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Form **990-PF****Return of Private Foundation**
or Section 4947(a)(1) Nonexempt Charitable Trust

OMB No 1545-0052

Treated as a Private Foundation

2009Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning

, 2009, and ending

, 20

G Check all that apply

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

Name of foundation

EDWARD & WILHELMINA ACKERMAN FOUNDATION

A Employer identification number

75-2681488

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

Room/suite

5956 SHERRY LANE

1600

B Telephone number (see page 10 of the instructions)

(214) 361-5383

City or town, state, and ZIP code

DALLAS, TX 75225

C If exemption application is
pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the
85% test, check here and attach
computation ☐E If private foundation status was terminated
under section 507(b)(1)(A) check here ☐F If the foundation is in a 60-month termination
under section 507(b)(1)(B) check here ☐H Check type of organization ☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundation

I Fair market value of all assets at end

J Accounting method ☒ Cash ☐ Accrual

of year (from Part II, col (c), line

☐ Other (specify)

16) \$ 10,545,205.

(Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses (The
total of amounts in columns (b), (c), and (d)
may not necessarily equal the amounts in
column (a) (see page 11 of the instructions).)(a) Revenue and
expenses per
books(b) Net investment
income(c) Adjusted net
income(d) Disbursements
for charitable
purposes
(cash basis only)

1 Contributions, gifts, grants, etc., received (attach schedule)

438,000.

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

3 Interest on savings and temporary cash investments

62,672.

62,672.

ATCH 1

4 Dividends and interest from securities

210,522.

210,522.

ATCH 2

5a Gross rents

b Net rental income or (loss)

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

3,930,886.

b Gross sales price for all
assets on line 6a 6,011,883.

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

3,930,886.

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) (attach schedule)

11 Other income (attach schedule)

12 Total. Add lines 1 through 11

4,642,080.

4,204,080.

13 Compensation of officers, directors, trustees, etc.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule) ATCH 3

2,068.

0.

0.

0.

b Accounting fees (attach schedule) ATCH 4

4,332.

0.

0.

4,332.

c Other professional fees (attach schedule)

17 Interest

15,558.

18 Taxes (attach schedule) (see page 14 of the instructions)

19 Depreciation (attach schedule) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule) ATCH 6

91.

24 Total operating and administrative expenses.

Add lines 13 through 23

22,049.

0.

0.

4,332.

25 Contributions, gifts, grants paid

1,434,749.

1,434,749.

26 Total expenses and disbursements. Add lines 24 and 25

1,456,798.

0.

0.

1,439,081.

27 Subtract line 26 from line 12

3,185,282.

a Excess of revenue over expenses and disbursements

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

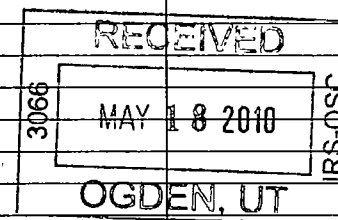
4,204,080.

c Adjusted net income (if negative, enter -0-)

-0-

Revised JUNE 2 2009

Operating and Administrative Expenses



Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments	24,216.	48,669.	48,669.	
	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 (attach schedule) (see page 16 of the instructions)				
	7	Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10 a	Investments - U S and state government obligations (attach schedule) **	0.	2,968,311.	2,841,090.	
	b	Investments - corporate stock (attach schedule) <u>ATCH 8</u>	5,245,717.	4,957,329.	6,714,630.	
	c	Investments - corporate bonds (attach schedule)				
	11	Investments - land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶				
	12	Investments - mortgage loans				
	13	Investments - other (attach schedule) <u>ATCH 9</u>	1,438,847.	925,256.	925,256.	
	14	Land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶				
15	Other assets (describe ▶ <u>ATCH 10</u>)	60,800.	15,560.	15,560.		
16	Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	6,769,580.	8,915,125.	10,545,205.		
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 (attach schedule)				
	22	Other liabilities (describe ▶ <u>ATCH 11</u>)	4,000.	0.		
23	Total liabilities (add lines 17 through 22)	4,000.	0.			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>					
	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. ▶ <input checked="" type="checkbox"/>					
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds	6,765,580.	8,915,125.		
30	Total net assets or fund balances (see page 17 of the instructions)	6,765,580.	8,915,125.			
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	6,769,580.	8,915,125.			

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	6,765,580.
2	Enter amount from Part I, line 27a	2	3,185,282.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	9,950,862.
5	Decreases not included in line 2 (itemize) ▶ <u>ATTACHMENT 12</u>	5	1,035,737.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	8,915,125.

** ATCH 7

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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 SEE PART IV SCHEDULE				
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	3,930,886.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8 }		3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	934,441.	12,426,495.	0.075197
2007	711,370.	12,371,038.	0.057503
2006	528,879.	9,864,395.	0.053615
2005	669,584.	8,378,580.	0.079916
2004	440,131.	6,087,684.	0.072299

2 Total of line 1, column (d)	2	0.338530
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	0.067706
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	10,162,750.
5 Multiply line 4 by line 3	5	688,079.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	42,041.
7 Add lines 5 and 6	7	730,120.
8 Enter qualifying distributions from Part XII, line 4	8	1,439,081.

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 18 of the instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of ruling letter if necessary - see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	42,041.
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	
3 Add lines 1 and 2		3	42,041.
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	42,041.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	15,560.	
b Exempt foreign organizations-tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	0.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	15,560.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	26,481.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be. Credited to 2010 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ _____ (2) On foundation managers \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
4b If "Yes," has it filed a tax return on Form 990-T for this year?		X
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) TX,		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	X	

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Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ☐ N/A

14 The books are in care of ☐ EDWARD M. ACKERMAN Telephone no ☐ 214-361-5383
 Located at ☐ 5956 SHERRY LANE #1600 DALLAS, TX ZIP + 4 ☐ 75225

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

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b	
Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years <input type="checkbox"/>		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see page 20 of the instructions)	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <input type="checkbox"/>		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?Organizations relying on a current notice regarding disaster assistance check here ☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ATTACHMENT 13		-0-	-0-	-0-

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

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

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

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

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

Total number of others receiving over \$50,000 for professional services NONE

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 (see page 23 of the instructions)

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	9,001,982.
b	Average of monthly cash balances	1b	1,299,971.
c	Fair market value of all other assets (see page 24 of the instructions)	1c	15,560.
d	Total (add lines 1a, b, and c)	1d	10,317,513.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	10,317,513.
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	154,763.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	10,162,750.
6	Minimum investment return. Enter 5% of line 5	6	508,138.

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

1	Minimum investment return from Part X, line 6	1	508,138.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	42,041.
b	Income tax for 2009. (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	42,041.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	466,097.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	466,097.
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	466,097.

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	1,439,081.
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	0.
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	0.
b	Cash distribution test (attach the required schedule)	3b	0.
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,439,081.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	42,041.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,397,040.

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

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

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				466,097.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only				
b Total for prior years 20 07, 20 06, 20 05				
3 Excess distributions carryover, if any, to 2009				
a From 2004	146,919.			
b From 2005	260,635.			
c From 2006	53,961.			
d From 2007	153,608.			
e From 2008	344,232.			
f Total of lines 3a through e	959,355.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 1,439,081.				
a Applied to 2008, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)				
d Applied to 2009 distributable amount				466,097.
e Remaining amount distributed out of corpus	972,984.			
5 Excess distributions carryover applied to 2009 . (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	1,932,339.			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions				
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions				
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	146,919.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	1,785,420.			
10 Analysis of line 9:				
a Excess from 2005	260,635.			
b Excess from 2006	53,961.			
c Excess from 2007	153,608.			
d Excess from 2008	344,232.			
e Excess from 2009	972,984.			

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

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

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see page 28 of 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))

ATTACHMENT 14

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 page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

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

c Any submission deadlines

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year ATTACHMENT 15				
Total.			▶ 3a	1,434,749.
b Approved for future payment				
Total.			▶ 3b	

Form **990-PF** (2009)

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments				14	62,672.	
4 Dividends and interest from securities				14	210,522.	
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	3,930,886.	
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)					4,204,080.	
13 Total. Add line 12, columns (b), (d), and (e)						4,204,080.

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

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

[illegible]

Schedule of Contributors

OMB No 1545-0047

2009

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

Name of the organization

EDWARD & WILHELMINA ACKERMAN FOUNDATION

Employer identification number

75-2681488

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) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ► \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization **EDWARD & WILHELMINA ACKERMAN FOUNDATION**Employer identification number
75-2681488**Part I Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	EDWARD & WILHELMINA ACKERMAN 5956 SHERRY LANE, SUITE 1600 DALLAS, TX 75225	\$ 438,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

Employer identification number
75-2681488

[illegible]

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
12,626.		192 SH DEVON ENERGY 2,103.					03/25/1999 10,523.	01/08/2009
76,941.		1,170 SH DEVON ENERGY 21,560.					03/16/2000 55,381.	01/08/2009
307,765.		4,680 SH DEVON ENERGY 83,240.					04/05/2000 224,525.	01/08/2009
307,502.		4,676 SH DEVON ENERGY 90,992.					01/19/2001 216,510.	01/08/2009
235.		4 SH DEVON ENERGY 78.					01/19/2001 157.	01/08/2009
549,041.		9,360 SH DEVON ENERGY 101,560.					12/20/2001 447,481.	01/23/2009
274,286.		4,676 SH DEVON ENERGY 51,206.					01/10/2002 223,080.	01/23/2009
462,748.		24,000 SH VALERO ENERGY 218,100.					05/05/2003 244,648.	04/06/2009
347,118.		10,000 SH XTO ENERGY 9,279.					12/23/2002 337,839.	04/17/2009
670,118.		20,000 SH EQUITABLE RESOURCES 481,587.					10/15/2008 188,531.	04/22/2009
525,453.		15,276 SH XTO ENERGY 14,175.					12/23/2002 511,278.	04/30/2009
84,945.		1,943 SH XTO ENERGY 759.					12/30/2003 84,186.	05/08/2009

FORM 990-PF - PART IV**CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
273,265.		6,250 SH XTO ENERGY 5,799.					11/29/2005 267,466.	05/08/2009
163,923.		3,749 SH XTO ENERGY 3,478.					12/22/2005 160,445.	05/08/2009
412,358.		10,000 SH XTO ENERGY 9,281.					12/17/2007 403,077.	05/08/2009
38.		1 SH XTO ENERGY 1.					12/22/2005 37.	05/13/2009
960,610.		1,000,000 U S TREAS NOTE 982,046.					04/22/2009 -21,436.	12/01/2009
162,486.		4,724 SH XTO ENERGY 1,846.					12/30/2003 160,640.	04/30/2009
420,425.		10,000 SH XTO ENERGY 3,907.					12/30/2003 416,518.	05/07/2009
TOTAL GAIN (LOSS)							<u>3,930,886.</u>	

ATTACHMENT 1FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
BANK OF AMERICA	12.	12.
BNP PARIBAS	62,660.	62,660.
TOTAL	<u>62,672.</u>	<u>62,672.</u>

ATTACHMENT 2

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
BNP PARIBAS	210,522.	210,522.
TOTAL	<u>210,522.</u>	<u>210,522.</u>

ATTACHMENT 3FORM 990PF, PART I - LEGAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
LEGAL FEES	2,068.			
TOTALS	<u>2,068.</u>	<u>0.</u>	<u>0.</u>	<u>0.</u>

ATTACHMENT 4FORM 990PF, PART I - ACCOUNTING FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
ACCOUNTING	4,332.			4,332.
TOTALS	<u>4,332.</u>	<u>0.</u>	<u>0.</u>	<u>4,332.</u>

FORM 990PF, PART I - TAXES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>
2008 FEDERAL EXCISE TAX	15,558.
TOTALS	<u>15,558.</u>

ATTACHMENT 6

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION
BANK CHARGES

REVENUE
AND
EXPENSES
PER BOOKS 91.

91.

TOTALS

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONSDESCRIPTION

U S TREAS NOTES 3.125% 5/15/19

US OBLIGATIONS TOTAL

	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
	2,968,311.	2,841,090.
	<u>2,968,311.</u>	<u>2,841,090.</u>

ATTACHMENT 7

FORM 990PF, PART II - CORPORATE STOCKATTACHMENT 8

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
51,942 XTO ENERGY	0.	0.
24,758 DEVON ENERGY	0.	0.
24,000 VALERO ENERGY	0.	0.
8,000 CHEVRON	267,225.	615,920.
16,000 SPTREETRACKS GOLD TRUST	1,207,219.	1,716,960.
20,000 EQUITABLE RESOURCES	0.	0.
40,000 ONEOK INC.	1,100,067.	1,782,800.
5,000 ISHARES TRUST INV GRADE	1,882,947.	2,083,000.
5,000 ISHARES TRUST BARCLAYS	499,871.	515,950.
TOTALS	<u>4,957,329.</u>	<u>6,714,630.</u>

ATTACHMENT 9	
DESCRIPTION	ENDING BOOK VALUE
BNP PARIBAS	ENDING FMV
	925,256.
TOTALS	925,256.

EDWARD & WILHELMINA ACKERMAN FOUNDATION
FORM 990PF, PART II - OTHER ASSETS

ATTACHMENT 10

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
PREPAID EXCISE TAXES	15,560.	15,560.
TOTALS	15,560.	15,560.

FORM 990PF, PART II - OTHER LIABILITIESATTACHMENT 11

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>
CITI CREDIT CARD	0.
TOTALS	<u>0.</u>

ATTACHMENT 12FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCESDESCRIPTIONAMOUNT

BOOK/TAX DIFFERENCE ON SALES OF
SALES OF XTO ENERGY STOCK

1,035,737.

TOTAL

1,035,737.

EDWARD & WILHELMINA ACKERMAN FOUNDATION

75-2681488

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 13

TITLE AND AVERAGE HOURS PER
WEEK DEVOTED TO POSITION

NAME AND ADDRESS

EDWARD M. ACKERMAN
5956 SHERRY LANE SUITE 1600
DALLAS, TX 75225

PRESIDENT/DIRECTOR
1.00

WILHELMINA B. ACKERMAN
5956 SHERRY LANE SUITE 1600
DALLAS, TX 75225

VICE PRES/DIRECTOR
1.00

DAVID B. ACKERMAN
5956 SHERRY LANE SUITE 1600
DALLAS, TX 75225

SECRETARY/DIRECTOR
1.00

SAMANTHA ACKERMAN SIMONS
5956 SHERRY LANE SUITE 1600
DALLAS, TX 75225

TREASURER/DIRECTOR
1.00

EDWARD W. ACKERMAN
5956 SHERRY LANE SUITE 1600
DALLAS, TX 75225

DIRECTOR
1.00

PAULA ACKERMAN MENENDEZ
5956 SHERRY LANE, SUITE 1600
DALLAS, TX 75225

DIRECTOR
1.00

GRAND TOTALS

FORM 990PF, PART XV - INFORMATION REGARDING FOUNDATION MANAGERS

EDWARD M. ACKERMAN
WILHELMINA ACKERMAN

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 15

RECIPIENT NAME AND ADDRESS		RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
THE LAMPLIGHTER SCHOOL 11611 INWOOD ROAD DALLAS, TX 75229		EDUCATION ORGANIZATION		4,000
MEDIA RESEARCH CENTER 325 SOUTH PATRICK STREET ALEXANDRIA, VA 22314-3580		MEDIA RESEARCH ORGAN		75,000
UNIV OF TEXAS - SOUTHWESTERN MED CENTER 2305 CEDAR SPRINGS RD #150 DALLAS, TX 75201		MEDICAL RESEARCH ORGAN		1,750
THE SOCIETY FOR CLASSICAL REFORM JUDAISM 15 NEWBERRY STREET BOSTON, MA 02116		EDUCATION ORGANIZATION		25,000
THE HOCKADAY SCHOOL 11600 WELCH ROAD DALLAS, TX 75229-2999		EDUCATION ORGANIZATION		514,000
ST MARK'S SCHOOL OF TEXAS 10600 PRESTON ROAD DALLAS, TX 75230-4000		EDUCATION ORGANIZATION		27,500

ATTACHMENT 15

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5/13/2010

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FORM 990EF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 15 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NATIONAL LEGAL AND POLICY CENTER 107 PARK WASHINGTON COURT FALLS CHURCH, VA 22046	CIVIC ORGANIZATION		4,000
THE LEADERSHIP INSTITUTE 1101 NORTH HIGHLAND STREET ARLINGTON, VA 22201	EDUCATION ORGANIZATION		30,000.
C A M E R A - NATIONAL MEDIA RESEARCH CENTER P O BOX35040 BOSTON, MA 02135-0001	MEDIA RESEARCH CENTER		2,500
YOUNG AMERICA'S FOUNDATION 110 ELDON STREET HERNDON, VA 20170	EDUCATION ORGANIZATION		10,000
PARENTS TELEVISION COUNCIL 707 WILSHIRE BLVD LOS ANGELOS, CA 90017	CIVIC ORGANIZATION		5,000
UNIVERSITY OF TEXAS AT DALLAS P O BOX 830688 RICHARDSON, TX 75083	EDUCATION ORGANIZATION		200,000

FORM 990FE, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 15 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
FUND FOR AMERICAN STUDIES 1706 NEW HAMPSHIRE AVE N W WASHINGTON, DC 20009	EDUCATION ORGANIZATION		5,000
COMMUNITY FOUNDATION OF JACKSON HOLE 55 EAST SIMPSON STREET JACKSON HOLE, WY 83001	CIVIC ORGANIZATION		500
DAVID HOROWITZ FREEDOM CENTER 14148 MAGNOLIA BLVD SUITE 103 SHERMAN OAKS, CA 91423	CIVIC ORGANIZATION		3,000
GREAT INVESTORS' BEST IDEAS FOUNDATION 1901 N AKARD DALLAS, TX 75201	MEDICAL RESEARCH ORGAN		1,000
U S HOLOCAUST MEMORIAL MUSEUM 100 RAOUL WALLENBURG PLACE, SW WASHINGTON, DC 20008	HISTORIC ORGANIZATION		25,000
CAPITAL RESEARCH CENTER 1513 16TH STREET N W WASHINGTON, DC 20036-1480	CIVIC ORGANIZATION		1,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 15 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
THE HERITAGE FOUNDATION P O BOX 97057 214 MASSACHUSETTS AVENUE NE WASHINGTON, DC 20002	HISTORIC ORGANIZATION		10,000
BILL OF RIGHTS INSTITUTE 200 N GLEBE ROAD SUITE 200 ARLINGTON, VA 22203	CIVIC ORGANIZATION		2,000.
ACCURACY IN ACADEMIA 4455 CONNECTICUT AVENUE, NW, SUITE 330 WASHINGTON, DC 20008	EDUCATION ORGANIZATION		2,000
EDUCATIONAL OPPORTUNITIES INC 8117 PRESTON ROAD #500 DALLAS, TX 75225	EDUCATION ORGANIZATION		1,000
AMERICAN COUNCIL OF TRUSTEES & ALUMNI 1726 M STREET, NW, SUITE 802 WASHINGTON, DC 20036	EDUCATION ORGANIZATION		2,000
COMMENTARY FUND 165 EAST 56 STREET NEW YORK, NY 10022	RESEARCH ORGANIZATION		10,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 15 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
THE INVESTIGATIVE PROJECT ON TERRORISM FOUNDATION 5505 CONNECTICUT AVE N W , #341 WASHINGTON, DC 20015	CIVIC ORGANIZATION		4,000
GUIDESTAR USA, INC - PHILANTHROPIC RESEARCH 4801 COURTHOUSE STREET, SUITE 220 WILLIAMSBURG, VA 23188	CIVIC ORGANIZATION		499
KIN INTERFAITH FAMILY P O BOX 428 NEWTON, MA 02464	CIVIC ORGANIZATION		10,000
CATO INSTITUTE 1000 MASSACHUSETTS AVE N W WASHINGTON, DC 20036	EDUCATION ORGANIZATION		2,000
INTERCOLLEGIATE STUDIES F M KIRBY CAMPUS, 3901 CENTERVILLE ROAD P O BOX 4431 WILMINGTON, DE 19807-0431	EDUCATION ORGANIZATION		10,000.
ARTHRITIS FOUNDATION, NORTH TEXAS 4300 MACARTHUR, STE 245 DALLAS, TX 75209	MEDICAL RESEARCH ORGAN		1,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 15 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
MANHATTAN INSTITUTE FOR POLICY RESEARCH 52 VANDERBILT AVENUE NEW YORK, NY 10017	RESEARCH ORGANIZATION		1,000
THE AMERICAN SPECTATOR 1611 N KENT STREET, SUITE 901 ARLINGTON, VA 22209	EDUCATION ORGANIZATION		5,000
TEXAS PUBLIC POLICY AUSTIN, TX	CIVIC ORGANIZATION		1,000
NATIONAL ASSOCIATION FOR URBAN DEBATE LEAGUE 332 S MICHIGAN AVENUE, SUITE 500 CHICAGO, IL 60604	CIVIC ORGANIZATION		5,000
EAST DALLAS COMMUNITY SCHOOL 924 WAYNE STREET DALLAS, TX 75223	EDUCATION ORGANIZATION		10,000.
F I R E 601 WALNUT STREET, SUITE 510 PHILADELPHIA, PA 19106	EDUCATION ORGANIZATION		1,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 15 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	AND FOUNDATION STATUS OF RECIPIENT		
BOYS AND GIRLS CLUBS OF AMERICA 4816 WORTH ST DALLAS, TX 75246-1154	EDUCATION ORGANIZATION		1,000
BOY SCOUTS OF AMERICA, CIRCLE 10 COUCIL 8605 HARRY HINES BLVD DALLAS, TX 75235-3014	EDUCATION ORGANIZATION		1,000
MIDDLE EAST MEDIA RESEARCH INSTITUTE 1819 L STREET, NW - 5TH FLOOR WASHINGTON, DC 20036	MEDIA RESEARCH ORGAN.		1,000
SCHWAB CHARITABLE FUND 211 MAIN STREET SAN FRANCISCO, CA 94105	CHARITABLE FUND		320,000.
SOUTHWESTERN MEDICAL FOUNDATION 2305 CEDAR SPRINGS RD #150 DALLAS, TX 75201	MEDICAL RESEARCH ORGAN		100,000
TOTAL CONTRIBUTIONS PAID			1,434,749

SCHEDULE D
(Form 1041)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

► **Attach to Form 1041, Form 5227, or Form 990-T. See the instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).**

OMB No 1545-0092

2009

Name of estate or trust

EDWARD & WILHELMINA ACKERMAN FOUNDATION

Employer identification number

75-2681488

Note: Form 5227 filers need to complete **only** Parts I and II

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a					

b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	167,095.
2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4 Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2008 Capital Loss Carryover Worksheet	4	()
5 Net short-term gain or (loss). Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back	5	167,095.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo, day, yr)	(c) Date sold (mo, day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a					

b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	3,763,791.
7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	
9 Capital gain distributions	9	
10 Gain from Form 4797, Part I	10	
11 Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2008 Capital Loss Carryover Worksheet	11	()
12 Net long-term gain or (loss). Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back	12	3,763,791.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2009

Part III Summary of Parts I and II		(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
Caution: Read the instructions before completing this part				
13	Net short-term gain or (loss)	13		167,095.
14	Net long-term gain or (loss):			
a	Total for year	14a		3,763,791.
b	Unrecaptured section 1250 gain (see line 18 of the wrksh)	14b		
c	28% rate gain	14c		
15	Total net gain or (loss). Combine lines 13 and 14a	15		3,930,886.

Note: If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and do not complete Part IV. If line 15, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

Part IV Capital Loss Limitation

16	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of	16	()
a	The loss on line 15, column (3) or b \$3,000		

Note: If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** on page 7 of the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part only if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

Caution: Skip this part and complete the worksheet on page 8 of the instructions if

- Either line 14b, col (2) or line 14c, col (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero

Form 990-T trusts. Complete this part only if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col (2) or line 14c, col (2) is more than zero.

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34) . . .	17	
18	Enter the smaller of line 14a or 15 in column (2) but not less than zero	18	
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19	
20	Add lines 18 and 19	20	
21	If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0-	21	
22	Subtract line 21 from line 20. If zero or less, enter -0-	22	
23	Subtract line 22 from line 17. If zero or less, enter -0-	23	
24	Enter the smaller of the amount on line 17 or \$2,300	24	
25	Is the amount on line 23 equal to or more than the amount on line 24? <input type="checkbox"/> Yes. Skip lines 25 and 26, go to line 27 and check the "No" box <input type="checkbox"/> No. Enter the amount from line 23	25	
26	Subtract line 25 from line 24	26	
27	Are the amounts on lines 22 and 26 the same? <input type="checkbox"/> Yes. Skip lines 27 thru 30, go to line 31 <input type="checkbox"/> No. Enter the smaller of line 17 or line 22	27	
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)	28	
29	Subtract line 28 from line 27	29	
30	Multiply line 29 by 15% (15)	30	
31	Figure the tax on the amount on line 23. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	31	
32	Add lines 30 and 31	32	
33	Figure the tax on the amount on line 17. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	33	
34	Tax on all taxable income. Enter the smaller of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)	34	

Schedule D (Form 1041) 2009

**Continuation Sheet for Schedule D
(Form 1041)**

▶ See instructions for Schedule D (Form 1041).

▶ **Attach to Schedule D to list additional transactions for lines 1a and 6a.**

OMB No 1545-0092

2009

Name of estate or trust
EDWARD & WILHELMINA ACKERMAN FOUNDATION

Employer identification number
75-2681488

Part I Short-Term Capital Gains and Losses-- Assets Held One Year or Less

[illegible]

1b Total. Combine the amounts in column (f). Enter here and on Schedule D, line 1b		167,095.
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For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D-1 (Form 1041) 2009

Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side

Employer identification number

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 sh 7% preferred of "Z" Co)	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Sales price (see page 4 of the instructions)	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
6a					
192 SH DEVON ENERGY	03/25/1999	01/08/2009	12,626.	2,103.	10,523.
1,170 SH DEVON ENERGY	03/16/2000	01/08/2009	76,941.	21,560.	55,381.
4,680 SH DEVON ENERGY	04/05/2000	01/08/2009	307,765.	83,240.	224,525.
4,676 SH DEVON ENERGY	01/19/2001	01/08/2009	307,502.	90,992.	216,510.
4 SH DEVON ENERGY	01/19/2001	01/08/2009	235.	78.	157.
9,360 SH DEVON ENERGY	12/20/2001	01/23/2009	549,041.	101,560.	447,481.
4,676 SH DEVON ENERGY	01/10/2002	01/23/2009	274,286.	51,206.	223,080.
24,000 SH VALERO ENERGY	05/05/2003	04/06/2009	462,748.	218,100.	244,648.
10,000 SH XTO ENERGY	12/23/2002	04/17/2009	347,118.	9,279.	337,839.
15,276 SH XTO ENERGY	12/23/2002	04/30/2009	525,453.	14,175.	511,278.
1,943 SH XTO ENERGY	12/30/2003	05/08/2009	84,945.	759.	84,186.
6,250 SH XTO ENERGY	11/29/2005	05/08/2009	273,265.	5,799.	267,466.
3,749 SH XTO ENERGY	12/22/2005	05/08/2009	163,923.	3,478.	160,445.
10,000 SH XTO ENERGY	12/17/2007	05/08/2009	412,358.	9,281.	403,077.
1 SH XTO ENERGY	12/22/2005	05/13/2009	38.	1.	37.
4,724 SH XTO ENERGY	12/30/2003	04/30/2009	162,486.	1,846.	160,640.
10,000 SH XTO ENERGY	12/30/2003	05/07/2009	420,425.	3,907.	416,518.
6b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 6b					3,763,791.

Schedule D-1 (Form 1041) 2009

FEDERAL FOOTNOTES

PART VII-A, QUESTION 10:

EDWARD AND WILHELMINA ACKERMAN
5956 SHERRY LANE, SUITE 1600
DALLAS, TX 75225