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Form 990-PF

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

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning 01-01-2009 , and ending 12-31-2009

G

Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation BEIGHTLER SQUIRES CHARITABLE TRUST		A Employer identification number 77-6183959	
	Number and street (or P O box number if mail is not delivered to street address) 1100 IRVINE BLVD 31		Room/suite	B Telephone number (see page 10 of the instructions) (714) 665-9591
	City or town, state, and ZIP code TUSTIN, CA 927803529			

H Check type of organization

☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust

☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,139,638

J Accounting method

☒ Cash

☐ Accrual

☐ Other (specify) (Part I, column (d) must be on cash basis.)

E If private foundation status was terminated under section 507(b)(1)(A), check here

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here

C If exemption application is pending, check here

D 1. Foreign organizations, check here

2. Foreign organizations meeting the 85% test, check here and attach computation

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	3,942	3,942		
	4 Dividends and interest from securities.	48,690	48,690		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a _____				
	7 Capital gain net income (from Part IV , line 2)		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	6,000	6,000		
	12 Total. Add lines 1 through 11	58,632	58,632		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	1,300	1,300		
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	1,071	1,071		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	2,371	2,371		0
	25 Contributions, gifts, grants paid	43,018			43,018
	26 Total expenses and disbursements. Add lines 24 and 25	45,389	2,371		43,018
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	13,243			
	b Net investment income (if negative, enter -0-)		56,261		
	c Adjusted net income (if negative, enter -0-)				

Part II

Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

Assets	1	Cash—non-interest-bearing	38,677	74,120	74,120
	2	Savings and temporary cash investments	128,461	27,486	27,486
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ 100,000 Less allowance for doubtful accounts ▶ _____	100,000	100,000	100,000
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	653,550	884,311	884,311
	c	Investments—corporate bonds (attach schedule).	21,598	53,721	53,721
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	Liabilities	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 the instructions Also, see page 1, item I)	942,286	1,139,638	1,139,638
17		Accounts payable and accrued expenses			
18		Grants payable			
19		Deferred revenue			
20		Loans from officers, directors, trustees, and other disqualified persons			
Net Assets or Fund Balances	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
		Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	942,286	1,139,638	
	30	Total net assets or fund balances (see page 17 of the instructions)	942,286	1,139,638	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	942,286	1,139,638	

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	942,286
2	Enter amount from Part I, line 27a	2	13,243
3	Other increases not included in line 2 (itemize) ▶ _____	3	189,364
4	Add lines 1, 2, and 3	4	1,144,893
5	Decreases not included in line 2 (itemize) ▶ _____	5	5,255
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,139,638

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	CITIGROUP CAPITAL XVI PFD	P	2008-01-23	2009-07-23
b	GABELLI EQUITY TRUST INC	P	2007-12-20	2009-03-26
c	GENL MOTORS ACCEPT 7 375 N	P	2005-09-12	2009-10-29
d	WELLS FARGO CO	P	2008-07-14	2009-10-26
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 17,040		21,950	-4,910
b 2,100		1,849	251
c 17,789		20,210	-2,421
d 8,588		6,763	1,825
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			-4,910
b			251
c			-2,421
d			1,825
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-5,255
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	

Part V

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

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

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

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

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries			
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	41,500	967,292	000 042903
2007	53,196	1,092,094	000 048710
2006	153,256	1,024,137	000 149644
2005	26,467	925,430	000 028600
2004	37,910	1,086,487	000 034892

2 Total of line 1, column (d).	2	000 304749
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	000 060950
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.	4	926,880
5 Multiply line 4 by line 3.	5	56,493
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	563
7 Add lines 5 and 6.	7	57,056
8 Enter qualifying distributions from Part XII, line 4.	8	43,018

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

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

1aExempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)				
bDomestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b			1	1,125
cAll other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			2	
3Add lines 1 and 2.			3	1,125
4Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			4	
5Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-			5	1,125
6Credits/Payments				
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	1,200	
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		
7Total credits and payments Add lines 6a through 6d.			7	1,200
8Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached			8	
9Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			9	
10Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.			10	75
11Enter the amount of line 10 to be Credited to 2010 estimated tax 75 Refunded			11	

Part VII-AStatements Regarding Activities

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

Part VII-A

Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ▶NA				
14	The books are in care of ▶LYNN R DAVIS Telephone no ▶(714) 665-9591			
	Located at ▶1100 IRVINE BLVD 31 TUSTIN CA ZIP+4 ▶92780			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ <input type="checkbox"/>			
	and enter the amount of tax-exempt interest received or accrued during the year ▶	15		

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

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

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to

(1)

Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

Yes

✓

 No

(2)

Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

Yes

✓

 No

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

Yes

✓

 No

(4)

Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions).

Yes

✓

 No

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

Yes

✓

 No

b

If any answer is “Yes” to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?

Organizations relying on a current notice regarding disaster assistance check here.

Yes

c

If the answer is “Yes” to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

Yes

No

If “Yes,” attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

Yes

No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

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

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
LYNN R DAVIS	TRUSTEE 003 00	0		
1100 IRVINE BLVD 31 TUSTIN, CA 92780				
BRENDA S DAVIS	TRUSTEE 001 00	0		
1100 IRVINE BLVD 31 TUSTIN, CA 92780				

2

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances

Total

number of other employees paid over \$50,000.

Part VIII

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation

Total number of others receiving over \$50,000 for professional services. ▶

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

1 NA	0
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

1 NA	
2	
All other program-related investments See page 24 of the instructions	
3	

Total. Add lines 1 through 3. 

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	831,618
b	Average of monthly cash balances.	1b	109,377
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	940,995
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	940,995
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions) 	4	14,115
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	926,880
6	Minimum investment return. Enter 5% of line 5.	6	46,344

Part XI

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

1	Minimum investment return from Part X, line 6.	1	46,344
2a	Tax on investment income for 2009 from Part VI, line 5.	2a	1,125
b	Income tax for 2009 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,125
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	45,219
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	45,219
6	Deduction from distributable amount (see page 25 of the instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	45,219

Part XII

Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26 	1a	43,018
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	43,018
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	43,018
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see page 26 of the instructions)

		(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1	Distributable amount for 2009 from Part XI, line 7				45,219
2	Undistributed income, if any, as of the end of 2008				
a	Enter amount for 2008 only.				
b	Total for prior years 20____, 20____, 20____				
3	Excess distributions carryover, if any, to 2009				
a	From 2004.				
b	From 2005.				
c	From 2006. 103,285				
d	From 2007.				
e	From 2008.				
f	Total of lines 3a through e.	103,285			
4	Qualifying distributions for 2009 from Part XII, line 4 ➤ \$ 43,018				
a	Applied to 2008, but not more than line 2a				
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .				
d	Applied to 2009 distributable amount.				43,018
e	Remaining amount distributed out of corpus				
5	Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	2,201			2,201
6	Enter the net total of each column as indicated below:				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	101,084			
b	Prior years' undistributed income Subtract line 4b from line 2b.				
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d	Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . .				
e	Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				
f	Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8	Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)				
9	Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	101,084			
10	Analysis of line 9				
a	Excess from 2005.				
b	Excess from 2006. 101,084				
c	Excess from 2007.				
d	Excess from 2008.				
e	Excess from 2009.				

Part XIV

Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Part XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

See Additional Data Table

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

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

b

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

c

Any submission deadlines

d

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

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			▶ 3a	43,018
b Approved for future payment				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			14	3,942	
4 Dividends and interest from securities. . . .			14	48,690	
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		
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a <u>INTEREST CAMPFIRE USA</u>			14	6,000	
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e). .				58,632	
13 Total. Add line 12, columns (b), (d), and (e).					58,632

[illegible]

1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash.	1a(1)		No
	(2) Other assets.	1a(2)		No
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
	(3) Rental of facilities, equipment, or other assets.	1b(3)		No
	(4) Reimbursement arrangements.	1b(4)		No
	(5) Loans or loan guarantees.	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No




b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

*****	2010-05-13	*****
Signature of officer or trustee	Date	Title

Paid Preparer's Use Only	Preparer's Signature  DONALD G BERKHEIMER	Date 2010-05-12	Check if self-employed 	Preparer's identifying number (see Signature on page 30 of the instructions)
	Firm's name (or yours if self-employed), address, and ZIP code	DONALD G BERKHEIMER CPA 2362 SABLE TREE CIRCLE TUSTIN, CA 927807125		EIN 
				Phone no (714) 838-3688

Additional Data

Software ID: 09000123
Software Version:
EIN: 77-6183959
Name: BEIGHTLER SQUIRES CHARITABLE TRUST


Part VI Line 7 - Tax Paid Original Return: 1200

Form 990PF Part XV Line 1a - List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000).

LYNN R DAVIS

BRENDA S DAVIS

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
CAMPFIRE USA ORANGE COUNTY COUNCIL1505 E 17TH ST SANTA ANA,CA 92705	NONE	501(C)(3) NPF	EDUCATIONAL PROGRAMS	6,000
RECORDING FOR THE BLIND AND DYSLEXI20 ROZEL RD PRINCETON,NJ 08540	NONE	501(C)(3) NPF	EDUCATIONAL PROGRAMS	10,000
THE PRENTICE SCHOOL18341 LASSEN DR SANTA ANA,CA 92705	NONE	501(C)(3) NPF	EDUCATIONAL PROGRAMS	5,500
KALAMAZOO COLLEGE1200 ACADEMY ST KALAMAZOO,MI 49006	NONE	501(C)(3) NPF	EDUCATIONAL PROGRAMS	8,000
TUSTIN UNIFIED SCHOOL DISTRICT300 S C STREET TUSTIN,CA 92780	NONE	501(C)(3) NPF	EDUCATIONAL PROGRAMS	1,318
CENTER FOR RESTORATIVE JUSTICE WORK5411 CAMELIA AVE NORTH HOLLYWOOD,CA 91601	NONE	501(C)(3) NPF	REDUCTION OF JUVENILE CRIME	1,500
FOOTHILL HIGH SCHOOL PARENT TEACHER19251 DODGE SANTA ANA,CA 92705	NONE	501(C)(3) NPF	EDUCATIONAL PROGRAMS	5,000
CLAREMONT MCKENNA COLLEGE 400 N CLAREMONT BLVD 205 CLAREMONT,CA 91711	NONE	501(C)(3) NPF	EDUCATIONAL PROGRAMS	1,500
ORANGE COUNTY RESCUE MISSIONONE HOPE DR TUSTIN,CA 92780	NONE	501(C)(3) NPF	HUMANITARIAN PROGRAMS	1,000
THE CARTER CENTER453 FREEDOM PARKWAY ATLANTA,GA 30307	NONE	501(C)(3) NPF	HUMANITARIAN PROGRAMS	1,000
AMERICAN FRIENDS SERVICE COMMITTEE634 S SPRING ST LOS ANGELES,CA 90014	NONE	501(C)(3) NPF	HUMANITARIAN PROGRAMS	1,000
SALVATION ARMY10200 PIONEER RD TUSTIN,CA 92780	NONE	501(C)(3) NPF	HUMANITARIAN PROGRAMS	1,000
TUSTIN AREA COUNCIL FOR THE FINE ARPO BOX 145 TUSTIN,CA 92781	NONE	501(C)(3) NPF	DEVELOPMENT OF THE ARTS	200
Total  3a				43,018

TY 2009 Accounting Fees Schedule

Name: BEIGHTLER SQUIRES CHARITABLE TRUST

EIN: 77-6183959

Software ID: 09000123

Software Version: 2009.0.12

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DONALD G BERKHEIMER CPA	1,300	1,300		

TY 2009 General Explanation Attachment**Name:** BEIGHTLER SQUIRES CHARITABLE TRUST**EIN:** 77-6183959**Software ID:** 09000123**Software Version:** 2009.0.12

Identifier	Return Reference	Explanation
		Treatment of Qualifying Distributions Election Pursuant to IRC Section 4942h)2)and Reg 53 4942a)3d)2) the Foundation elects to treat qualifying distributions not treated as made out of the undistributed income of the immediately preceding tax year as made out of undistributed income from the tax year ended December 31 2006

TY 2009 Investments Corporate Bonds Schedule

Name: BEIGHTLER SQUIRES CHARITABLE TRUST

EIN: 77-6183959

Software ID: 09000123

Software Version: 2009.0.12

Name of Bond	End of Year Book Value	End of Year Fair Market Value
GMAC CALL 7.25 08/15/2012 7.25% 08/15/2012	43,655	43,655
CAL ST ANTIC NTS PAYS AT MATURITY 3 3.00% 05/25/2010	10,066	10,066

TY 2009 Investments Corporate
Stock Schedule

Name: BEIGHTLER SQUIRES CHARITABLE TRUST

EIN: 77-6183959

Software ID: 09000123

Software Version: 2009.0.12

Name of Stock	End of Year Book Value	End of Year Fair Market Value
1400 shares of AEGON NV COM	25,068	25,068
1000 shares of AES TRUST III PFD 6.75	46,250	46,250
1300 shares of BAC CAPITAL TRUST VIII GTD COM	24,856	24,856
1000 shares of BANK ONE CAPITAL VI 7.2 PFD	25,130	25,130
3500 shares of CITIGROUP GLOBAL COMMON		
1000 shares of DEUTCHE BANK CAP FUND IX	20,990	20,990
1000 shares of DIAMONDS TRUST SERIES I COM	31,221	31,221
1000 shares of EATON VANCE SR FLTG RATE FD	14,580	14,580
1200 shares of ENTERGY ARKANSAS PFD 6.7 CALLABLE	32,460	32,460
1000 shares of GABELLI EQUITY TR INC PFD 6.2 SER F	25,160	25,160
416 shares of GABELLI EQUITY TR INC PFD CL D	10,209	10,209
1000 shares of GENERAL ELECTRIC CAP CORP 6,625	25,040	25,040
1000 shares of GMAC 7.375 NT PFD 12/16/44		
200 shares of ISHARES SELECT DIVIDEND INDEX FUND	8,782	8,782
300 shares of CONSOLIDATED EDISON	13,629	13,629
350 shares of ISHARES SP 100 INDEX FUND	18,008	18,008
3000 shares of JOHN HANCOCK PFD INCOME II CLOSED	51,090	51,090
600 shares of J P MORGN CHASE CAP PRF CALLABLE	14,358	14,358
1570 shares of PUTNAM MASTER INTER INCOME TR	9,467	9,467
2000 shares of REPOSOL INTL CAP PFD 7.45 SER A	50,500	50,500
1500 shares of ROYCE VALUE TR INC PFD 5.9 PERP CALLAB	36,630	36,630
1250 shares of ROYCE VALUE TR INC COM	24,277	24,277
200 shares of SPDR TR UNIT SER 1	111,440	111,440
1000 shares of VANGUARD LRG CAP ETF MSCI S PRIME MKT	50,670	50,670
1000 shares of WELLS FARGO CAP TR IV PFD 7 SER CALL	25,170	25,170
2000 shares of BANK OF AMERICA CORP PFD	40,400	40,400
300 shares of ISHARES RUSSELL 2000 IDX FUND	18,732	18,732
1000 shares of ING GROEP NV PFD	19,280	19,280
300 shares of ISHARES BARCLAYS TIPS BOND FUND	31,170	31,170
1000 shares of VANGUARD VALUE ETF MSCI US PRIME MKT	47,750	47,750

Name of Stock	End of Year Book Value	End of Year Fair Market Value
300 shares of WELLS FARGO COMPANY COMMON		
700 shares of AMEX SPDR UTILITIES DELECT FUND	21,714	21,714
400 shares of WELLS FARGO COMPANY NON CUM PERP PFD	10,280	10,280

TY 2009 Other Decreases Schedule

Name: BEIGHTLER SQUIRES CHARITABLE TRUST

EIN: 77-6183959

Software ID: 09000123

Software Version: 2009.0.12

Description	Amount
CAPTIAL LOSS	5,255

TY 2009 Other Income Schedule

Name: BEIGHTLER SQUIRES CHARITABLE TRUST

EIN: 77-6183959

Software ID: 09000123

Software Version: 2009.0.12

Description	Revenue And Expenses Per Books	Net Invest ment Income	Adjusted Net Income
INTEREST ON CAMPFIRE NOTE	6,000	6,000	

TY 2009 Other Increases Schedule

Name: BEIGHTLER SQUIRES CHARITABLE TRUST

EIN: 77-6183959

Software ID: 09000123

Software Version: 2009.0.12

Description	Amount
UNREALIZED APPRECIATION	188,889
COST BASIS ADJUSTMENTS TO CAPITAL	475

TY 2009 Other Notes/Loans Receivable Short Schedule

Name: BEIGHTLER SQUIRES CHARITABLE TRUST

EIN: 77-6183959

Software ID: 09000123

Software Version: 2009.0.12

Name of 501(c)(3) Organization	Balance Due
CAMP FIRE USA	
CAMP FIRE USA (RENEWAL)	
CAMP FIRE USA (RENEWAL)	100,000

TY 2009 Taxes Schedule

Name: BEIGHTLER SQUIRES CHARITABLE TRUST

EIN: 77-6183959

Software ID: 09000123

Software Version: 2009.0.12

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Tax on investment income	1,036	1,036	0	0
California Filing Fees	35	35	0	0