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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 Jreasury 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 G Check all that apply. Initial return Initial Return of a former public charity Final return Address change Amended return Name change Employer identification number Use the ALVARADO FAMILY FOUNDATION, INC IRS label. 75-3130295 Otherwise. 3100 LAKE MENDOTA DRIVE #905 В Telephone number (see the instructions) print or type. MADISON, WI 53705 608 238-4521 See Specific If exemption application is pending, check here Instructions D 1 Foreign organizations, check here н X Section 501(c)(3) exempt private foundation 2 Foreign organizations meeting the 85% test, check Check type of organization. here and attach computation Other taxable private foundation Section 4947(a)(1) nonexempt charitable trust Ε If private foundation status was terminated Fair market value of all assets at end of year Accounting method. X Cash Accrual under section 507(b)(1)(A), check here (from Part II, column (c), line 16) Other (specify) If the foundation is in a 60-month termination under section 507(b)(1)(B), check here 638,568. (Part I, column (d) must be on cash basis ) Analysis of Revenue and Part I (a) Revenue and (b) Net investment (c) Adjusted net (d) Disbursements Expenses (The total of amounts in expenses per books ıncome ıncome for charitable columns (b), (c), and (d) may not neces-sarily equal the amounts in column (a) purposes (cash basis only) (see the instructions).) Contributions, gifts, grants, etc, received (att sch) 2 Ck ► X if the foundn is not req to att Sch B Interest on savings and temporary 10 10 10 cash investments 11,405 11,405 11,405 Dividends and interest from securities 5a Gross rents b Net rental income or (loss) Statement -7,203 6a Net gain/(loss) from sale of assets not on line 10 REVENU **b** Gross sales price for all assets on line 6a Capital gain net income (from Part IV, line 2) Net short-term capital gain Income modifications 10 a Gross sales less returns and allowances OGOE **b** Less Cost of goods sold c Gross profit/(loss) (att sch) 11 Other income (attach schedule) -732 See Statement 2 -732 -732 Total. Add lines 1 through 11 10,683. 480 10,683 Compensation of officers, directors, trustees, etc 0. 13 14 Other employee salaries and wages 15 Pension plans, employee benefits 16 a Legal fees (attach schedule) 550 550 **b** Accounting fees (attach sch) See St 3 c Other prof fees (attach sch) SCANNED MAY 17 Interest See Stm 4 561 561 Taxes (attach schedule)(see instr.) TRATIVE Depreciation (attach sch) and depletion Occupancy Travel, conferences, and meetings Printing and publications. 23 Other expenses (attach schedule) See Statement 5 329. 329 329 Total operating and administrative 24 329 expenses. Add lines 13 through 23. 1,440 1,440 25 Contributions, gifts, grants paid Stmt 6 <u>27,085</u> 27,085 26 Total expenses and disbursements. 329 1,440 27,085. 28,525 Add lines 24 and 25 Subtract line 26 from line 12: a Excess of revenue over expenses -25,045and disbursements 10,354. **b** Net investment income (if negative, enter 0) 9,243 C Adjusted net income (if negative, enter -0)

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7	5	_	3	1	3	Λ	2	a	5	

Page 3

2-story brick warehouse; or common stock 200 shares MI C Company)				(b) How acquired P — Purchase D — Donation		(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a N/A	•						
b	<del></del>				-		
	<del></del>						· · - · · ·
d							
	Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other bas plus expense of sale			(h) Gain or (e) plus (f) m	
а							
b							
С							
d							
е							
Comple	te only for assets show	ing gain in column (h) and owned by t	he foundation on 12/31/69			(I) Gains (Colu	mn (h)
(i) Fa	air Market Value s of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column over column (j), if ar			gain minus column (k ian -0-) or Losses (fr	), but not less
a			<del> </del>				
b							
с							
d							
e							
2 Capital	gain net income or (net	t capital loss).  [If gain, also If (loss), ent	enter in Part I, line 7 er -0- in Part I, line 7		2		
3 Net sho	ort-term capital gain or (	loss) as defined in sections 1222(5) ai	nd (6):				
ın Part	I, line 8	e 8, column (c) (see the instructions).			3		
Part V	Qualification Unde	r Section 4940(e) for Reduce	d Tax on Net Investme	nt Incor	ne		
If 'Yes,' the fo	oundation does not qual	tion 4942 tax on the distributable amo ify under section 4940(e). Do not com n each column for each year; see the	plete this part.			Yes	X No
1 Enter ti				ny entres.		(4)	
Calenda	(a) se period years ar year (or tax year seginning in)	(b) Adjusted qualifying distributions	<b>(c)</b> Net value of noncharitable-use ass	ets	(col	<b>(d)</b> Distribution umn (b) divided l	
	2008	24,150.	662	2,175.			0.036471
	2007	27,854.	676	,809.			0.041155
	2006	19,960.		3,077.			0.036418
	2005	22,426.	375	706.			0.059690
	2004	14,450.	300	0,085.			0.048153
2 Total o	f line 1, column (d)				2		0.221887
		e 5-year base period — divide the tota has been in existence if less than 5 y			3		0.044377
4 Enter th	ne net value of nonchar	table-use assets for 2009 from Part X,	line 5		4	····	564,289.
5 Multiply	line 4 by line 3				5	_	25,041.
6 Enter 1	% of net investment inc	ome (1% of Part I, line 27b)			6		104.
7 Add line	es 5 and 6				7		25,145.
8 Enter q	ualifying distributions fro	om Part XII, line 4			8		27,085.
Part VI	is equal to or greater thinstructions.	nan line 7, check the box in Part VI, lir	ne 1b, and complete that par	t using a 1	% ta:		000 PE (0000)
BAA						Forn	n <b>990-PF</b> (2009)

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Par		e instruc	tions)		
1	Exempt operating foundations described in section 4940(d)(2), check here	ŀ			
	Date of ruling or determination letter: (attach copy of letter if necessary - see instr.)	1			
1	Domestic foundations that meet the section 4940(e) requirements in Part V,	1			104.
	check here ► X and enter 1% of Part I, line 27b				
•	: 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				_
	foundations only. Others enter -0-)	2			0.
3	Add lines 1 and 2	3			104.
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			<u> 104.</u>
6	Credits/Payments.				
i	2009 estimated tax pmts and 2008 overpayment credited to 2009 6a 235.				
	Exempt foreign organizations – tax withheld at source				
•	: Tax paid with application for extension of time to file (Form 8868)				
•	Backup withholding erroneously withheld	ŀ			
7	Total credits and payments. Add lines 6a through 6d.	7			<u> 235.</u>
8		8			
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed .	9			0.
10		10			131.
_11		11			<u> 131.</u>
Par	t VII-A Statements Regarding Activities		<u> </u>		
1 a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it			Yes	No
	participate or intervene in any political campaign?		1a	ļ	X
ı	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	•	1ь		X
	If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials publish or distributed by the foundation in connection with the activities	hed			
	Did the foundation file Form 1120-POL for this year?		1 c		X
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year				
	(1) On the foundation $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$	0	.		
•	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers $\triangleright$ \$ 0.				
2	<u> </u>		,		х
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		2		<u> </u>
	If 'Yes,' attach a detailed description of the activities.				
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		3		x
4.	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		X
	olf 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?		4b	N	/A
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5	- 14	X
,	If 'Yes,' attach the statement required by General Instruction T.		-		
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:				
Ū	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?	ct	6		X
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	
	Enter the states to which the foundation reports or with which it is registered (see the instructions)		'	- 1	
-	N/A				
t	If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If 'No,' attach explanation		8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942 for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If 'Yes,' complete Part XIV)?	2(j)(5) art XIV	9		Х
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their name	es			
	and addresses.		10		X
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Forn	n 990-PF (2009) ALVARADO FAMILY FOUNDATION, INC	75-313029	5	F	age 5
Par	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		Х
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?		12		х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption Website address	application? .	13	X	
14	The books are in care of FERNANDO L. ALVARADO Telephon  Located at 3100 LAKE MENDOTA DRIVE MADISON WI ZIP + 4	ne no. ► 608 2.	38 4	521	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here		N/A	<b>_</b>	
Dat	and enter the amount of tax-exempt interest received or accrued during the year  † VII-B   Statements Regarding Activities for Which Form 4720 May Be Required	▶ 15			N/A
rai	File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.			Yes	No
1.	a During the year did the foundation (either directly or indirectly).			163	110
1 4	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes X 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			
	(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			
t	o If any answer is 'Yes' to 1a(1)-(6), did <b>any</b> 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 instruction	ons)?	1ь	N	/A
	Organizations relying on a current notice regarding disaster assistance check here.	► []			
(	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)).				
á	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 X No			
	If 'Yes,' list the years ► 20 , 20 , 20				
ŀ	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942 (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(	(a)(2) a)(2) to			
	all years listed, answer 'No' and attach statement — see the instructions.)		2b	N	/A
C	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years h  20 , 20 , 20 , 20	iere.			
32	a Did the foundation hold more than a 2% direct or indirect interest in any business	w			
	enterprise at any time during the year?	Yes X No			
t	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 approve 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	d			
	determine if the foundation had excess business holdings in 2009.)		3ь	N	/A
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		<b>4</b> a		х
t	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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Form 990-PF (2009) ALVARADO FAMILY FO			75-31	30295	Page 6
Part VII-B   Statements Regarding Activit	ies for Which For	m 4720 May Be Red	uired (continued)		
5a During the year did the foundation pay or incui	r any amount to:				
(1) Carry on propaganda, or otherwise attemp	t to influence legislation	n (section 4945(e))?	Yes X	No	
(2) Influence the outcome of any specific publ on, directly or indirectly, any voter registra		4955); or to carry		No	
(3) Provide a grant to an individual for travel,	study, or other sımılar p	ourposes?	Yes X	No	
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	ian a charitable, etc, or 4940(d)(2)? (see instrui	ganization described ctions)	Yes X	No	
(5) Provide for any purpose other than religious educational purposes, or for the prevention	us, charitable, scientific n of cruelty to children o	, literary, or or animals?	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 q a current notice regard	ualify under the exception ing disaster assistance .	ons	5b	N/A
Organizations relying on a current notice regar	ding disaster assistanc	e check here	. ▶ 🗌		
c If the answer is 'Yes' to question 5a(4), does to tax because it maintained expenditure responsing 'Yes,' attach the statement required by Regu	sibility for the grant?		N/A Yes	No	
6a Did the foundation, during the year, receive an on a personal benefit contract?	y funds, directly or indi	rectly, to pay premiums	Yes X	No	
<b>b</b> Did the foundation, during the year, pay premi	ums, directly or indirect	ly, on a personal benefi	t contract?	6b	X
If 'Yes' to 6b, file Form 8870.	ahaa a a-aki ke - · · · ·	bilad law shells (1)	tion? Yes X	No.	
7a At any time during the tax year, was the found				No 7b	N/A
b If yes, did the foundation receive any proceeds Part VIII Information About Officers, D					
and Contractors	irectors, rrustees	, i canaation mana	igors, riigiliy r ulu	Employee	<b>-</b> ,
1 List all officers, directors, trustees, foundation	managers and their co	mpensation (see instru	ctions).		
(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 other allow	account, wances
FERNANDO L. ALVARADO	President/Tr	0.	0.		0.
3100 LAKE MENDOTA DRIVE MADISON, WI 53705	0				
CARLA ALVARADO	VP/SECRETARY	0.	0.		0.
3100 LAKE MENDOTA DRIVE MADISON, WI 53705	0				
CHRISTOPHER BUGG	Director	0.	0.		0.
1917 VILAS AVENUE	0	•	<b>.</b>		٠.
MADISON, WI 53711					
2 Compensation of five highest-paid employees	Other than those inclu	ided on line 1— see inst	ructions). If none, enter	· 'NONE.'	
(a) Name and address of each employee	(b) Title and average	(c) Compensation	(d) Contributions to	(e) Expense	account.
paid more than \$50,000	hours per week devoted to position	(c) component	employee benefit plans and deferred compensation	other allow	vances
None					
Total number of other employees paid over \$50,000	TEE ADROES OF	07/06/09	<u> </u>	Form 990-	PF (2009)

75-3130295

Par	Minimum Investment Return (All domestic foundations must complete this part. F see instructions.)	oreig	n foundations,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes.		
	Average monthly fair market value of securities	1a	536,062.
	Average of monthly cash balances	1ь	36,820.
•	Fair market value of all other assets (see instructions)	1 c	
C	l Total (add lines 1a, b, and c)	1 d	572,882.
•	Reduction claimed for blockage or other factors reported on lines 1a and 1c		
	(attach detailed explanation) . 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	572,882.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	8,593.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	564,289.
6	Minimum investment return. Enter 5% of line 5	6	28,214.
Par	t XI Distributable Amount (see instructions) (Section 4942(J)(3) and (J)(5) private oper and certain foreign organizations check here ► □ and do not complete this page		foundations
1	Minimum investment return from Part X, line 6	1	28,214.
2a	Tax on investment income for 2009 from Part VI, line 5		
b	Income tax for 2009. (This does not include the tax from Part VI.)		
c	Add lines 2a and 2b	2c	104.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	28,110.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	28,110.
6	Deduction from distributable amount (see instructions)	6	· · · · · · · · · · · · · · · · · · ·
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	28,110.
Par	Qualifying Distributions (see instructions)	- 1	
	Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes. Expenses, contributions, gifts, etc – total from Part I, column (d), line 26	1a	27,085.
b	Program-related investments – total from Part IX-B	1ь	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2	
3 a	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)	3Ь	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	27,085.
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	104.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	26,981.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether qualifies for the section 4940(e) reduction of tax in those years.	er the f	
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# Part XIII Undistributed Income (see instructions)

	<b>(a)</b> Corpus	(b) Years prior to 2008	<b>(c)</b> 2008	<b>(d)</b> 2009
Distributable amount for 2009 from Part XI,				28,110.
line 7  2 Undistributed income, if any, as of the end of 2009:				20,110.
a Enter amount for 2008 only			21,521.	
<b>b</b> Total for prior years: 20 , 20 , 20 , 20	·	0.	21,321.	
3 Excess distributions carryover, if any, to 2009		- 0.		
a From 2004				
<b>b</b> From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part				
XII, line 4 ► \$ 27,085.				
a Applied to 2008, but not more than line 2a			21,521.	
<b>b</b> Applied to undistributed income of prior years			, , , , , , , , , , , , , , , , , , , ,	
(Élection required – see instructions)		0.		······································
c Treated as distributions out of corpus (Election required – see instructions)	0.			
d Applied to 2009 distributable amount				5,564.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009.	0.			0.
(If an amount appears ın column (d), the same amount must be shown ın column (a).)				
Same amount must be shown in column (ay.)				
6 Enter the net total of each column as				
indicated below:				
a Corpus. Add lines 3f, 4c, and 4e Subtract line 5	0.			
<b>b</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		0.		
d Subtract line 6c from line 6b. Taxable				
amount — see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from			0.	
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				22,546.
7 Amounts treated as distributions out of				22,340.
corpus to satisfy requirements imposed				
by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
·	U.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2010.				
Subtract lines 7 and 8 from line 6a	0.			<del></del>
10 Analysis of line 9.			#	
a Excess from 2005				
b Excess from 2006				
c Excess from 2007			#	
d Excess from 2008			#	
e Excess from 2009				

Form 990-PF (2009) ALVARADO FAMILY Part XIV Private Operating Foundati			VII-A question	75-3130295	Page 10 N/A
1a If the foundation has received a ruling or or is effective for 2009, enter the date of the	letermination letter				
<b>b</b> Check box to indicate whether the foundat	=	rating foundation de	scribed in section	4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum investment return from Part X for each year listed	(a) 2009	<b>(b)</b> 2008	(c) 2007	(d) 2006	(e) Total
<b>b</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					
<ul> <li>Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c</li> </ul>					
3 Complete 3a, b, or c for the alternative test relied upon					
a 'Assets' alternative test — enter.					
(1) Value of all assets.				ļ	
(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.					
<ol> <li>Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)</li> </ol>					
(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		<u> </u>			·
Part XV Supplementary Information			organization h	ıad \$5,000 or mo	re in
assets at any time during the state of the foundation Manager a List any managers of the foundation who had close of any tax year (but only if they have see Statement 10	ers:	<del>-</del>	otal contributions re section 507(d)(2).)	ceived by the foundat	tion before the
<b>b</b> List any managers of the foundation who o a partnership or other entity) of which the f None	wn 10% or more of oundation has a 10	the stock of a corp 0% or greater interes	oration (or an equal st.	ly large portion of the	ownership of
2 Information Regarding Contribution, Gram Check here   X   if the foundation only makes complete items 2a, b, c, and d.	akes contributions gifts, grants, etc,	to preselected char- (see instructions) to	itable organizations individuals or orga	nizations under other	
a The name, address, and telephone numbe	r of the person to w	vhom applications sl	nould be addressed	•	
<b>b</b> The form in which applications should be s	ubmitted and inform	mation and materials	s they should includ	e·	
c Any submission deadlines.					
d Any restrictions or limitations on awards, s	uch as by geograph	nical areas, charitab	le fields, kinds of in	stitutions, or other fa	ctors
RAA		EA03101 07/06/00			orm <b>990-PE</b> (2009)

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	1	Amount			
Name and address (home or business)	substantial contributor	recipient	Contribution				
a Paid during the year							
	:						
		:					
			}				
Total	<u> </u>		► 3a				
<b>b</b> Approved for future payment							
Total	<u> </u>		► 3b				
IVIAI			- 50				

Inter gross amounts unless otherwise indicated.	Unrelated I	ousiness income	Excluded by	section 512, 513, or 514	
Program service revenue:	(a) Business code	<b>(b)</b> Amount	(c) Exclu- sion code	(d) Amount	(e) Related or exempt function income (see the instructions)
a					
b					
С					
d					
e					
f					
${f g}$ Fees and contracts from government agencies .					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					10.
4 Dividends and interest from securities			_[		11,405.
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
<b>b</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					-7,203
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory		·			
11 Other revenue:			<u> </u>		
a BUCKEYE PARTNERS					
b ENERGY TRANSFER PARTNERS	<u> </u>				48.
c ENERGY TRANSFER PARTNERS					-780.
d KINDER MORGAN		·			
e					
12 Subtotal Add columns (b), (d), and (e)					3,480.
13 Total. Add line 12, columns (b), (d), and (e)				13	3,480.
See worksheet in the instructions for line 13 to verify cal	culations.)				
Part XVI-B Relationship of Activities to the	Accomplish	ment of Exemp	ot Purpose	es	
Line No. Explain below how each activity for which inc		· · · · · · · · · · · · · · · · · · ·			

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)
N/A	
<del></del>	

(608) 231-1322

Form 990-PF (2009)

Phone no

Page 13 Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations** Yes No Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? a Transfers from the reporting foundation to a noncharitable exempt organization of. (1) Cash 1a(1) (2) Other assets 1a(2) **b** Other transactions. 16(1) (1) Sales of assets to a noncharitable exempt organization 1b(2) (2) Purchases of assets from a noncharitable exempt organization. (3) Rental of facilities, equipment, or other assets. 1b(3) (4) Reimbursement arrangements 1b(4) 1 b (5) (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations 1b(6) c Sharing of facilities, equipment, mailing lists, other assets, or paid employees. 1 c d if the answer to any of the above is 'Yes,' complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements (a) Line no (b) Amount involved N/A 2a is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations X No described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? | Yes b If 'Yes,' complete the following schedule. (c) Description of relationship (a) Name of organization (b) Type of organization N/A that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge Title Date Signature of officer or trusk Date Preparer's Identifying number Preparer's signature Check if (See Signature in the instrs) Paid N/A employed Preparer's Use Stotlar & Stotlar, N/A Firm's name (or yours if self employed), address, and FIN 702 N. Blackhawk Avenue Only

TEEA0503L 07/06/09

Madison,

ZIP code

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53705

#### **Federal Statements**

Page 1

**ALVARADO FAMILY FOUNDATION, INC** 

75-3130295

Statement 1 Form 990-PF, Part I, Line 6a Net Gain (Loss) from Noninventory Sales Per Books Assets Not Included in Part IV

Description:

100 BOSTON PPTYS INC

Date Acquired: How Acquired: Date Sold:

10/11/2002 Purchase 2/17/2009

To Whom Sold:

Gross Sales Price: Cost or Other Basis: 3,750. 3,945.

Basis Method:

Cost

Gain (Loss)

-195.

Description:

100 PHILIP MORRIS COS INC

Date Acquired: How Acquired: Date Sold:

1/16/2003 Purchase 2/17/2009

To Whom Sold:

Gross Sales Price: Cost or Other Basis: 1,549. 968.

Basis Method:

Cost

Gain (Loss)

581.

100 COVANCE Description: 1/23/2006 Date Acquired: How Acquired: Purchase Date Sold: 2/17/2009

To Whom Sold:

Gross Sales Price: Cost or Other Basis: 4,080. 5,203.

Basis Method:

Cost

Gain (Loss)

-1,123.

Description: 100 CISCO SYSTEMS

Date Acquired: How Acquired: Date Sold: To Whom Sold:

10/17/2002 Purchase 2/17/2009

Gross Sales Price: Cost or Other Basis: 1,530. 1,017.

Basis Method:

Cost

Gain (Loss)

513.

Description: 100 AVALONBAY COMMUNITIES 12/02/2004

Date Acquired: How Acquired: Date Sold: To Whom Sold:

Purchase 2/17/2009

Gross Sales Price: Cost or Other Basis: 4,210. 5,821.

Basis Method:

Cost

Gain (Loss)

-1,611.

## **Federal Statements**

Page 2

**ALVARADO FAMILY FOUNDATION, INC** 

75-3130295

Statement 1 (continued) Form 990-PF, Part I, Line 6a Net Gain (Loss) from Noninventory Sales Per Books Assets Not Included in Part IV

Description:

3 AVALONBAY COMMUNITIES

Date Acquired: How Acquired:

2/04/2009 Purchase 2/17/2009

Date Sold: To Whom Sold:

Gross Sales Price: Cost or Other Basis: 126. 159.

Basis Method:

Cost

Gain (Loss)

-33.

Description:

100 ANADARKO PETR CORP

Date Acquired: 5/03/2005 How Acquired: Purchase Date Sold: 2/17/2009

To Whom Sold:

Gross Sales Price: Cost or Other Basis: 3,624. 3,599.

Basis Method: Cost

Gain (Loss)

25.

69 KRAFT FOODS Description: 4/02/2007 Date Acquired: How Acquired: Purchase 2/18/2009 Date Sold:

To Whom Sold:

Basis Method:

Gross Sales Price: Cost or Other Basis: 1,654. 993.

Cost

Gain (Loss)

661.

300 WEINGARTEN RLTY INVS Description:

Date Acquired: 3/30/2004 How Acquired: Purchase Date Sold: 2/18/2009

To Whom Sold:

3,736. Gross Sales Price: Cost or Other Basis: 9,077. Cost

Basis Method:

Gain (Loss)

-5,341.

200 VIROPHARMA INC Description:

Date Acquired: 7/11/2006 How Acquired: Purchase Date Sold: 2/18/2009

To Whom Sold:

Gross Sales Price: 1,167. Cost or Other Basis: 1,702.

Basis Method:

Cost

Gain (Loss)

-535.

## **Federal Statements**

Page 3

#### **ALVARADO FAMILY FOUNDATION, INC**

75-3130295

Statement 1 (continued)
Form 990-PF, Part I, Line 6a
Net Gain (Loss) from Noninventory Sales Per Books
Assets Not Included in Part IV

Description:

2000 VALENCE TECHNOLOGY 3/23/2007

Date Acquired: How Acquired: Date Sold:

Purchase 2/18/2009

To Whom Sold:

Gross Sales Price: Cost or Other Basis: 3,834. 2,610.

Basis Method:

Cost

Gain (Loss)

1,224.

Description:
Date Acquired:
How Acquired:

100 3M 1/28/2002 Purchase 2/18/2009

To Whom Sold:

Date Sold:

Gross Sales Price: Cost or Other Basis: 4,707. 4,930.

Basis Method: Cost

Gain (Loss)

-223.

Description:

100 HENRY SCHEIN

Date Acquired: How Acquired: Date Sold:

9/18/2003 Purchase 2/18/2009

To Whom Sold:

Gross Sales Price: Cost or Other Basis: 3,663. 2,949.

100 PHILIP MORRIS INTL

Basis Method:

Cost

Gain (Loss)

714.

Description:

Date Acquired: 12/17/2007 How Acquired: Purchase Date Sold: 2/18/2009

To Whom Sold:

Gross Sales Price: 3,520.
Cost or Other Basis: 2,204.

Basis Method:

Cost

Gain (Loss)

1,316.

Description:

100 HEALTH CARE REIT 9/02/2003

Date Acquired:
How Acquired:
Date Sold:
To Whom Sold:

Purchase 2/18/2009

Gross Sales Price: Cost or Other Basis: 3,104. 3,001.

Basis Method: Cost

Gain (Loss)

103.

20	Λ	0
ZU	U	y

## **Federal Statements**

Page 4

#### **ALVARADO FAMILY FOUNDATION, INC**

75-3130295

Statement 1 (continued)
Form 990-PF, Part I, Line 6a
Net Gain (Loss) from Noninventory Sales Per Books
Assets Not Included in Part IV

Description:

200 GENERAL GROWTH PPTYS INC

Date Acquired: How Acquired:

12/02/2004 Purchase 2/18/2009

Date Sold: To Whom Sold:

Gross Sales Price: Cost or Other Basis: 105. 5,577.

Basis Method:

Cost

Gain (Loss)

-5,472.

Description:

200 ENERPLUS RES FD TR

Date Acquired: How Acquired: Date Sold: 12/07/2004 Purchase 2/18/2009

To Whom Sold:

Gross Sales Price: Cost or Other Basis: 3,477. 6,734.

Basis Method: Cost

Gain (Loss)

-3,257.

Description:

50 EDWARDS LIFESCIENCES CORP

Date Acquired: How Acquired: Date Sold: 12/29/2004 Purchase 2/18/2009

To Whom Sold: Gross Sales Price:

3,052. 2,100.

Cost or Other Basis: Basis Method:

Cost

Gain (Loss)

952.

Description:

150 METAVANTE TECHNOLOGIES INC

Date Acquired: How Acquired: Date Sold: To Whom Sold: 11/02/2007 Purchase 2/18/2009

Gross Sales Price: Cost or Other Basis: 2,520. 164.

Basis Method:

Cost

Gain (Loss)

2,356.

Description:

450 MARSHALL & ILSLEY

Date Acquired: How Acquired: Date Sold: 1/01/1980 Purchase 2/18/2009

To Whom Sold: Gross Sales Price:

1,674. 634.

Cost or Other Basis: Basis Method:

Cost

Gain (Loss)

1,040.

# **Federal Statements**

Page 5

#### **ALVARADO FAMILY FOUNDATION, INC**

75-3130295

Statement 1 (continued)
Form 990-PF, Part I, Line 6a
Net Gain (Loss) from Noninventory Sales Per Books
Assets Not Included in Part IV

Description:

100 INTEGRYS ENERGY

Date Acquired: How Acquired: Date Sold: 6/27/2003 Purchase 2/18/2009

To Whom Sold:

Gross Sales Price: Cost or Other Basis: 3,922. 4,166.

Basis Method:

Cost

Gain (Loss)

-244.

Description:

300 ALLIANT ENERGY

Date Acquired: How Acquired: Date Sold: 12/12/2003 Purchase 12/02/2009

To Whom Sold:

Gross Sales Price: Cost or Other Basis: 8,455. 7,412.

Basis Method:

Cost

Gain (Loss)

1,043.

Description:

200 UNIVERSAL HEALTH RLTY INCOME 12/31/2003

Date Acquired: How Acquired: Date Sold:

Purchase 12/02/2009

To Whom Sold: Gross Sales Price: 5,961. 5,753.

Cost or Other Basis: Basis Method:

Cost

Gain (Loss)

208.

Description:

150 PUBLIC STORAGE INC 12/05/2003

Date Acquired: How Acquired: Date Sold:

Purchase 12/02/2009

To Whom Sold: Gross Sales Price:

11,931. 6,698.

Cost or Other Basis: Basis Method:

Cost

Gain (Loss)

5,233.

Description:

400 POWERSHARES 5/10/2007

Date Acquired: How Acquired: Date Sold: To Whom Sold:

Purchase 12/02/2009

Gross Sales Price: Cost or Other Basis: 4,134. 7,776.

Basis Method:

Cost

Gain (Loss)

-3,642.

## **Federal Statements**

Page 6

**ALVARADO FAMILY FOUNDATION, INC** 

75-3130295

-3,821.

Statement 1 (continued) Form 990-PF, Part I, Line 6a Net Gain (Loss) from Noninventory Sales Per Books Assets Not Included in Part IV

Description:

Date Acquired: How Acquired:

Date Sold: To Whom Sold:

Gross Sales Price: Cost or Other Basis:

Basis Method:

350 POWERSHARES 7/26/2007

Purchase 12/02/2009

> 3,617. 7,438.

Cost

200 EQUITABLE RES INC 10/13/2004 Purchase 12/02/2009

How Acquired: Date Sold: To Whom Sold:

Date Acquired:

Description:

Gross Sales Price:

Cost or Other Basis: Basis Method:

Cost

8,290.

5,482.

Gain (Loss)

Gain (Loss)

2,808.

Description:

121.602 US GLOBAL REGION EAST EUROPEAN 9/14/2005 Date Acquired: How Acquired: Purchase 12/02/2009 Date Sold:

To Whom Sold:

Gross Sales Price: Cost or Other Basis: 1,089. 4,780.

Basis Method:

Cost

Gain (Loss)

-3,691.

Description:

15.503 US GLOBAL REGION EAST EUROPEAN Date Acquired: 12/23/2005 How Acquired: Purchase Date Sold: 12/02/2009

To Whom Sold:

Gross Sales Price: Cost or Other Basis:

Basis Method:

Cost

139. 611.

Gain (Loss)

-472.

Description:

8.156 US GLOBAL REGION EAST EUROPEAN Date Acquired: 12/23/2005 How Acquired: Purchase 12/02/2009

Date Sold: To Whom Sold:

Basis Method:

Gross Sales Price: Cost or Other Basis:

Cost

73. 321.

Gain (Loss)

-248.

## **Federal Statements**

Page

#### **ALVARADO FAMILY FOUNDATION, INC**

75-3130295

Statement 1 (continued) Form 990-PF, Part I, Line 6a Net Gain (Loss) from Noninventory Sales Per Books Assets Not Included in Part IV

Description:

21.705 US GLOBAL REGION EAST EUROPEAN

Date Acquired: How Acquired:

12/22/2006 Purchase 12/02/2009

Date Sold: To Whom Sold:

Gross Sales Price: Cost or Other Basis: 194. 968.

Basis Method:

Cost

Gain (Loss)

-774.

Description:

15.504 US GLOBAL REGION EAST EUROPEAN

Date Acquired: 12/22/2006 How Acquired: Purchase Date Sold: 12/02/2009

To Whom Sold:

Gross Sales Price: Cost or Other Basis: 139. 691.

Basis Method: Cost

Gain (Loss)

-552.

Description:

5.508 US GLOBAL REGION EAST EUROPEAN

Date Acquired: 12/22/2006 How Acquired: Purchase 12/02/2009 Date Sold:

To Whom Sold:

49. Gross Sales Price: Cost or Other Basis: 246. Cost

Basis Method:

8.03 US GLOBAL REGION EAST EUROPEAN

Description: Date Acquired: 12/20/2007 How Acquired: Purchase Date Sold: 12/02/2009

To Whom Sold:

Gross Sales Price: 72. Cost or Other Basis: 393.

Basis Method:

Cost

Gain (Loss)

Gain (Loss)

-321.

-197.

Description:

31.761 US GLOBAL REGION EAST EUROPEAN

Date Acquired: 12/20/2007 How Acquired: Purchase Date Sold: 12/02/2009

To Whom Sold:

Gross Sales Price: 284. Cost or Other Basis: 1,555.

Basis Method:

Cost

Gain (Loss)

-1,271.

#### **Federal Statements**

Page 8

#### **ALVARADO FAMILY FOUNDATION, INC**

75-3130295

Statement 1 (continued)
Form 990-PF, Part I, Line 6a
Net Gain (Loss) from Noninventory Sales Per Books Assets Not Included in Part IV

Description:

455.538 US GLOBAL REGION EAST EUROPEAN

Date Acquired: How Acquired:

5/23/2008 Purchase 12/02/2009

Date Sold: To Whom Sold:

Gross Sales Price:

4,079. 0.

Cost or Other Basis: Basis Method:

Cost

Gain (Loss)

4,079.

Description:

100 FIRST SOLAR INC

Date Acquired: How Acquired:

8/15/2007 Purchase

Date Sold:

12/02/2009

To Whom Sold:

Gross Sales Price: Cost or Other Basis:

12,074.

9,110.

Basis Method:

Cost

Gain (Loss)

2,964.

Total \$ -7,203.

(c)

Statement 2 Form 990-PF, Part I, Line 11 Other Income

> (b) Net (a) Investment Revenue Adjusted per Books Income Net Income Ś 48.\$ 48. \$

ENERGY TRANSFER PARTNERS **ENERGY TRANSFER PARTNERS** 

48. -78<u>0.</u> -780. -780. -732.\$ Total ₹

Statement 3 Form 990-PF, Part I, Line 16b Accounting Fees

(b) Net (d) (a) (c) Expenses Investment Adjusted Charitable per Books Income Net Income Purposes 550. TAX PREPARATION 550. Total \$ 550.

2009	Fe	deral Staten	nents		Pag
ALVARADO FAMILY FOUNDATION, INC				75-3130	
Statement 4 Form 990-PF, Part I, Line 18 Taxes					
FEDERAL TAX	Total	(a) Expenses per Books \$ 561. \$ 561.	(b) Net Investment Income	(c) Adjusted Net Income \$ 561 \$ 561	
Statement 5 Form 990-PF, Part I, Line 23 Other Expenses					
FEES	Total	(a) Expenses per Books \$ 329. \$ 329.	(b) Net Investment Income \$ 329.	(c) Adjusted Net Income \$ 329 \$ 329	•
Statement 6 Form 990-PF, Part I, Line 25 Contributions, Gifts, and Grant Cash Grants and Allocation					
Class of Activity: Donee's Name: Donee's Address: Relationship of Donee:		3330 ATWOOD MADISON, WI NONE	ANICAL SOCIE	ГҮ	
	ponee:	NON PROFIT			ė 100
Organizational Status of Amount Given:		DIDITO METE	UTCTON		\$ 100
		PUBLIC TELE WHA-TV FRIE 821 UNIVERS MADISON WI	NDS ITY AVENUE		\$ 100
Amount Given: Class of Activity: Donee's Name:	Donee:	WHA-TV FRIE	NDS ITY AVENUE		100
Amount Given:  Class of Activity: Donee's Name: Donee's Address:  Relationship of Donee: Organizational Status of	Donee:	WHA-TV FRIE 821 UNIVERS MADISON, WI NONE NON PROFIT	NDS ITY AVENUE 53706 E:REPRODUCTIO	ON	

Class of Activity: Donee's Name: Donee's Address:

NON PROFIT FMPS SHELLEY GLOVER FUND

MADISON, WI NONE

Relationship of Donee: Organizational Status of Donee:

2009 Fe	ederal Statements	Page 10	
` ALVARA	DO FAMILY FOUNDATION, INC	75-3130295	
Statement 6 (continued) Form 990-PF, Part I, Line 25 Contributions, Gifts, and Grants	`		
Amount Given:	\$	100.	
Class of Activity: Donee's Name: Donee's Address:	VARIOUS CHARITABLE ACTIVI UNITED WAY 2059 ATWOOD AVENUE MADISON, WI		
Relationship of Donee: Organizational Status of Donee: Amount Given:	NONE	12,000.	
Class of Activity: Donee's Name: Donee's Address:	EDUCATION/MUSIC MADISON OPERA 3414 MONROE STREET		
Relationship of Donee: Organizational Status of Donee: Amount Given:	MADISON, WI NONE NON PROFIT	1,350.	
Class of Activity: Donee's Name: Donee's Address:	ART EDUCATION MADISON MUSEUM OF CONT ART 227 STATE STREET MADISON, WI		
Relationship of Donee: Organizational Status of Donee: Amount Given:	NONE	250.	
Class of Activity: Donee's Name: Donee's Address:	ENVIRONMENTAL PRESERVATIO FRIENDS OF THE LAKESHORE		
Relationship of Donee: Organizational Status of Donee: Amount Given:	MADISON, WI NONE NON PROFIT	150.	
Class of Activity: Donee's Name: Donee's Address:	EDUCATION/MUSIC MADISON SYMPHONY ORCHESTRA 222 W. WASHINGTON AVENUE, SUITE 460 MADISON, WI		
Relationship of Donee: Organizational Status of Donee: Amount Given:	NONE NON PROFIT	1,250.	
Class of Activity: Donee's Name: Donee's Address:	ENVIRONMENTAL PRESERVATIO THE NATURE CONSERVANCY 4245 NORTH FAIRFAX DRIVE		

4245 NORTH FAIRFAX DRIVE ARLINGTON, VA 22203

NONE NON PROFIT

Relationship of Donee: Organizational Status of Donee: Amount Given:

3,000.

Class of Activity: Donee's Name: Donee's Address:

COMMUNITY SERVICE
MADISON COMMUNITY FOUNDATION
2 SCIENCE COURT
MADISON, WI 53705

Relationship of Donee: NONE
Organizational Status of Donee: NON PROFIT

2009 F	ederal Statements		Page 11	
ALVARA	DO FAMILY FOUNDATION, INC	_	75-3130295	
Statement 6 (continued) Form 990-PF, Part I, Line 25 Contributions, Gifts, and Grants				
Amount Given:		\$	250.	
Class of Activity: Donee's Name: Donee's Address:	EDUCATION, MUSIC OPERA FOR THE YOUNG 6441 ENTERPRISE LANE MADISON, WI			
Relationship of Donee: Organizational Status of Donee: Amount Given:	NONE		50.	
Class of Activity: Donee's Name: Donee's Address:	EDUCATION, MUSIC BACH DANCING & DYNAMITE PO BOX 2348			
Relationship of Donee: Organizational Status of Donee: Amount Given:	MADISON, WI NONE		100.	
Class of Activity: Donee's Name: Donee's Address:	PET COMPANIONS HAWAII ISLAND HUMANE SOCIETY 74-5225 QUEEN KAAHUMANU HWY KALUA KONA, HI 96740			
Relationship of Donee: Organizational Status of Donee: Amount Given:	NONE NON PROFIT		100.	
Class of Activity: Donee's Name: Donee's Address:	CONSERVATION HAWAII TROPICAL BOTANICAL 27-717 OLD MANALOHOA HWY PAPAIKOU, HI			
Relationship of Donee: Organizational Status of Donee: Amount Given:	NONE NON PROFIT		100.	
Class of Activity: Donee's Name: Donee's Address:	EDUCATION UW PLATTEVILLE FOUNDATION ULSVIK HALL PLATTEVILLE, WI			
Relationship of Donee: Organizational Status of Donee: Amount Given:	NONE NON PROFIT		100.	
Class of Activity: Donee's Name: Donee's Address:	MADISON FRIENDS OF AIRE			
Deletional Co.	YOME			

NON PROFIT

Class of Activity: Donee's Name: Donee's Address:

100.

NONE

Relationship of Donee: Organizational Status of Donee:

Relationship of Donee: Organizational Status of Donee: NONE

Amount Given:

SUPPORT OVERTURE CTR 201 STATE STREET FOUNDATION 201 STATE STREET MADISON, WI

NON PROFIT

## **Federal Statements**

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#### **ALVARADO FAMILY FOUNDATION, INC**

75-3130295

2,000.

1,200.

85.

100.

Statement 6 (continued) Form 990-PF, Part I, Line 25 Contributions, Gifts, and Grants

Amount Given:

1,000. Ś

Class of Activity: Donee's Name:

Donee's Address:

Relationship of Donee: Organizational Status of Donee:

Amount Given:

Class of Activity: Donee's Name:

Donee's Address:

Relationship of Donee: Organizational Status of Donee:

Amount Given:

HEALTH RESEARCH

MUSCULAR DYSTROPHY OF WISCONSIN

3300 EAST SUNRISE DRIVE

TUCSON, AZ 85718

NON PROFIT

Class of Activity: Donee's Name:

Donee's Address:

Relationship of Donee: Organizational Status of Donee:

Amount Given:

Class of Activity: Donee's Name: Donee's Address:

Relationship of Donee: Organizational Status of Donee:

Amount Given:

Class of Activity: Donee's Name:

Donee's Address:

Relationship of Donee:

Amount Given:

Organizational Status of Donee:

Class of Activity:

Donee's Name: Donee's Address:

Relationship of Donee:

Organizational Status of Donee:

Amount Given:

COMMUNITY SERVICE

YMCA MADISON

8001 EXCELSIOR DRIVE MADISON, WI 53717

NONE

NON PROFIT

NONE

100.

NAMI

4233 W, BELTLINE HWY MADISON, WI 53711

NONE

NON PROFIT

EDUCATION BISHOP MUSEUM 1525 BERNICE STREET

HONOLULU, HI

NONE

NON PROFIT

REAP

NONE

NON PROFIT

COMMUNITY SERVICE FAMILY SUPPORT SERVICES

NONE

NON PROFIT

Total \$

500.

27,085.

# **Federal Statements**

Page 13

**ALVARADO FAMILY FOUNDATION, INC** 

75-3130295

Statement 7 Form 990-PF, Part II, Line 10b Investments - Corporate Stocks

Corporate Stocks	Valuation	Book	Fair Market	
	<u>Method</u>	Value	Value	
ENERGY TRANSFER PARTNERSHIP LP STRYKER CORP 160 SHARES SECTOR SPDR TR 500 SHARES EXXON MOBIL INC 200 SHARES ISHARES TR FTSE XINHUA HK CHINA SOCIEDAD QUIMICA MINERA DE CHILE 500 SHA VANGUARD SSECTOR INDEX FDS	Cost Cost Cost Cost Cost Cost Cost	\$ 14,150. 16,677. 26,877. 11,314. 5,687. 6,894. 12,661. \$ 94,260.	\$ 22,485. 18,133. 28,505. 13,638. 12,678. 18,785. 12,505. \$ 126,729.	

Statement 8 Form 990-PF, Part II, Line 13 Investments - Other

	Valuation <u>Method</u>	 Book Value	Fair Market Value	
DISCOVER BANK OF GREENWOOD CD Other Publicly Traded Securities	Cost -	\$ 0.	\$	0.
EUROPACIFIC GROWTH FUND1996.028 SHARES FIRST EAGLE GLOBAL2585.921 SHARES NEW WORLD FUND CLASS 1575.399 SHARES RYDEX WEAKENING DR FUND 595.801 SHARES VANGUARD SMALL CAP VALUE INDEX 1.409.603 VANGUARD 500 INDEX 373.097 SHARES VANGUARD INDEX SMALL CAP GROWTH AMERICAN CAPITAL WORLD GROWTH & INC AMERICAN WASHINGTON MUTUAL INVESTORS FIRST AMERICAN GL INFRASTRUCTURE FRANKLIN HIGH INCOME VANGUARD INFLATION PROTECTED SECS VANGUARD INDEX FDS	Cost Cost Cost Cost Cost Cost Cost Cost	78,236. 107,854. 62,039. 14,050. 17,236. 39,239. 15,413. 20,146. 15,443. 20,318. 27,071. 25,427. 20,538.		75,588. 102,902. 72,926. 11,553. 18,409. 38,306. 18,614. 15,276. 20,501. 28,325. 34,505. 24,518. 17,896.
	Total	\$ 463,010.	\$	479,319.

Statement 9 Form 990-PF, Part III, Line 3 Other Increases

DIFFERENCE IN FMV OF CONTRIBUTIONS

Total \$ 1,784.

# **Federal Statements**

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**ALVARADO FAMILY FOUNDATION, INC** 

75-3130295

Statement 10 Form 990-PF, Part XV, Line 1a Foundation Managers - 2% or More Contributors

FERNANDO L. ALVARADO CARLA ALVARADO