · · · · · · · · · · · ·	-						
	<u> </u>	1								
2a Is the descr	foundation directly or in tibed in section 501(c) o	ndirectly affilia of the Code (ot	ated with, or related to, o her than section 501(c)(3	ne or more t 3)) or in sect	tax-exe tion 52	mpt organizat 72	tions	Yes	X N	0
b If 'Ye	s,' complete the following	ng schedule			—т-					
	(a) Name of organization	on	(b) Type of orga	inization		(c) Description of	relationship		
	·		<u> </u>		\perp					
			ļ							
Under pen	alties of perjury, I declare that I Declaration of preparer (other the	I have examined the	his return, including accompanyi duciary) is based on all informat	ng schedules and on of which pre	nd stateme	ents, and to the be any knowledge	est of my knowledge a	and belief, it is true,	correct,	and
	α_{1}	P		,	_					
	Hur Wil	Long	you Troites		1 Not	V. 12.200	- Direc	TOR		
S Sign	nature of officer or trustee		7 7		Date	<u>,—</u>	Title			
G Sign	1				Date		F	Preparer's Identifying	g numbe	r
H Paid	Preparer's > /1/.		Parel.		11-	در نے	Check if (See Signature in th	e instrs)	

S I G	complete	alties of perjury, I de Declaration of prepa	clare that I have examined this return, including accompanying rer (other than taxpayer or fiduciary) is based on all information to the companying that is the companying that it is the companying that is the companying that it is the companying that i	schedules and of which pre	d statements, and to the parer has any knowledge //www./2,20/		
NHED	Paid Pre-	Preparer's signature	Maria P. arechi		Date 1/-5-10	Check if self-employed ► X	Preparer's Identifying number (See Signature in the instrs)
Ë	parer's Use	Firm's name (or	GLORIA P ARECCHI CPA			EIN ►	
	Use Only	yours if self- employed),	130 CROFTON AVE.				
	,	address, and ZIP code	SAN ANTONIO	TX	78210	Phone no	(210) 223-3030
В	AA						Form 990-PF (2009

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

Department of the Treasury Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2009

Employer identification number

Kathleen Jones Alexander Foundation 74-6039211 Organization type (check one): Filers of: Section: Form 990 or 990-EZ 501(c)() (enter number) organization 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization Form 990-PF 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions General Rule -For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor (Complete Parts I and II) Special Rules -For a section 501(c)(3) organization filing Form 990 or 990-EZ, that met the 33-1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1 Complete Parts I and II For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ, that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ, that received from any one contributor, during the year contributions for use *exclusively* for religious, charitable, etc, purposes, but these contributions did not aggregate to more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc, purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year Caution: An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF) but it must answer 'No' on Part IV, line 2 of their Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF) BAA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990, 990EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

	B (Form 990, 990-EZ, or 990-PF) (2009)	Page 1	of 1 of Part I
Name of org Kathle	een Jones Alexander Foundation	' -	r identification number 039211
Part I	Contributors (see instructions)	-	
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	W. McILWAINE THOMPSON, JR 105 WEST HIGH STREET CHARLOTTESVILLE VA 22902	\$5,000.	Person X Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
	 	\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution)

(b)

Name, address, and ZIP + 4

(a)

Number

(c) Aggregate contributions (d)

Type of contribution

Person Payroll SUBSTANTIAL CONTRIBUTOR, PART VII-A, LINE 10

Additional Information

W. McILWAINE THOMPSON, JR

105 WEST HIGH STREET

CHARLOTTESVILLE, VA 22902

Form 990-PF, Page 1, Part I Line 16b - Accounting Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
G P ARECCHI	PREPARATION OF FORM 99	1,000.	500.		500.
Total		1,000.	500.		500.

Form 990-PF, Page 2, Part II, Line 10b

L-10b Stmt

	End of Year			
Line 10b - Investments - Corporate Stock:	Book Value	Fair Market Value		
INTEL 400 SHS	6,547.	8,160.		
EXXON MOBIL 3463.63 shs	9,900.	236,185.		
Total	16,447.	244,345.		

Supporting Statement of:

Form 990-PF, p2/Line 9(b)

Description	Amount
PREPAID EXCISE TAX	10.
Total	10.

Supporting Statement of:

Form 990-PF, p2/Line 9(c)

Description	Amount
PREPAID EXCISE TAX	10.
Total	10.