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

OMB No 1545-0052

**2009**Department of the Treasury  
Internal Revenue Service

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

**For 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  
☐ Amended return ☐ Address change ☐ Name change

|                                                                                                                                                                                                                                                         |                                                                                                                        |  |                                                                                                                                                                                   |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|--|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use the IRS label. Otherwise, print or type. See Specific Instructions.                                                                                                                                                                                 | <b>Michael &amp; Ina Korek Foundation</b><br>c/o Foundation Source<br>501 Silverside Road #123<br>Wilmington, DE 19809 |  | <b>A</b> Employer identification number<br>77-6140213                                                                                                                             |
|                                                                                                                                                                                                                                                         |                                                                                                                        |  | <b>B</b> Telephone number (see the instructions)<br>800-839-1754                                                                                                                  |
|                                                                                                                                                                                                                                                         |                                                                                                                        |  | <b>C</b> If exemption application is pending, check here <input type="checkbox"/>                                                                                                 |
|                                                                                                                                                                                                                                                         |                                                                                                                        |  | <b>D</b> 1 Foreign organizations, check here <input type="checkbox"/><br>2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> |
| <b>H</b> Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation<br><input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation |                                                                                                                        |  | <b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>                                                              |
| <b>I</b> Fair market value of all assets at end of year (from Part II, column (c), line 16)<br>\$ 876,519.                                                                                                                                              |                                                                                                                        |  | <b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>                                                           |
| <b>J</b> Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual<br><input type="checkbox"/> Other (specify) _____<br>(Part I, column (d) must be on cash basis)                                                   |                                                                                                                        |  |                                                                                                                                                                                   |

| <b>Part I Analysis of Revenue and Expenses</b> (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions)) |                                                                                | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |         |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|------------------------------------|---------------------------|-------------------------|-------------------------------------------------------------|---------|
| <b>REVENUE</b>                                                                                                                                                                | <b>1</b> Contributions, gifts, grants, etc., received (att sch)                | 97,700.                            |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>2</b> Ck <input type="checkbox"/> if the foundn is not req to att Sch B     |                                    |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>3</b> Interest on savings and temporary cash investments                    |                                    |                           | N/A                     |                                                             |         |
|                                                                                                                                                                               | <b>4</b> Dividends and interest from securities                                | 26,372.                            | 12,448.                   |                         |                                                             |         |
|                                                                                                                                                                               | <b>5a</b> Gross rents                                                          |                                    |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>b</b> Net rental income or (loss)                                           |                                    |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>6a</b> Net gain/(loss) from sale of assets not on line 10                   | 14,946.                            |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>b</b> Gross sales price for all assets on line 6a                           | 296,845.                           |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>7</b> Capital gain net income (from Part IV, line 2)                        |                                    | 14,946.                   |                         |                                                             |         |
|                                                                                                                                                                               | <b>8</b> Net short-term capital gain                                           |                                    |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>9</b> Income modifications                                                  |                                    |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>10a</b> Gross sales less returns and allowances                             |                                    |                           |                         |                                                             |         |
| <b>b</b> Less: Cost of goods sold                                                                                                                                             |                                                                                |                                    |                           |                         |                                                             |         |
| <b>c</b> Gross profit/(loss) (att sch)                                                                                                                                        |                                                                                |                                    |                           |                         |                                                             |         |
| <b>11</b> Other income (attach schedule)                                                                                                                                      | See Statement 1                                                                | 300.                               | 300.                      |                         |                                                             |         |
| <b>12</b> Total. Add lines 1 through 11                                                                                                                                       |                                                                                | 139,318.                           | 27,694.                   |                         |                                                             |         |
| <b>ADMINISTRATIVE AND OPERATING EXPENSES</b>                                                                                                                                  | <b>13</b> Compensation of officers, directors, trustees, etc                   | 17,320.                            | 8,660.                    |                         | 8,660.                                                      |         |
|                                                                                                                                                                               | <b>14</b> Other employee salaries and wages                                    |                                    |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>15</b> Pension plans, employee benefits                                     |                                    |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>16a</b> Legal fees (attach schedule)                                        |                                    |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>b</b> Accounting fees (attach sch)                                          |                                    |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>c</b> Other prof fees (attach sch)                                          |                                    |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>17</b> Interest                                                             |                                    |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>18</b> Taxes (attach schedule) (see instr)                                  |                                    |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>19</b> Depreciation (attach sch) and depletion                              |                                    |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>20</b> Occupancy                                                            |                                    |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>21</b> Travel, conferences, and meetings                                    |                                    |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>22</b> Printing and publications                                            |                                    |                           |                         |                                                             |         |
|                                                                                                                                                                               | <b>23</b> Other expenses (attach schedule)                                     | See Statement 2                    | 9,488.                    | 303.                    |                                                             | 9,185.  |
|                                                                                                                                                                               | <b>24</b> Total operating and administrative expenses. Add lines 13 through 23 |                                    | 26,808.                   | 8,963.                  |                                                             | 17,845. |
|                                                                                                                                                                               | <b>25</b> Contributions, gifts, grants paid Part XV                            |                                    | 26,783.                   |                         |                                                             | 26,783. |
| <b>26</b> Total expenses and disbursements. Add lines 24 and 25                                                                                                               |                                                                                | 53,591.                            | 8,963.                    |                         | 44,628.                                                     |         |
| <b>27</b> Subtract line 26 from line 12:                                                                                                                                      |                                                                                |                                    |                           |                         |                                                             |         |
| <b>a</b> Excess of revenue over expenses and disbursements                                                                                                                    |                                                                                | 85,727.                            |                           |                         |                                                             |         |
| <b>b</b> Net investment income (if negative, enter -0-)                                                                                                                       |                                                                                |                                    | 18,731.                   |                         |                                                             |         |
| <b>c</b> Adjusted net income (if negative, enter -0-)                                                                                                                         |                                                                                |                                    |                           |                         |                                                             |         |

| Part II Balance Sheets |                                                                                                                               | Beginning of year<br>(a) Book Value | End of year    |                       |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|----------------|-----------------------|
|                        |                                                                                                                               |                                     | (b) Book Value | (c) Fair Market Value |
| ASSETS                 | 1 Cash — non-interest-bearing                                                                                                 |                                     |                |                       |
|                        | 2 Savings and temporary cash investments                                                                                      | 498,782.                            | 123,024.       | 123,024.              |
|                        | 3 Accounts receivable                                                                                                         |                                     |                |                       |
|                        | Less: allowance for doubtful accounts                                                                                         | 1,560.                              |                |                       |
|                        | 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 the instructions) |                                     |                |                       |
|                        | 7 Other notes and loans receivable (attach sch.)                                                                              |                                     |                |                       |
|                        | Less: allowance for doubtful accounts                                                                                         |                                     |                |                       |
|                        | 8 Inventories for sale or use                                                                                                 |                                     |                |                       |
|                        | 9 Prepaid expenses and deferred charges                                                                                       |                                     |                |                       |
|                        | 10a Investments — U.S. and state government obligations (attach schedule) Statement 3                                         | 84,775.                             | 553,883.       | 544,370.              |
|                        | b Investments — corporate stock (attach schedule) Statement 4                                                                 | 269,077.                            | 167,064.       | 105,763.              |
|                        | c Investments — corporate bonds (attach schedule) Statement 5                                                                 |                                     | 96,000.        | 98,410.               |
| LIABILITIES            | 11 Investments — land, buildings, and equipment basis                                                                         |                                     |                |                       |
|                        | Less: accumulated depreciation (attach schedule)                                                                              |                                     |                |                       |
|                        | 12 Investments — mortgage loans                                                                                               |                                     |                |                       |
|                        | 13 Investments — other (attach schedule) Statement 6                                                                          | 75,000.                             | 75,000.        | 4,952.                |
|                        | 14 Land, buildings, and equipment basis                                                                                       |                                     |                |                       |
|                        | Less: accumulated depreciation (attach schedule)                                                                              |                                     |                |                       |
|                        | 15 Other assets (describe)                                                                                                    |                                     |                |                       |
|                        | 16 Total assets (to be completed by all filers — see instructions. Also, see page 1, item I)                                  | 929,194.                            | 1,014,971.     | 876,519.              |
|                        | 17 Accounts payable and accrued expenses                                                                                      |                                     |                |                       |
|                        | 18 Grants payable                                                                                                             |                                     |                |                       |
| FUND ASSETS            | 19 Deferred revenue                                                                                                           |                                     |                |                       |
|                        | 20 Loans from officers, directors, trustees, & other disqualified persons                                                     |                                     |                |                       |
|                        | 21 Mortgages and other notes payable (attach schedule)                                                                        |                                     |                |                       |
|                        | 22 Other liabilities (describe)                                                                                               |                                     |                |                       |
|                        | 23 Total liabilities (add lines 17 through 22)                                                                                | 0.                                  | 0.             |                       |
| FUND BALANCES          | Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.                            |                                     |                |                       |
|                        | 24 Unrestricted                                                                                                               |                                     |                |                       |
|                        | 25 Temporarily restricted                                                                                                     |                                     |                |                       |
|                        | 26 Permanently restricted                                                                                                     |                                     |                |                       |
|                        | Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.                                         |                                     |                |                       |
|                        | 27 Capital stock, trust principal, or current funds                                                                           |                                     |                |                       |
|                        | 28 Paid-in or capital surplus, or land, building, and equipment fund                                                          |                                     |                |                       |
|                        | 29 Retained earnings, accumulated income, endowment, or other funds                                                           | 929,194.                            | 1,014,971.     |                       |
|                        | 30 Total net assets or fund balances (see the instructions)                                                                   | 929,194.                            | 1,014,971.     |                       |
|                        | 31 Total liabilities and net assets/fund balances (see the instructions)                                                      | 929,194.                            | 1,014,971.     |                       |

## 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 | 929,194.   |
| 2 Enter amount from Part I, line 27a                                                                                                                         | 2 | 85,727.    |
| 3 Other increases not included in line 2 (itemize) See Statement 7                                                                                           | 3 | 50.        |
| 4 Add lines 1, 2, and 3                                                                                                                                      | 4 | 1,014,971. |
| 5 Decreases not included in line 2 (itemize)                                                                                                                 | 5 |            |
| 6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30                                                      | 6 | 1,014,971. |

**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 shares MLC Company) | (b) How acquired<br>P — Purchase<br>D — Donation | (c) Date acquired<br>(month, day, year) | (d) Date sold<br>(month, day, year) |
|------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|-----------------------------------------|-------------------------------------|
| <b>1a Publicly-traded securities</b>                                                                                                     | <b>P</b>                                         | <b>Various</b>                          | <b>Various</b>                      |
| <b>b</b>                                                                                                                                 |                                                  |                                         |                                     |
| <b>c</b>                                                                                                                                 |                                                  |                                         |                                     |
| <b>d</b>                                                                                                                                 |                                                  |                                         |                                     |
| <b>e</b>                                                                                                                                 |                                                  |                                         |                                     |

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| <b>a</b> 296,845.     |                                            | 281,899.                                        | 14,946.                                      |
| <b>b</b>              |                                            |                                                 |                                              |
| <b>c</b>              |                                            |                                                 |                                              |
| <b>d</b>              |                                            |                                                 |                                              |
| <b>e</b>              |                                            |                                                 |                                              |

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 |                                      |                                                     | (l) Gains (Column (h)<br>gain minus column (k), but not less<br>than -0-) or Losses (from column (h)) |
|---------------------------------------------------------------------------------------------|--------------------------------------|-----------------------------------------------------|-------------------------------------------------------------------------------------------------------|
| (i) Fair Market Value<br>as of 12/31/69                                                     | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of column (i)<br>over column (j), if any |                                                                                                       |
| <b>a</b>                                                                                    |                                      |                                                     | 14,946.                                                                                               |
| <b>b</b>                                                                                    |                                      |                                                     |                                                                                                       |
| <b>c</b>                                                                                    |                                      |                                                     |                                                                                                       |
| <b>d</b>                                                                                    |                                      |                                                     |                                                                                                       |
| <b>e</b>                                                                                    |                                      |                                                     |                                                                                                       |

|                                                                                                                                                                                                                                                                             |          |         |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|---------|
| <b>2</b> Capital gain net income or (net capital loss) <span style="border: 1px solid black; padding: 2px;">If gain, also enter in Part I, line 7<br/>If (loss), enter -0- in Part I, line 7</span>                                                                         | <b>2</b> | 14,946. |
| <b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)<br><br>If gain, also enter in Part I, line 8, column (c) (see the instructions). If (loss), enter -0- in Part I, line 8 <span style="border: 1px solid black; padding: 2px;"> </span> | <b>3</b> | 0.      |

**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.

| <b>1</b> Enter the appropriate amount in each column for each year, see the instructions before making any entries |                                       |                                              |                                                              |
|--------------------------------------------------------------------------------------------------------------------|---------------------------------------|----------------------------------------------|--------------------------------------------------------------|
| (a) Base period years<br>Calendar year (or tax year<br>beginning in)                                               | (b) Adjusted qualifying distributions | (c) Net value of<br>noncharitable-use assets | (d) Distribution ratio<br>(column (b) divided by column (c)) |
| 2008                                                                                                               | 46,900.                               | 883,167.                                     | 0.053104                                                     |
| 2007                                                                                                               | 38,854.                               | 952,397.                                     | 0.040796                                                     |
| 2006                                                                                                               | 23,234.                               | 822,951.                                     | 0.028233                                                     |
| 2005                                                                                                               | 19,722.                               | 637,306.                                     | 0.030946                                                     |
| 2004                                                                                                               | 11,183.                               | 607,383.                                     | 0.018412                                                     |

|                                                                                                                                                                                       |          |          |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|
| <b>2</b> Total of line 1, column (d)                                                                                                                                                  | <b>2</b> | 0.171491 |
| <b>3</b> 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 | <b>3</b> | 0.034298 |
| <b>4</b> Enter the net value of noncharitable-use assets for 2009 from Part X, line 5                                                                                                 | <b>4</b> | 809,403. |
| <b>5</b> Multiply line 4 by line 3                                                                                                                                                    | <b>5</b> | 27,761.  |
| <b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)                                                                                                                   | <b>6</b> | 187.     |
| <b>7</b> Add lines 5 and 6                                                                                                                                                            | <b>7</b> | 27,948.  |
| <b>8</b> Enter qualifying distributions from Part XII, line 4                                                                                                                         | <b>8</b> | 44,628.  |

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

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

|                                                                                                                                                                                                                                    |    |      |          |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|------|----------|
| 1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1<br>Date of ruling or determination letter: _____ (attach copy of letter if necessary - see instr.) |    |      |          |
| 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    | 187.     |
| c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b).                                                                                                       |    |      |          |
| 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)                                                                                                                        |    | 2    | 0.       |
| 3 Add lines 1 and 2                                                                                                                                                                                                                |    | 3    | 187.     |
| 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    | 187.     |
| 6 Credits/Payments:                                                                                                                                                                                                                |    |      |          |
| a 2009 estimated tax pmts and 2008 overpayment credited to 2009                                                                                                                                                                    | 6a | 867. |          |
| b Exempt foreign organizations – tax withheld at source                                                                                                                                                                            | 6b |      |          |
| c Tax paid with application for extension of time to file (Form 8868)                                                                                                                                                              | 6c |      |          |
| d Backup withholding erroneously withheld                                                                                                                                                                                          | 6d |      |          |
| 7 Total credits and payments. Add lines 6a through 6d                                                                                                                                                                              | 7  | 867. |          |
| 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  | 0.   |          |
| 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.                                                                                                                                      | 10 | 680. |          |
| 11 Enter the amount of line 10 to be Credited to 2010 estimated tax                                                                                                                                                                | 11 | 680. | Refunded |

**Part VII-A Statements Regarding Activities**

|                                                                                                                                                                                                                                                                                                                                                     | Yes | No  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-----|
| 1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?                                                                                                                                                                            |     | X   |
| b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?<br><i>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</i> |     | X   |
| c 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:<br>(1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.                                                                                                                              |     |     |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.                                                                                                                                                                               |     |     |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS?<br><i>If 'Yes,' attach a detailed description of the activities</i>                                                                                                                                                                               |     | 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? <i>If 'Yes,' attach a conformed copy of the changes</i>                                                                                                                 |     | X   |
| 4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?                                                                                                                                                                                                                                                     |     | X   |
| b If 'Yes,' has it filed a tax return on Form 990-T for this year?                                                                                                                                                                                                                                                                                  |     | N/A |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?<br><i>If 'Yes,' attach the statement required by General Instruction T</i>                                                                                                                                                                         |     | X   |
| 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:<br>• By language in the governing instrument, or<br>• 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? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>                                                                                                                                                                                                        | X   |     |
| 8 a Enter the states to which the foundation reports or with which it is registered (see the instructions)<br>CA                                                                                                                                                                                                                                    |     |     |
| b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If 'No,' attach explanation</i>                                                                                                                                | 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)? <i>If 'Yes,' complete Part XIV</i>                                                                                       |     | X   |
| 10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>                                                                                                                                                                                                        |     | X   |

BAA

Form 990-PF (2009)

**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 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?<br>Website address <u>None</u>                                                                     | 13 | X |   |
| 14 | The books are in care of <u>Foundation Source</u> Telephone no <u>800-839-1754</u><br>Located at <u>501 Silverside, Ste 123 Wilmington DE</u> ZIP + 4 <u>19809</u>                                                     |    |   |   |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <u>N/A</u><br>and enter the amount of tax-exempt interest received or accrued during the year <u>15</u> <u>N/A</u> |    |   |   |

**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  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|-----|
| 1 a During the year did the foundation (either directly or indirectly):                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                     |     |
| (1) Engage in the sale or exchange, or leasing of property with a disqualified person?                                                                                                                                                                                                                                                                                                                                                                                                           | <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 checked="" type="checkbox"/> Yes <input 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 the instructions)?<br>Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>                                                                                                                                                        | 1 b                                                                 | X   |
| c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?                                                                                                                                                                                                                                                                                                        | 1 c                                                                 | 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 5d and 6e, Part XIII) for tax year(s) beginning before 2009?<br>If 'Yes,' list the years <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>                                                                                                                                                                                                                                                            | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |     |
| b Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see the instructions.)                                                                                                                                                                           | 2 b                                                                 | 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 here<br><u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>                                                                                                                                                                                                                                                                                                                       |                                                                     |     |
| 3 a 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) | 3 b                                                                 | N/A |
| 4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?                                                                                                                                                                                                                                                                                                                                                                              | 4 a                                                                 | 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?                                                                                                                                                                                                                                                              | 4 b                                                                 | X   |

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Form 990-PF (2009)

**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 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 instructions)?

5b

N/A

Organizations relying on a current notice regarding disaster assistance check here

☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?N/A ☐ Yes ☐ No

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

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

6b

X

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?

7b

N/A

**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 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 |
|------------------------------------------------------------------------|----------------------------------------------------------|-------------------------------------------|-----------------------------------------------------------------------|---------------------------------------|
| Michael Korek<br>501 Silverside Rd, Ste 123<br>Wilmington, DE 19809    | Trustee<br>< 1 hr/wk                                     | 0.                                        | 0.                                                                    | 0.                                    |
| Brian Korek<br>501 Silverside Rd, Ste 123<br>Wilmington, DE 19809      | Trustee<br>3 hrs/wk                                      | 17,320.                                   | 0.                                                                    | 0.                                    |
| Cynthia Peterlin<br>501 Silverside Rd, Ste 123<br>Wilmington, DE 19809 | Trustee<br>< 1 hr/wk                                     | 0.                                        | 0.                                                                    | 0.                                    |
|                                                                        |                                                          |                                           |                                                                       |                                       |

**2** Compensation of five highest-paid employees (other than those included on line 1— see 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

☐

0





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

|                                                                                                                      |           |          |
|----------------------------------------------------------------------------------------------------------------------|-----------|----------|
| <b>1</b> Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes. |           |          |
| <b>a</b> Average monthly fair market value of securities                                                             | <b>1a</b> | 564,456. |
| <b>b</b> Average of monthly cash balances                                                                            | <b>1b</b> | 252,321. |
| <b>c</b> Fair market value of all other assets (see instructions)                                                    | <b>1c</b> | 4,952.   |
| <b>d Total</b> (add lines 1a, b, and c)                                                                              | <b>1d</b> | 821,729. |
| <b>e</b> Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).  | <b>1e</b> | 0.       |
| <b>2</b> Acquisition indebtedness applicable to line 1 assets                                                        | <b>2</b>  | 0.       |
| <b>3</b> Subtract line 2 from line 1d                                                                                | <b>3</b>  | 821,729. |
| <b>4</b> Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)   | <b>4</b>  | 12,326.  |
| <b>5 Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4        | <b>5</b>  | 809,403. |
| <b>6 Minimum investment return.</b> Enter 5% of line 5                                                               | <b>6</b>  | 40,470.  |

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

|                                                                                                             |           |         |
|-------------------------------------------------------------------------------------------------------------|-----------|---------|
| <b>1</b> Minimum investment return from Part X, line 6                                                      | <b>1</b>  | 40,470. |
| <b>2a</b> Tax on investment income for 2009 from Part VI, line 5                                            | <b>2a</b> | 187.    |
| <b>b</b> Income tax for 2009 (This does not include the tax from Part VI.)                                  | <b>2b</b> |         |
| <b>c</b> Add lines 2a and 2b                                                                                | <b>2c</b> | 187.    |
| <b>3</b> Distributable amount before adjustments. Subtract line 2c from line 1                              | <b>3</b>  | 40,283. |
| <b>4</b> Recoveries of amounts treated as qualifying distributions                                          | <b>4</b>  | 50.     |
| <b>5</b> Add lines 3 and 4                                                                                  | <b>5</b>  | 40,333. |
| <b>6</b> Deduction from distributable amount (see instructions)                                             | <b>6</b>  |         |
| <b>7 Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | <b>7</b>  | 40,333. |

**Part XII Qualifying Distributions** (see instructions)

|                                                                                                                                                               |           |         |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|---------|
| <b>1</b> Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes.                                                           |           |         |
| <b>a</b> Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26                                                                        | <b>1a</b> | 44,628. |
| <b>b</b> Program-related investments — total from Part IX-B                                                                                                   | <b>1b</b> |         |
| <b>2</b> Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes                                            | <b>2</b>  |         |
| <b>3</b> Amounts set aside for specific charitable projects that satisfy the:                                                                                 |           |         |
| <b>a</b> Suitability test (prior IRS approval required)                                                                                                       | <b>3a</b> |         |
| <b>b</b> Cash distribution test (attach the required schedule)                                                                                                | <b>3b</b> |         |
| <b>4 Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4                                           | <b>4</b>  | 44,628. |
| <b>5</b> 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) | <b>5</b>  | 187.    |
| <b>6 Adjusted qualifying distributions.</b> Subtract line 5 from line 4                                                                                       | <b>6</b>  | 44,441. |

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

**Part XIII** Undistributed Income (see instructions)

|                                                                                                                                                                                   | (a)<br>Corpus | (b)<br>Years prior to 2008 | (c)<br>2008 | (d)<br>2009 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| <b>1</b> Distributable amount for 2009 from Part XI, line 7                                                                                                                       |               |                            |             | 40,333.     |
| <b>2</b> Undistributed income, if any, as of the end of 2009.                                                                                                                     |               |                            |             |             |
| <b>a</b> Enter amount for 2008 only                                                                                                                                               |               |                            | 43,901.     |             |
| <b>b</b> Total for prior years 20____, 20____, 20____                                                                                                                             |               | 0.                         |             |             |
| <b>3</b> Excess distributions carryover, if any, to 2009.                                                                                                                         |               |                            |             |             |
| <b>a</b> From 2004                                                                                                                                                                |               |                            |             |             |
| <b>b</b> From 2005                                                                                                                                                                |               |                            |             |             |
| <b>c</b> From 2006                                                                                                                                                                |               |                            |             |             |
| <b>d</b> From 2007                                                                                                                                                                |               |                            |             |             |
| <b>e</b> From 2008                                                                                                                                                                |               |                            |             |             |
| <b>f</b> Total of lines 3a through e                                                                                                                                              | 0.            |                            |             |             |
| <b>4</b> Qualifying distributions for 2009 from Part XII, line 4. ▶ \$ 44,628.                                                                                                    |               |                            |             |             |
| <b>a</b> Applied to 2008, but not more than line 2a                                                                                                                               |               |                            | 43,901.     |             |
| <b>b</b> Applied to undistributed income of prior years (Election required — see instructions)                                                                                    |               | 0.                         |             |             |
| <b>c</b> Treated as distributions out of corpus (Election required — see instructions)                                                                                            | 0.            |                            |             |             |
| <b>d</b> Applied to 2009 distributable amount                                                                                                                                     |               |                            |             | 727.        |
| <b>e</b> Remaining amount distributed out of corpus                                                                                                                               | 0.            |                            |             |             |
| <b>5</b> Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)                                        | 0.            |                            |             | 0.          |
| <b>6</b> Enter the net total of each column as indicated below:                                                                                                                   |               |                            |             |             |
| <b>a</b> 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.                         |             |             |
| <b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed |               | 0.                         |             |             |
| <b>d</b> Subtract line 6c from line 6b Taxable amount — see instructions                                                                                                          |               | 0.                         |             |             |
| <b>e</b> Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount — see instructions                                                                            |               |                            | 0.          |             |
| <b>f</b> Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010                                                              |               |                            |             | 39,606.     |
| <b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)                                  | 0.            |                            |             |             |
| <b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)                                                                              | 0.            |                            |             |             |
| <b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a                                                                                              | 0.            |                            |             |             |
| <b>10</b> Analysis of line 9                                                                                                                                                      |               |                            |             |             |
| <b>a</b> Excess from 2005                                                                                                                                                         |               |                            |             |             |
| <b>b</b> Excess from 2006                                                                                                                                                         |               |                            |             |             |
| <b>c</b> Excess from 2007                                                                                                                                                         |               |                            |             |             |
| <b>d</b> Excess from 2008                                                                                                                                                         |               |                            |             |             |
| <b>e</b> Excess from 2009                                                                                                                                                         |               |                            |             |             |

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Form 990-PF (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 recipient | Purpose of grant or contribution | Amount            |
|-------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|----------------------------------|-------------------|
| Name and address (home or business)             |                                                                                                           |                                |                                  |                   |
| <b>a</b> Paid during the year<br>See attachment | N/A                                                                                                       | Public                         | See attachment                   | 26,783.           |
| <b>Total</b>                                    |                                                                                                           |                                |                                  | <b>3a</b> 26,783. |
| <b>b</b> Approved for future payment            |                                                                                                           |                                |                                  |                   |
| <b>Total</b>                                    |                                                                                                           |                                |                                  | <b>3b</b>         |

**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)<br>Related or exempt<br>function income<br>(see the instructions) |
|-------------------------------------------------|----------------------------------------------------------|---------------------------|---------------|--------------------------------------|---------------|-----------------------------------------------------------------------|
|                                                 |                                                          | (a)<br>Business<br>code   | (b)<br>Amount | (c)<br>Exclu-<br>sion<br>code        | (d)<br>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       |                           |               |                                      |               |                                                                       |
| 4                                               | Dividends and interest from securities                   |                           |               | 14                                   | 26,372.       |                                                                       |
| 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                                   | 14,946.       |                                                                       |
| 9                                               | Net income or (loss) from special events                 |                           |               |                                      |               |                                                                       |
| 10                                              | Gross profit or (loss) from sales of inventory           |                           |               |                                      |               |                                                                       |
| 11                                              | Other revenue                                            |                           |               |                                      |               |                                                                       |
| a                                               | Account Retention Income                                 |                           |               | 14                                   | 300.          |                                                                       |
| b                                               |                                                          |                           |               |                                      |               |                                                                       |
| c                                               |                                                          |                           |               |                                      |               |                                                                       |
| d                                               |                                                          |                           |               |                                      |               |                                                                       |
| e                                               |                                                          |                           |               |                                      |               |                                                                       |
| 12                                              | Subtotal. Add columns (b), (d), and (e)                  |                           |               |                                      | 41,618.       |                                                                       |
| 13                                              | <b>Total.</b> Add line 12, columns (b), (d), and (e)     |                           |               |                                      | 13            | 41,618.                                                               |

(See worksheet in the instructions for line 13 to verify calculations )

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

[illegible]



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

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

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

OMB No 1545 0047

**2009**

Name of the organization **Michael & Ina Korek Foundation**

Employer identification number  
**77-6140213**

**Organization type** (check one)

**Filers of:**

Form 990 or 990-EZ

**Section:**

- ☐ 501(c)(\_\_\_\_) (enter number) organization  
☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation  
☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation  
☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation  
☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule –**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. (Complete Parts I and II.)

**Special Rules –**

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ, that met the 33-1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ, that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ, that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ► \$ \_\_\_\_\_

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

**BAA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.**

**Schedule B** (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization

Employer identification number

Michael &amp; Ina Korek Foundation

77-6140213

**Part I** Contributors (see instructions)

| (a)<br>Number | (b)<br>Name, address, and ZIP + 4                           | (c)<br>Aggregate<br>contributions | (d)<br>Type of contribution                                                                                                                                                  |
|---------------|-------------------------------------------------------------|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1             | Michael Korek<br>132 Hamilton Street<br>Los Altos, CA 94022 | \$ 97,700.                        | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input checked="" type="checkbox"/><br>(Complete Part II if there is a noncash contribution.) |
|               |                                                             |                                   | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)            |
|               |                                                             |                                   | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)            |
|               |                                                             |                                   | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)            |
|               |                                                             |                                   | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)            |
|               |                                                             |                                   | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)            |
|               |                                                             |                                   | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II if there is a noncash contribution.)            |



Employer identification number

77-6140213

| (a)<br>No. from<br>Part I | (b)<br>Description of noncash property given | (c)<br>FMV (or estimate)<br>(see instructions) | (d)<br>Date received |
|---------------------------|----------------------------------------------|------------------------------------------------|----------------------|
| 1                         | CALIFORNIA ST GO BDSBUILD AMERICA BONDS      | \$ 97,700.                                     | 12/18/09             |
|                           | 07.500000% (1363A5E0), 100000 shs            |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
| (a)<br>No. from<br>Part I | (b)<br>Description of noncash property given | (c)<br>FMV (or estimate)<br>(see instructions) | (d)<br>Date received |
|                           |                                              | \$                                             |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
| (a)<br>No. from<br>Part I | (b)<br>Description of noncash property given | (c)<br>FMV (or estimate)<br>(see instructions) | (d)<br>Date received |
|                           |                                              | \$                                             |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
| (a)<br>No. from<br>Part I | (b)<br>Description of noncash property given | (c)<br>FMV (or estimate)<br>(see instructions) | (d)<br>Date received |
|                           |                                              | \$                                             |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
| (a)<br>No. from<br>Part I | (b)<br>Description of noncash property given | (c)<br>FMV (or estimate)<br>(see instructions) | (d)<br>Date received |
|                           |                                              | \$                                             |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
| (a)<br>No. from<br>Part I | (b)<br>Description of noncash property given | (c)<br>FMV (or estimate)<br>(see instructions) | (d)<br>Date received |
|                           |                                              | \$                                             |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |
|                           |                                              |                                                |                      |

**Statement 1**  
**Form 990-PF, Part I, Line 11**  
**Other Income**

|                          | (a)<br>Revenue<br>per Books | (b) Net<br>Investment<br>Income | (c)<br>Adjusted<br>Net Income |
|--------------------------|-----------------------------|---------------------------------|-------------------------------|
| Account Retention Income | \$ 300.                     | \$ 300.                         |                               |
| Total                    | \$ 300.                     | \$ 300.                         | 0.                            |

**Statement 2**  
**Form 990-PF, Part I, Line 23**  
**Other Expenses**

|                               | (a)<br>Expenses<br>per Books | (b) Net<br>Investment<br>Income | (c)<br>Adjusted<br>Net Income | (d)<br>Charitable<br>Purposes |
|-------------------------------|------------------------------|---------------------------------|-------------------------------|-------------------------------|
| Administrative fees           | \$ 8,690.                    |                                 |                               | \$ 8,690.                     |
| Bank charges                  | 303.                         | \$ 303.                         |                               |                               |
| Foundation dues & memberships | 495.                         |                                 |                               | 495.                          |
| Total                         | \$ 9,488.                    | \$ 303.                         |                               | \$ 9,185.                     |

**Statement 3**  
**Form 990-PF, Part II, Line 10a**  
**Investments - U.S. and State Government Obligations**

| State/Municipal Obligations             | Valuation<br>Method | Book<br>Value | Fair Market<br>Value |
|-----------------------------------------|---------------------|---------------|----------------------|
| CA Edl Facs Auth Rev Bds 5% 7/1/45      | Cost                | \$ 98,349.    | \$ 101,725.          |
| CA St GO Bds Var Purp 6% 4/1/32         | Cost                | 50,000.       | 51,241.              |
| CA St Go Bds Build America Bds 07.5000% | Cost                | 203,025.      | 194,120.             |
| Las Vegas NV CTFS City Hall 7.8% 9/1/39 | Cost                | 101,769.      | 98,971.              |
| Pensacola FL Redev Rev Build Amer Bonds | Cost                | 100,740.      | 98,313.              |
|                                         |                     | \$ 553,883.   | \$ 544,370.          |
| Total                                   |                     | \$ 553,883.   | \$ 544,370.          |

**Statement 4**  
**Form 990-PF, Part II, Line 10b**  
**Investments - Corporate Stocks**

| Corporate Stocks                        | Valuation<br>Method | Book<br>Value | Fair Market<br>Value |
|-----------------------------------------|---------------------|---------------|----------------------|
| 5,000 shs Alpine Total Dynamic Dividend | Cost                | \$ 104,010.   | \$ 44,600.           |
| 63,054 shs Reserve Fund Primary III     | Cost                | 63,054.       | 61,163.              |
| Total                                   |                     | \$ 167,064.   | \$ 105,763.          |

**Statement 5**  
**Form 990-PF, Part II, Line 10c**  
**Investments - Corporate Bonds**

| <u>Corporate Bonds</u>                 | <u>Valuation<br/>Method</u> | <u>Book<br/>Value</u> | <u>Fair Market<br/>Value</u> |
|----------------------------------------|-----------------------------|-----------------------|------------------------------|
| Goldman Sachs GRP Inc 6.5% 6/15/19     | Cost                        | \$ 50,000.            | \$ 52,549.                   |
| Zurich Reins Ctr Hldgs 7.125% 10/15/23 | Cost                        | 46,000.               | 45,861.                      |
|                                        | Total                       | <u>\$ 96,000.</u>     | <u>\$ 98,410.</u>            |

**Statement 6**  
**Form 990-PF, Part II, Line 13**  
**Investments - Other**

| <u>Other Investments</u> | <u>Valuation<br/>Method</u> | <u>Book<br/>Value</u> | <u>Fair Market<br/>Value</u> |
|--------------------------|-----------------------------|-----------------------|------------------------------|
| Infinite Z, LLC          | Cost                        | \$ 75,000.            | \$ 4,952.                    |
|                          | Total                       | <u>\$ 75,000.</u>     | <u>\$ 4,952.</u>             |

**Statement 7**  
**Form 990-PF, Part III, Line 3**  
**Other Increases**

|                |       |               |
|----------------|-------|---------------|
| Returned grant |       | \$ 50.        |
|                | Total | <u>\$ 50.</u> |

**Michael and Ina Korek Foundation Trust**  
**EIN: 77-6140213**  
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**Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year**

| Recipient name and address (home or business)                                                          | If recipient is an individual, show any relationship to any foundation manager or substantial contributor |  | Foundation status of recipient | Purpose of grant or contribution     | Amount     |
|--------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--|--------------------------------|--------------------------------------|------------|
|                                                                                                        |                                                                                                           |  |                                |                                      |            |
| ACLU FOUNDATION OF SOUTHERN CALIF<br>1313 8TH STREET, LOS ANGELES, CA 90017                            | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED               | \$75 00    |
| ADDISON PENZAK JEWISH COMMUNITY CENTER OF SILICON VALLEY<br>14855 OKA ROAD, LOS GATOS, CA 95032        | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED               | \$100 00   |
| AFRICAN LIBRARY PROJECT<br>5 THISTLE ST, PORTOLA VALLY, CA 94028                                       | N/A                                                                                                       |  | 509(a)(1)                      | BOB CATHCART MEDICAL LIBRARY PROGRAM | \$300 00   |
| ALBERT L SCHULTZ JEWISH COMMUNITY CENTER<br>4000 MIDDLEFIELD RD STE R, PALO ALTO, CA 94303             | N/A                                                                                                       |  | 509(a)(2)                      | GENERAL & UNRESTRICTED               | \$2,100 00 |
| ALLEY CAT RESCUE INC<br>PO BOX 585, MT RAINIER, MD 20712                                               | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED               | \$75 00    |
| ALZHEIMERS DISEASE AND RELATED DISORDERS ASSOCIATION<br>1060 LA AVENIDA ST, MOUNTAIN VIEW, CA 94043    | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED               | \$75 00    |
| AMERICAN ASSOCIATES BEN-GURION UNIVERSITY OF THE NEGEV INC<br>1430 BROADWAY 8TH FL, NEW YORK, NY 10018 | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED               | \$100 00   |
| AMERICAN COMMITTEE FOR SHAARE ZEDEK<br>49 W 45TH ST, NEW YORK, NY 10036                                | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED               | \$50 00    |

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|------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|----------------------------------|----------|
| AMERICAN HEART ASSOCIATION INC<br>7272 GREENVILLE AVE, DALLAS, TX 75231                  | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$75 00  |
| AMERICAN JEWISH COMMITTEE<br>165 E 56TH ST, NEW YORK, NY 10022                           | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$75 00  |
| AMERICAN LUNG ASSOCIATION<br>61 BROADWAY, NEW YORK, NY 10006                             | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$50 00  |
| AMERICAN PROSTATE SOCIETY INC<br>1327 ASHTON RD STE 3, HANOVER, MD 21076                 | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$75 00  |
| AMERICANS UNITED FOR SEPARATION OF CHURCH AND STATE<br>518 C ST NE, WASHINGTON, DC 20002 | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$75 00  |
| AMIT WOMEN INC<br>817 BROADWAY FL 4, NEW YORK, NY 10003                                  | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$235 00 |
| AMNESTY INTERNATIONAL USA INC<br>5 PENN PLZ FL 16, NEW YORK, NY 10001                    | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$50 00  |
| ANIMAL LEGAL DEFENSE FUND<br>170 EAST COTATI AVE , COTATI, CA 94931                      | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$160 00 |

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|--------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|----------------------------------|----------|
| ANIMAL SANCTUARY OF THE UNITED STATES<br>P O. BOX 690422, SAN ANTONIO, TX 78269      | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100.00 |
| ANTI-DEFAMATION LEAGUE OF BNAI BRITH<br>605 THIRD AVENUE, NEW YORK, NY 10158         | N/A                                                                                                       | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$500.00 |
| ASSOCIATION OF SMALL FOUNDATIONS<br>1720 N STREET NW, WASHINGTON, DC 20036           | N/A                                                                                                       | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$300.00 |
| BEST FRIENDS ANIMAL SOCIETY<br>5001 ANGEL CANYON RD, KANAB, UT 84741                 | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100.00 |
| BIG BROTHERS-BIG SISTERS OF NEVADA COUNTY INC<br>PO BOX 1362, GRASS VALLEY, CA 95945 | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100.00 |
| BNAI BRITH<br>433 GRANTHAM B, DEERFIELD BCH, FL 33442                                | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$50.00  |
| BNAI BRITH<br>2020 K ST NW FL 7, WASHINGTON, DC 20006                                | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$50.00  |
| BNAI BRITH INTERNATIONAL<br>229 E WISCONSIN AVE STE 1100, MILWAUKEE, WI 53202        | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$50.00  |

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|-------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|--------------------------------------|----------|
| BOY SCOUTS OF AMERICA<br>PO BOX 13558, SACRAMENTO, CA 95853                               | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED               | \$200 00 |
| BOYS TOWN JERUSALEM FOUNDATION OF AMERICA INC<br>1 PENN PLAZA NO 6250, NEW YORK, NY 10119 | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED               | \$50 00  |
| BRADY CENTER TO PREVENT GUN VIOLENCE<br>1225 I STREET NW, WASHINGTON, DC 20005            | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED               | \$75 00  |
| CALIFORNIA ACADEMY OF SCIENCES<br>55 MUSIC CONCOURSE DRIVE, SAN FRANCISCO, CA 94118       | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED               | \$250 00 |
| CALIFORNIA AGGIE ALUMNI ASSOCIATION<br>UNIVERSITY OF CALIFORNIA DAVIS, DAVIS, CA 95616    | N/A                                                                                                       | 509(a)(1)                      | APPLICATION FEES/TUITION SCHOLARSHIP | \$100 00 |
| CALIFORNIA STATE PARKS FOUNDATION<br>800 COLLEGE AVE, KENTFIELD, CA 94904                 | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED               | \$225 00 |
| CANCER CONTROL SOCIETY<br>2043 N BERENDO ST, LOS ANGELES, CA 90027                        | N/A                                                                                                       | 509(a)(2)                      | GENERAL & UNRESTRICTED               | \$500 00 |
| CAPITAL PUBLIC RADIO INC<br>7055 FOLSOM BLVD, SACRAMENTO, CA 95826                        | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED               | \$120 00 |

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|--------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|----------------------------------|----------|
| CENTER FOR BIOLOGICAL DIVERSITY INC<br>PO BOX 710, TUCSON, AZ 85702                              | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| CENTER FOR PUBLIC INTEGRITY<br>910 17TH STREET NW 7TH FLOOR, WASHINGTON, DC 20006                | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| CHABAD OF CALIFORNIA<br>741 GAYLEY AVE. LOS ANGELES, CA 90024                                    | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| CHILDREN AFFECTED BY AIDS FOUNDATION<br>6033 W CENTURY BLVD, LOS ANGELES, CA 90045               | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| CITY COLLEGE FUND<br>CONVENT AVE AND 138 ST, NEW YORK, NY 10031                                  | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| CITY TEAM MINISTRIES<br>2304 ZANKER RD, SAN JOSE, CA 95131                                       | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| COMMITTEE FOR ACCURACY IN MIDDLE EAST REPORTING IN AMERICA INC<br>PO BOX 35040, BOSTON, MA 02135 | N/A                                                                                                       | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| COMMONWEALTH CLUB OF CALIFORNIA ST FRANCIS HOTEL<br>595 MARKET ST, SAN FRANCISCO, CA 94105       | N/A                                                                                                       | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$90 00  |



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|-----------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|----------------------------------|------------|
| COMMUNITY SCHOOL OF MUSIC AND ARTS<br>230 SAN ANTONIO CIR, MOUNTAIN VIEW, CA 94040                  | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100.00   |
| COMMUNITY SERVICES AGENCY<br>204 STIERLIN RD, MOUNTAIN VIEW, CA 94043                               | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100.00   |
| CONGREGATION BETH AM<br>26790 ARASTRADERO ROAD, LOS ALTOS HILLS, CA 94022                           | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$2,500.00 |
| CONTEMPORARY JEWISH MUSEUM<br>282 2ND STREET, 2ND FLOOR, SAN FRANCISCO, CA 94103                    | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$75.00    |
| COOPERATIVE FOR ASSISTANCE AND RELIEF EVERYWHERE<br>INC - CARE<br>PO BOX 1871, MERRIFIELD, VA 22116 | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100.00   |
| CORPORATION OF THE FINE ARTS MUSEUMS<br>50 HAGIWARA TEA GARDEN DR, SAN FRANCISCO, CA 94118          | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$85.00    |
| DEFENDERS OF WILDLIFE<br>1130 17TH ST NW, WASHINGTON, DC 20036                                      | N/A                                                                                                       | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$100.00   |
| DOCTORS WITHOUT BORDERS USA INC<br>333 7TH AVE FL 2, NEW YORK, NY 10001                             | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$200.00   |

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|--------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|----------------------------------|----------|
| EARTHJUSTICE<br>426 17TH ST FL 6, OAKLAND, CA 94612                                              | N/A                                                                                                       | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$75 00  |
| ENVIRONMENTAL DEFENSE INCORPORATED<br>1875 CONNECTICUT AVE NW SUITE 600, WASHINGTON, DC 20009    | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$75 00  |
| FACTS AND LOGIC ABOUT THE MIDDLE EAST INC<br>PO BOX 590359, SAN FRANCISCO, CA 94159              | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$175 00 |
| FOOTHILL DE ANZA COLLEGES FOUNDATION<br>12345 S EL MONTE RD, LOS ALTOS, CA 94022                 | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| FOUNDATION FOR MIND BEING RESEARCH<br>442 KNOLL DR, LOS ALTOS, CA 94024                          | N/A                                                                                                       | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| GLAUCOMA RESEARCH FOUNDATION<br>251 POST ST STE 600, SAN FRANCISCO, CA 94108                     | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$75 00  |
| GLIDE MEMORIAL UNITED METHODIST CHURCH<br>330 ELLIS STREET, SAN FRANCISCO, CA 94102              | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$400 00 |
| GOLDEN GATE COLLECTORS M H DEYOUNG MEMORIAL MUSEUM FUND<br>1971 9TH AVE, SAN FRANCISCO, CA 94116 | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |

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|-------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--|--------------------------------|----------------------------------|----------|
|                                                                                                                               |                                                                                                           |  |                                |                                  |          |
| GREENPEACE FUND INC<br>702 H ST NW STE 300, WASHINGTON, DC 20001                                                              | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$75 00  |
| HABITAT FOR HUMANITY INTERNATIONAL<br>121 HABITAT STREET, AMERICUS, GA 31709                                                  | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| HALT (HELP ABOLISH LEGAL TYRANNY) AN ORGANIZATION OF AMERICANS FOR LEGAL REFORM<br>1612 K ST NW STE 510, WASHINGTON, DC 20006 | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$75 00  |
| HIAS INC<br>333 SEVENTH AVE 16TH FLR, NEW YORK, NY 10001                                                                      | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$500 00 |
| HOPE REHABILITATION SERVICES<br>30 LAS COLINAS LN, SAN JOSE, CA 95119                                                         | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| HOSPICE OF THE FOOTHILLS<br>12399 NEVADA CITY HWY, GRASS VALLEY, CA 95945                                                     | N/A                                                                                                       |  | 509(a)(1)                      | PAVE THE WAY PROJECT             | \$100 00 |
| HUMANE EDUCATION NETWORK<br>3027 BARNEY AVE, MENLO PARK, CA 94025                                                             | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| INSTITUTE OF NOETIC SCIENCES<br>101 SAN ANTONIO RD, PETALUMA, CA 94952                                                        | N/A                                                                                                       |  | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$120.00 |

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|--------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|----------------------------------|-----------------------|
| INTERNATIONAL ASSOCIATION OF CANCER VICTORS AND FRIENDS<br>20111 CANYON VIEW DR 277, SANTA CLARITA, CA 91351             | N/A                                                                                                       | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$300 00              |
| INTERNATIONAL CAMPAIGN FOR TIBET<br>1825 JEFFERSON PLACE, N W, WASHINGTON, DC 20036                                      | N/A                                                                                                       | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$100 00              |
| INTERNATIONAL MEDIA PROJECT<br>1714 FRANKLIN ST SUITE #100-251, OAKLAND, CA 94612                                        | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00              |
| INTERNATIONAL MEDIA PROJECT<br>1714 FRANKLIN ST SUITE #100-251, OAKLAND, CA 94612                                        | N/A                                                                                                       | 509(a)(1)                      | NATIONAL RADIO PROJECT           | \$75 00               |
| INTERNATIONAL PLANNED PARENTHOOD FEDERATION<br>120 WALL STREET 9TH FLOOR, NEW YORK, NY 10005                             | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 <sup>4</sup> |
| INTERNATIONAL RESCUE COMMITTEE INC<br>122 EAST 42ND STREET, NEW YORK, NY 10168                                           | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00              |
| ISRAEL EMERGENCY ALLIANCE<br>3710 ROBERTSON BLVD STE 205, CULVER CITY, CA 90232                                          | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00              |
| JANE GOODALL INSTITUTE FOR WILDLIFE RESEARCH<br>EDUCATION & CONSERVATION<br>4245 FAIRFAX DR STE 600, ARLINGTON, VA 22203 | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$50 00               |

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|--------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|----------------------------------|----------|
| JEWISH COMMUNITY FEDERATION OF S F MARIN PENINSULA & SONOMA COUNTIES<br>121 STEUART, SAN FRANCISCO, CA 94105 | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$218 00 |
| JEWISH FAMILY & CHILDRENS SERVICES<br>2150 POST ST, SAN FRANCISCO, CA 94115                                  | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$500 00 |
| JEWISH NATIONAL FUND-KEREN KAYEMETH LEISRAEL INC<br>42 EAST 69TH STREET, NEW YORK, NY 10021                  | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| JEWISH WAR VETERANS USA NATIONAL MEMORIAL INC<br>1811 R ST NW, WASHINGTON, DC 20009                          | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$200 00 |
| JUST ONE LIFE INC<br>275 MADISON AVE FL 30, NEW YORK, NY 10016                                               | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| KIDNEY CANCER ASSOCIATION<br>1234 SHERMAN AVE STE 203, EVANSTON, IL 60202                                    | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100.00 |
| KME INC<br>2595 CAPITOL OAKS DR, SACRAMENTO, CA 95833                                                        | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$150 00 |
| LUCILE PACKARD FOUNDATION FOR CHILDREN'S HEALTH<br>400 HAMILTON AVENUE, PALO ALTO, CA 94301                  | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |

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|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|----------------------------------|----------|
| MARINE MAMMAL CENTER<br>1065 FORT CRONKHITE, SAUSALITO, CA 94965                           | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| MIDDLE EAST MEDIA WATCH INC<br>520 8TH AVENUE, NEW YORK, NY 10018                          | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| MONO LAKE FOUNDATION<br>PO BOX 29, LEE VINING, CA 93541                                    | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100.00 |
| MOTHERS AGAINST DRUNK DRIVING<br>511 E JOHN CARPENTER FREEWAY, IRVING, TX 75062            | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| NATIONAL INSTITUTE FOR JEWISH HOSPICE<br>1880 CENTURY PARK EAST 200, LOS ANGELES, CA 90067 | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| NATIONAL YIDDISH BOOK CENTER INC<br>1021 WEST ST, AMHERST, MA 01002                        | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| NATURAL RESOURCES DEFENSE COUNCIL INC<br>40 WEST 20TH STREET, NEW YORK, NY 10011           | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$75 00  |
| NEXT DOOR<br>234 E GISH RD STE 200, SAN JOSE, CA 95112                                     | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |

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| NIKE ANIMAL RESCUE FOUNDATION<br>PO BOX 26587, SAN JOSE, CA 95159                        | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$150 00 |
| NORTHERN CALIFORNIA PUBLIC BROADCASTING INC<br>2601 MARIPOSA ST, SAN FRANCISCO, CA 94110 | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$365 00 |
| ONE CHILD<br>260 TRAMINER CT, FREMONT, CA 94539                                          | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| PAACT INC<br>1143 PARMELEE AVE NW, GRAND RAPIDS, MI 49504                                | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| PALACE OF FINE ARTS LEAGUE INC<br>3301 LYON ST, SAN FRANCISCO, CA 94123                  | N/A                                                                                                       | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$100.00 |
| PATHWAYS HOSPICE FOUNDATION<br>585 N MARY AVE, SUNNYVALE, CA 94085                       | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| PENINSULA MACROBIOTIC COMMUNITY<br>99 OAK HAVEN WAY, WOODSIDE, CA 94062                  | N/A                                                                                                       | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| PENN VALLEY COMMUNITY FOUNDATION<br>PO BOX 186, PENN VALLEY, CA 95946                    | N/A                                                                                                       | 509(a)(1)                      | COMMUNITY CENTER PROJECT         | \$100 00 |

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| PENN VALLEY FIRE DEPARTMENT AUXILIARY<br>PO BOX 592, PENN VALLEY, CA 95946                                 | N/A                                                                                                       | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$105 00 |
| PEOPLE FOR THE AMERICAN WAY FOUNDATION<br>2000 M STREET NW, WASHINGTON, DC 20036                           | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$200 00 |
| PEOPLE FOR THE ETHICAL TREATMENT OF ANIMALS INC<br>501 FRONT STREET, NORFOLK, VA 23510                     | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| PETS IN NEED<br>1190 MAIN ST, REDWOOD CITY, CA 94063                                                       | N/A                                                                                                       | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$100.00 |
| PHYSICIANS COMMITTEE FOR RESPONSIBLE MEDICINE INC<br>5100 WISCONSIN AVE NW STE 400, WASHINGTON, DC 20016   | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| PHYSICIANS FOR SOCIAL RESPONSIBILITY INC<br>1875 CONNECTICUT AVE NW STE 10, WASHINGTON, DC 20009           | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100.00 |
| PLANNED PARENTHOOD ASSOCIATION OF METROPOLITAN WASHINGTON D C INC<br>1108 16TH ST NW, WASHINGTON, DC 20036 | N/A                                                                                                       | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| POLYTECHNIC UNIVERSITY<br>6 METROTECH CTR, BROOKLYN, NY 11201                                              | N/A                                                                                                       | 509(a)(1)                      | STAN NISENSEN FUND               | \$500 00 |



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|---------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--|--------------------------------|----------------------------------|----------|
|                                                                                                   |                                                                                                           |  |                                |                                  |          |
| PROJECT OPEN HAND<br>730 POLK ST 3RD FLOOR, SAN FRANCISCO, CA 94109                               | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| PROSTATE AWARENESS FOUNDATION<br>2166 12TH AVE, SAN FRANCISCO, CA 94116                           | N/A                                                                                                       |  | 509(a)(1)                      | CANCER CLIMB PROJECT             | \$150 00 |
| PROSTATE CANCER RESEARCH AND EDUCATION FOUNDATION<br>5480 BALTIMORE DR STE 202, LA MESA, CA 91942 | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$200 00 |
| PROSTATE CANCER RESEARCH INSTITUTE<br>5777 W CENTURY BLVD, LOS ANGELES, CA 90045                  | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$310 00 |
| RESEARCH TO PREVENT BLINDNESS INC<br>645 MADISON AVENUE, NEW YORK, NY 10022                       | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$75.00  |
| RIDING HIGH EQUESTRIAN PROGRAM<br>11685 LORENSON RD, AUBURN, CA 95602                             | N/A                                                                                                       |  | 509(a)(1)                      | THERAPY FOR A CHILD PROGRAM      | \$100 00 |
| RONALD MCDONALD HOUSE AT STANFORD<br>520 SAND HILL RD, PALO ALTO, CA 94304                        | N/A                                                                                                       |  | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| RURAL CALIFORNIA BROADCASTING CORP KRCB-TV CHANNEL 22<br>5850 LABATH AVE, ROHNERT PARK, CA 94928  | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$250 00 |

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| SAN FRANCISCO AIDS FOUNDATION<br>PO BOX 426182, SAN FRANCISCO, CA 94142                               | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| SAN FRANCISCO BAY BIRD OBSERVATORY<br>524 VALLEY WAY, MILPITAS, CA 95035                              | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| SAN FRANCISCO CITY GUIDES<br>C/O MAIN LIBRARY, SAN FRANCISCO, CA 94102                                | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$75 00  |
| SAN FRANCISCO SYMPHONY<br>201 VAN NESS AVE, SAN FRANCISCO, CA 94102                                   | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| SAN JOSE MUSEUM OF ART ASSOCIATION<br>110 S MARKET ST, SAN JOSE, CA 95113                             | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$150 00 |
| SECOND HARVEST FOOD BANK OF SANTA CLARA AND SAN MATEO COUNTIES<br>750 CURTNER AVE, SAN JOSE, CA 95125 | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| SIERRA CLUB FOUNDATION<br>85 2ND ST STE 750, SAN FRANCISCO, CA 94105                                  | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| SIMON WIESENTHAL CENTER<br>1399 S ROXBURY 2ND FL, LOS ANGELES, CA 90035                               | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |

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|---------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--|--------------------------------|----------------------------------|------------|
|                                                                                                   |                                                                                                           |  |                                |                                  |            |
| SMART LIFE FORUM INC<br>14436 ESTERLEE DRIVE, SARATOGA, CA 95070                                  | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$2,000 00 |
| STANFORD UNIVERSITY<br>DEVELOPMENT OFFICE, ARRILLAGA ALUMNI CTR, PALO ALTO, CA 94305              | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00   |
| TAWONGA JEWISH COMMUNITY CORPORATION<br>131 STEUART ST STE 460, SAN FRANCISCO, CA 94105           | N/A                                                                                                       |  | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$150 00   |
| THE CENTER FOR JEWISH CAMPUS LIFE INC<br>PO BOX 20526, STANFORD, CA 94309                         | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00   |
| THE HEALTH TRUST, MEALS-ON-WHEELS PROGRAM<br>2105 S. BASCOM AVENUE, SUITE 220, CAMPBELL, CA 95125 | N/A                                                                                                       |  | 509(a)(2)                      | MEALS-ON-WHEELS PROGRAM          | \$100 00   |
| THE SALVATION ARMY<br>359 N 4TH STREET, SAN JOSE, CA 95112                                        | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$75 00    |
| THE SALVATION ARMY - SANTA CLARA COUNTY<br>359 N 4TH STREET, SAN JOSE, CA 95109                   | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00   |
| THE SMILE TRAIN<br>245 FIFTH AVENUE, SUITE 2201, NEW YORK, NY 10016                               | N/A                                                                                                       |  | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00   |

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| THE TECH MUSEUM OF INNOVATION<br>201 S MARKET ST, SAN JOSE, CA 95113                  | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$250 00 |
| THEATREWORKS<br>1100 HAMILTON CT, MENLO PARK, CA 94025                                | N/A                                                                                                       | 509(a)(2)                      | GENERAL & UNRESTRICTED           | \$250 00 |
| UNION OF COUNCILS FOR SOVIET JEWS INC<br>PO BOX 11676, WASHINGTON, DC 20008           | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| US TOO INTERNATIONAL INC<br>5003 FAIRVIEW AVE, DOWNERS GROVE, IL 60515                | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |
| UTILITY REFORM NETWORK<br>711 VAN NESS AVE STE 350, SAN FRANCISCO, CA 94102           | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$400 00 |
| VIETNAM VETERANS OF CALIFORNIA INC<br>PO BOX 378, SANTA ROSA, CA 95402                | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$75 00  |
| WILDERNESS SOCIETY<br>1615 M NW STREET 2ND FL, WASHINGTON, DC 20036                   | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$75 00  |
| WILDLIFE CONSERVATION SOCIETY<br>2300 SOUTHERN BOULEVARD ATTENTION P, BRONX, NY 10460 | N/A                                                                                                       | 509(a)(1)                      | GENERAL & UNRESTRICTED           | \$100 00 |

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|----------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|-----|--------------------------------------|-----------------------------------------------------|------------|
|                                                                                                                                  |                                                                                                                    |     |                                      |                                                     |            |
| WORLD AFFAIRS COUNCIL OF NORTHERN CALIFORNIA,<br>GLOBAL PHILANTHROPY FORUM PROJECT<br>312 SUTTER STREET, SAN FRANCISCO, CA 94108 |                                                                                                                    | N/A | 509(a)(1)                            | GLOBAL PHILANTHROPY FORUM PROJECT                   | \$1,700 00 |
| WORLD JEWISH CONGRESS FOUNDATION<br>2125 BISCAYNE BLVD SUITE, MIAMI, FL 33137                                                    |                                                                                                                    | N/A | 509(a)(1)                            | GENERAL & UNRESTRICTED                              | \$150 00   |
| WORLD WILDLIFE FUND INC<br>1250 24TH ST N W, WASHINGTON, DC 20037                                                                |                                                                                                                    | N/A | 509(a)(1)                            | GENERAL & UNRESTRICTED                              | \$75 00    |
| YMCA OF THE MID-PENINSULA<br>2400 GENG RD STE 120, PALO ALTO, CA 94303                                                           |                                                                                                                    | N/A | 509(a)(1)                            | CANCER SURVIVORS AND EAST PALO ALTO KIDS<br>PROGRAM | \$250 00   |
| ZIONIST ORGANIZATION OF AMERICA<br>4 E 34TH ST, NEW YORK, NY 10016                                                               |                                                                                                                    | N/A | 509(a)(1)                            | GENERAL & UNRESTRICTED                              | \$75 00    |
| TOTAL:                                                                                                                           |                                                                                                                    |     |                                      |                                                     | \$26,783   |