

## See a Social Security Number? Say Something! Report Privacy Problems to https://public.resource.org/privacy Or call the IRS Identity Theft Hotline at 1-800-908-4490





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Department of the Treasury Internal Revenue Service

### **Return of Private Foundation**

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

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

OMB No 1545-0052

| For                                   | cale       | ndar year 2009, or tax yea                       | ar beginning                                  |              |                          | , and e                                | nding       |   |   |  |
|---------------------------------------|------------|--|---|--------------|--------------------------|--|-------------|---|---|--|
| G Check all that apply Initial return |            |  | Initial return of a former public charity     |              |                          |  | Final retur | n   |   |  |
|                                       |            |  | Amended return                                |              | Address change           |  |             | Name change   |   |  |
| He                                    | e the      | Name of foundation                               |   |              |                          |  |             | A Employer identification number                      |   |  |
|                                       | label      |  |   |              |                          |  |             |   |   |  |
|                                       | nerwi      |  | . KURTZ FAMI                                  | LY           | FOUNDATIO                | N                                      |             | 84-1067828  | }   |  |
|                                       | print      | Number and street (or P                          | O box number if mail is not d                 | elivered     | to street address)       |  | Room/suite  | B Telephone number                                    |   |  |
|                                       | r typ      | F * O * DOM '                                    | 6227  |              |                          |  |             | 303-320-47  | 704   |  |
|                                       | Spe        | I LIIV OF TOWN STATE 2                           | and ZIP code                                  | -            |                          | <del></del>                            |             | C If exemption application is                         |   |  |
| ms                                    | ructi      | DENVER, CO                                       |   |              |                          |  |             | D 1 Foreign organization                              |   |  |
| Н                                     | Check      | type of organization                             | X Section 501(c)(3) e.                        | cempt        | private foundation       |  |             | Foreign organizations m<br>check here and attach c    | eeting the 85% test,                        |  |
|                                       | _ S€       | ction 4947(a)(1) nonexen                         |   |              | taxable private founda   | ition                                  |             |   |   |  |
| I F                                   | air ma     | arket value of all assets at                     | end of year J Account                         | ng me        | thod X Cash              | Accr                                   | ual         | E If private foundation sta<br>under section 507(b)(1 |   |  |
| (f.                                   | rom .      | Part II, col. (c), line 16)                      |   | her (s       | pecify)                  |  |             | F If the foundation is in a                           |   |  |
|                                       | <b>\$</b>  |  | 7 <b>,</b> 173 <b>.</b> (Part I, colu         | mn (c        | d) must be on cash b     | pasis)                                 |             | under section 507(b)(1                                |   |  |
| P                                     | art I      | Analysis of Revenue ar                           | nd Expenses<br>umns (b), (c), and (d) may not |              | (a) Revenue and          | (b) Net in                             | vestment    | (c) Adjusted net                                      | (d) Disbursements                           |  |
|                                       |            | necessarily equal the amoun                      | nts in column (a) )                           |              | xpenses per books        | inco                                   |             | income  | for chantable purposes<br>(cash basis only) |  |
|                                       | 1          | Contributions, gifts, gran                       | ts, etc , received                            | i            | 42.                      |  |             | N/A   |   |  |
|                                       | 2          | Check X If the foundation                        |   |              |                          |  |             |   |   |  |
|                                       | 3          | Interest on savings and temp<br>cash investments | orary   |              | 251.                     |  | 251.        |   | STATEMENT 1                                 |  |
|                                       | 4          | Dividends and interest fro                       | om securities                                 |              | 2,138.                   |  | 2,138.      |   | STATEMENT 2                                 |  |
|                                       | 5a         | Gross rents                                      |   |              |                          | -                                      |             |   |   |  |
|                                       | b          | Net rental income or (loss)                      |   | <u> </u>     |                          |  |             |   |   |  |
| <u>o</u>                              | 6a         | Net gain or (loss) from sale of                  | assets not on line 10                         |              |                          |  |             |   |   |  |
| Revenue                               | b          | Gross sales price for all assets on line 6a      | ·   |              |                          |  |             |   |   |  |
| ě                                     | 7          | Capital gain net income (from                    | Part IV, line 2)                              |              |                          |  | 0.          |   |   |  |
| ш.                                    | 8          | Net short-term capital ga                        | ın  |              |                          |  |             |   |   |  |
|                                       | 9          | Income modifications Gross sales less returns    | 1   | ļ            |                          |  |             |   |   |  |
|                                       | 10a        | and allowances                                   |   |              |                          |  |             |   |   |  |
|                                       | ł          | Less Cost of goods sold                          |   |              |                          | <del></del>                            |             |   |   |  |
|                                       | C          | Gross profit or (loss)                           |   |              |                          |  |             |   | ,   |  |
|                                       | 11         | Other income                                     |   |              | 0.401                    |  | 0.000       |   |   |  |
| _                                     | 12         | Total Add lines 1 throug                         | <del>'</del>                                  |              | 2,431.                   |  | 2,389°.     |   |   |  |
|                                       | 13         | Compensation of officers, dire                   |   | <u> </u>     | 0.                       |  | 0.          |   | 0.  |  |
|                                       | 14         | Other employee salaries a                        | <u> </u>                                      |              |                          |  |             |   |   |  |
| S                                     | 15         | Pension plans, employee                          | benefits                                      | <u> </u>     |                          |  |             |   |   |  |
| nses                                  | ı          | Legal fees                                       | Cmmm 2  | <b>-</b>     | 1 225                    |  | 1 225       |   |   |  |
| x                                     | i          | Accounting fees                                  | STMT 3  | <u> </u>     | 1,335.                   |  | 1,335.      |   | 0.  |  |
| ii<br>ii                              |            | Other professional fees                          |   |              |                          |  | <del></del> |   |   |  |
| žį                                    | 17         | Interest   | STMT 4  |              | 32.                      |  | 0.          |   | <u> </u>                                    |  |
| Operating and Administrative Expe     | 18<br>19   | Taxes  Depreciation and depletion                |   | <u> </u>     | 32.                      |  | <u> </u>    | <u> </u>  | 0.  |  |
| <u>=</u>                              | 20         |  | Ш   |              | <del></del>              | <del></del>                            |             |   |   |  |
| βq                                    | 21         | Occupancy<br>Travel, conferences, and            | mentings                                      | <del> </del> |                          |  |             |   |   |  |
| ٦                                     | 22         | Printing and publications                        | -   |              |                          |  | <del></del> |   |   |  |
| gar                                   | 23         | Other expenses                                   | STMT 5  | <del></del>  | 65.                      |  | 65.         | <u> </u>  | 0.  |  |
| ţ                                     | l          | Total operating and adm                          |   |              | 03.                      |  | - 05.       | ļ   | <del></del>                                 |  |
| era                                   | 24         | expenses. Add lines 13 t                         |   |              | 1,432.                   |  | 1,400.      |   | 0.  |  |
| õ                                     | 25         | Contributions, gifts, grani                      | •   |              | 3,700.                   | ······································ | _, 100.     |   | 3,700.                                      |  |
|                                       |            | Total expenses and disb                          |   |              | 7                        |  |             |   | 3,700.                                      |  |
| Add loop 24 a                         |            | Add lines 24 and 25                              | WEDEIVED                                      |              | 5,132.                   |  | 1,400.      |   | 3,700.                                      |  |
|                                       | 27         |  | 120   | 8            | 5,102.                   | <del></del>                            | - / •       |   | 3,700.                                      |  |
|                                       | ,          | Excess of revenue over-expen                     | INAY 2 0 2010                                 | Ö            | <2,701.                  | >                                      |             |   |   |  |
|                                       | 1          | Net investment income-                           |   | RS-OSC       |                          | <u> </u>                               | 989.        |   | <del> </del>                                |  |
|                                       |            | Adjusted net income of A                         |   | <b>4</b>     |                          |  |             | N/A   |   |  |
| 9235<br>02-0                          | 01<br>2-10 |  | ind Paperwork Reduction                       | Act N        | otice, see the instructi | ions.                                  |             |   | Form <b>990-PF</b> (2009)                   |  |

| Part II Balance Sheets Attached schedules and amounts in the description                | Beginning of year                     | End of year    |                       |
|---|---------------------------------------|----------------|-----------------------|
| Column should be for end-of-year amounts only   | (a) Book Value                        | (b) Book Value | (c) Fair Market Value |
| 1 Cash - non-interest-bearing   | 70,354.                               | 67,184.        | 67,184                |
| 2 Savings and temporary cash investments  |                                       |                |                       |
| 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  |                                       |                |                       |
| 7 Other notes and loans receivable  |                                       |                |                       |
| Less allowance for doubtful accounts  |                                       | •              |                       |
| 8 Inventories for sale or use 9 Prepaid expenses and deferred charges                   |                                       |                |                       |
| 9 Prepaid expenses and deferred charges   |                                       |                | ····                  |
| 10a Investments - U.S. and state government obligations                                 |                                       |                |                       |
| b Investments - corporate stock STMT 6  | 31,871.                               | 32,340.        | 69,989                |
| c Investments - corporate bonds   |                                       |                | 03,7303               |
| 11 Investments - land buildings, and equipment basis                                    | · · · · · · · · · · · · · · · · · · · |                |                       |
| Less accumulated depreciation   |                                       |                |                       |
| 12 Investments - mortgage loans   |                                       |                |                       |
| 13 Investments - other  |                                       |                |                       |
| 14 Land, buildings, and equipment basis   | ,,                                    |                |                       |
| Less accumulated depreciation   | 1                                     |                |                       |
| 15 Other assets (describe )   |                                       |                |                       |
| 15 Other assets (describe   |                                       |                |                       |
| 16. Total accets (to be accessed to all file in)  | 102 225                               | 00 524         | 127 172               |
| 16 Total assets (to be completed by all filers)   | 102,225.                              | 99,524.        | 137,173               |
| 17 Accounts payable and accrued expenses  |                                       |                |                       |
| 18 Grants payable   |                                       |                |                       |
| 19 Deferred revenue   |                                       |                |                       |
| 20 Loans from officers, directors, trustees, and other disqualified persons             |                                       |                |                       |
| 21 Mortgages and other notes payable  |                                       |                |                       |
| 22 Other liabilities (describe )  |                                       |                |                       |
|   |                                       |                |                       |
| 23 Total liabilities (add lines 17 through 22)  | 0.                                    | 0.             |                       |
| 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                                     | 229,769.                              | 229,812.       |                       |
| 28 Paid-in or capital surplus, or land, bldg, and equipment fund                        | 0.                                    | 0.             |                       |
| 29 Retained earnings, accumulated income, endowment, or other funds                     | <127,544.>                            | <130,288.>     |                       |
| 30 Total net assets or fund balances  | 102,225.                              | 99,524.        |                       |
| DO TOTAL HEL B23613 DI TUNG DATANCES  | 102/223.                              | 77,324.        |                       |
| 31 Total liabilities and net assets/fund balances                                       | 102,225.                              | 99,524.        |                       |
|   |                                       | 33,324.        |                       |
| art III Analysis of Changes in Net Assets or Fund Bal                                   | ances                                 |                |                       |
| Total not access or fund halanges at heavening of year. Best II. column (a) line 20     |                                       |                |                       |
| Total net assets or fund balances at beginning of year - Part II, column (a), line 30   |                                       |                | 100 005               |
| (must agree with end-of-year figure reported on prior year's return)                    |                                       | 1              | 102,225               |
| Enter amount from Part I, line 27a  |                                       | 2              | <2,/01                |
| Other increases not included in line 2 (itemize)  |                                       | 3              | 0                     |
| Add lines 1, 2, and 3   |                                       | 4              | 99,524                |
| Decreases not included in line 2 (itemize)  |                                       | 5              | 0                     |
| Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, colui | mn (b), line 30                       | 6              | 99,524                |

| (a) List and desc<br>2-story brick w   | arehouse,   | nd(s) of property sold (e<br>or common stock, 200 s  | shs MLC Co)   |  | (b) How<br>P - Pu<br>D - Do                      | rchase<br>nation                                     | (c) Date acquire<br>(mo , day, yr )                 |         | (d) Date sold<br>(mo , day, yr )                      |
|--|---|--|---|--|--|--|---|---------|---|
| 1a   |   |  |   |  |  |  |   |         |   |
| b NC   | NE  |  | ··-   |  |  |  |   |         |   |
| <u>C</u>   |   |  |   |  | <u> </u>   |  |   | _       |   |
| e e  |   |  |   |  | -  | _  |   | +       |   |
|  | (f) [   | Depreciation allowed   | (n) Co  | st or other basis  | <del>'                                    </del> |  | (h) Gain or (                                       | loco)   | · · · · · · · · · · · · · · · · · · ·                 |
| (e) Gross sales price  |   |  | expense of sale   | Ì  |  | (e) plus (f) mil                                     |   | )       |   |
| a  |   |  |   |  |  |  |   |         |   |
| b  |   |  |   |  | -  |  |   |         |   |
| <u>C</u>   | ļ   |  | -   |  |  |  | · · · · · · · · · · · · · · · · · · ·               |         |   |
| <u>d</u>   | <u> </u>  |  |   |  |  |  | <del></del>   |         |   |
| Complete only for assets show  | no oain in e  | column (h) and owned h   | y the foundation  | n n 12/31/60   |  | 41   | Cours (Cal. (b)                                     |         |   |
| (i) F M V as of 12/31/69   | 1   | j) Adjusted basis<br>as of 12/31/69  | (k) E>  | cess of col (I)  |  | col  | Gains (Col. (h) (k), but not less<br>Losses (from c | than -  | ·0-) or   |
| a  |   |  |   |  |  |  |   |         |   |
| b  |   |  |   |  |  |  |   |         |   |
| C  |   |  |   |  |  |  |   |         |   |
| d  | <u> </u>  |  |   |  |  |  |   |         |   |
| <u>e</u>   | <u> </u>  | <del></del>  |   |  |  | 1  |   |         |   |
| 2 Capital gain net income or (net c  | apital loss)  | { If gain, also enter defined to the left of the left  | ter in Part I, line<br>+0+ in Part I, line  | 7<br>7   | } 2  |  |   |         |   |
| 3 Net short-term capital gain or (lo   | cc) ac dafu   | ned in sections 1222/5)  | and (6)   |  | ٦  |  |   |         |   |
| If gain, also enter in Part I, line 8  | , column (c   |  | (-)   |  | <b>b</b> l                                       |  |   |         |   |
| If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 Part V Qualification L (For optional use by domestic private  | , column (c<br>Jnder S<br>e foundation  | ection 4940(e) for<br>ons subject to the section   | or Reduced  |  |  | ment inc   | ome   |         |   |
| If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 Part V Qualification U (For optional use by domestic privat If section 4940(d)(2) applies, leave t Was the foundation liable for the section "Yes," the foundation does not qual  | , column (column)  Jnder S  e foundation  this part blaction 4942  elify under s  | ection 4940(e) for one subject to the section ank tax on the distributable a section 4940(e) Do not  | or Reduced<br>n 4940(a) tax on<br>amount of any yo<br>complete this pa                                    | net investment i<br>ear in the base pe<br>irt                    | riod?  | ment Inc   | ome   |         | Yes X No  |
| If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 Part V Qualification L  (For optional use by domestic privat If section 4940(d)(2) applies, leave t  Was the foundation liable for the sectif "Yes," the foundation does not qual  Enter the appropriate amount in  | , column (column)  Jnder S  e foundation  this part blaction 4942  elify under s  | ection 4940(e) for one subject to the section ank tax on the distributable a section 4940(e). Do not one for each year, see ins  | or Reduced<br>n 4940(a) tax on<br>amount of any yo<br>complete this pa                                    | net investment i<br>ear in the base pe<br>irt                    | riod?  | ment Inc   | ome   |         |   |
| If gain, also enter in Part I, line 8  If (loss), enter -0- in Part I, line 8  Part V Qualification U  (For optional use by domestic private if section 4940(d)(2) applies, leave to the section 4940(d)(2) applies, leave to the foundation does not qual 1 Enter the appropriate amount in (a)  Base period years  | Jnder S Jnder S Se foundation this part blaction 4942 each column   | ection 4940(e) for one subject to the section ank tax on the distributable a section 4940(e) Do not  | or Reduced<br>in 4940(a) tax on<br>amount of any you<br>complete this pa<br>structions before             | net investment i<br>ear in the base pe<br>irt                    | riod?  |  | D   | stribul | i)  |
| If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 Part V Qualification L  (For optional use by domestic private If section 4940(d)(2) applies, leave to Was the foundation liable for the sectif "Yes," the foundation does not qual Enter the appropriate amount in  | Jnder S Jnder S Se foundation this part blaction 4942 each column   | ection 4940(e) for subject to the section ank tax on the distributable a section 4940(e). Do not on for each year, see ins   | or Reduced<br>in 4940(a) tax on<br>amount of any you<br>complete this pa<br>structions before             | net investment i<br>ear in the base pe<br>irt<br>making any entr | riod?<br>es<br>(c)<br>oncharitabl                |  | Dı<br>(col (b                                       | stribul | i)<br>lion ratio<br>ed by col (c))                    |
| If gain, also enter in Part I, line 8  If (loss), enter -0- in Part I, line 8  Part V Qualification U  (For optional use by domestic private if section 4940(d)(2) applies, leave to was the foundation liable for the sectif "Yes," the foundation does not qualification to the appropriate amount in a section (a)  Base period years Calendar year (or tax year beginn)  | Jnder S Jnder S Se foundation this part blaction 4942 each column   | ection 4940(e) for one subject to the section ank tax on the distributable a section 4940(e). Do not one for each year, see insection 4940(e). Adjusted qualifying decreases   | amount of any your complete this partiructions before distributions 4,965.                                | net investment i<br>ear in the base pe<br>irt<br>making any entr | riod? es (c) oncharitable                        | e-use assets<br>43,060<br>36,090                     | (col (b   | stribul | t) ion ratio ed by col (c))                           |
| If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 Part V Qualification L (For optional use by domestic private If section 4940(d)(2) applies, leave to Was the foundation liable for the sectif "Yes," the foundation does not qual Enter the appropriate amount in  (a) Base period years Calendar year (or tax year beginn 2008 2007 2006   | Jnder S Jnder S Se foundation this part blaction 4942 each column   | ection 4940(e) for one subject to the section ank tax on the distributable a section 4940(e). Do not one for each year, see ins.  (b)  Adjusted qualifying december 1940(e).   | amount of any your complete this particularies before 4,965. 12,689. 5,496.                               | net investment i<br>ear in the base pe<br>irt<br>making any entr | riod? es (c) oncharitable 1                      | e-use assets<br>43,060<br>36,090<br>52,269           | Col (b  | stribul | 1) clon ratio ed by col (c))                          |
| If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 Part V Qualification L  (For optional use by domestic private If section 4940(d)(2) applies, leave to Was the foundation liable for the sectif "Yes," the foundation does not qual Enter the appropriate amount in (a) Base period years Calendar year (or tax year beginn 2008 2007 2006 2005  | Jnder S Jnder S Se foundation this part blaction 4942 each column   | ection 4940(e) for one subject to the section ank tax on the distributable a section 4940(e). Do not one for each year, see ins.  (b)  Adjusted qualifying december 1940(e).   | amount of any your complete this particuctions before distributions 4,965. 12,689. 5,496. 70,309.         | net investment i<br>ear in the base pe<br>irt<br>making any entr | riod? es (c) oncharitable                        | e-use assets<br>43,060<br>36,090<br>52,269<br>75,578 | (col (b   | stribul | 1) Ilon ratio ed by col (c))  .03470 .093240 .036094  |
| If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 Part V Qualification L (For optional use by domestic private If section 4940(d)(2) applies, leave to Was the foundation liable for the sectif "Yes," the foundation does not qual Enter the appropriate amount in  (a) Base period years Calendar year (or tax year beginn 2008 2007 2006   | Jnder S Jnder S Se foundation this part blaction 4942 each column   | ection 4940(e) for one subject to the section ank tax on the distributable a section 4940(e). Do not one for each year, see ins.  (b)  Adjusted qualifying december 1940(e).   | amount of any your complete this particularies before 4,965. 12,689. 5,496.                               | net investment i<br>ear in the base pe<br>irt<br>making any entr | riod? es (c) oncharitable                        | e-use assets<br>43,060<br>36,090<br>52,269           | (col (b   | stribul | 1) Ilon ratio ed by col (c))  .034706 .093246 .036094 |
| If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 Part V Qualification U (For optional use by domestic private of the section 4940(d)(2) applies, leave to the section 4940(d)(d)(d)(d)(d)(d)(d)(d)(d)(d)(d)(d)(d)(   | Jnder S Jnder | ection 4940(e) for one subject to the section ank tax on the distributable a section 4940(e). Do not one for each year, see ins.  (b)  Adjusted qualifying december 1940(e).   | amount of any your complete this particuctions before distributions 4,965. 12,689. 5,496. 70,309.         | net investment i<br>ear in the base pe<br>irt<br>making any entr | riod? es (c) oncharitable                        | e-use assets<br>43,060<br>36,090<br>52,269<br>75,578 | Di (col (b  | stribul | 1)  |
| If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 Part V Qualification U (For optional use by domestic privat If section 4940(d)(2) applies, leave t Was the foundation liable for the sec If "Yes," the foundation does not qua 1 Enter the appropriate amount in (a) Base period years Calendar year (or tax year beginn 2008 2007 2006 2005 2004  2 Total of line 1, column (d)  | Jnder S e foundation this part blaction 4942 each coluring in)  | ection 4940(e) for one subject to the section ank tax on the distributable a section 4940(e). Do not one for each year, see ins.  (b)  Adjusted qualifying d   | amount of any your complete this partiructions before distributions 4,965. 12,689. 5,496. 70,309. 12,619. | ear in the base pe<br>ear<br>making any entr                     | riod? es (c) oncharitable 1 1 1                  | e-use assets<br>43,060<br>36,090<br>52,269<br>75,578 | (col (b   | stribul | 1)  |
| If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 Part V Qualification U (For optional use by domestic private of the section 4940(d)(2) applies, leave to the section 4940(d)(d)(d)(d)(d) applies, leave to the section 4940(d)(d)(d)(d)(d)(d)(d)(d)(d)(d)(d)(d)(d)(  | Jnder S e foundation this part blaction 4942 each columing in)  | ection 4940(e) for one subject to the section ank tax on the distributable a section 4940(e). Do not one for each year, see ins.  (b)  Adjusted qualifying delete to be period - divide the total  | amount of any your complete this partiructions before distributions 4,965. 12,689. 5,496. 70,309. 12,619. | ear in the base pe<br>ear<br>making any entr                     | riod? es (c) oncharitable 1 1 1                  | e-use assets<br>43,060<br>36,090<br>52,269<br>75,578 | Di (col (b  | stribul | d) ilon ratio ed by col (c))                          |
| If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 Part V Qualification L  (For optional use by domestic private if section 4940(d)(2) applies, leave to the section of the sec | Jnder S e foundation this part blaction 4942 elify under s each columing in)  5-year basence if less  | ection 4940(e) for one subject to the section ank tax on the distributable a section 4940(e). Do not one for each year, see ins (b). Adjusted qualifying dependent of the period - divide the total than 5 years.  | amount of any your complete this partiructions before distributions 4,965. 12,689. 5,496. 70,309. 12,619. | ear in the base pe<br>ear<br>making any entr                     | riod? es (c) oncharitable 1 1 1                  | e-use assets<br>43,060<br>36,090<br>52,269<br>75,578 | Cool (b   | stribul | 1)  |
| If gain, also enter in Part I, line 8  If (loss), enter -0- in Part I, line 8  Part V Qualification U  For optional use by domestic private f section 4940(d)(2) applies, leave to five foundation liable for the sect fives," the foundation does not qual Enter the appropriate amount in (a)  Base period years Calendar year (or tax year beginn 2008  2007  2006  2007  2006  2004  2 Total of line 1, column (d)  A Average distribution ratio for the the foundation has been in exister the net value of noncharital section.  | Jnder S e foundation this part blaction 4942 elify under s each columing in)  5-year basence if less  | ection 4940(e) for one subject to the section ank tax on the distributable a section 4940(e). Do not one for each year, see ins (b). Adjusted qualifying dependent of the period - divide the total than 5 years.  | amount of any your complete this partiructions before distributions 4,965. 12,689. 5,496. 70,309. 12,619. | ear in the base pe<br>ear<br>making any entr                     | riod? es (c) oncharitable 1 1 1                  | e-use assets<br>43,060<br>36,090<br>52,269<br>75,578 | Col (b  | stribul | 1)  |
| If gain, also enter in Part I, line 8  If (loss), enter -0- in Part I, line 8  Part V Qualification L  For optional use by domestic private f section 4940(d)(2) applies, leave to five foundation liable for the section 4940(d)(2) applies, leave to five fives, the foundation does not qualification to five fives, the foundation does not qualificate for the appropriate amount in (a)  Base period years Calendar year (or tax year beginn 2008 2007 2006 2005 2004  Total of line 1, column (d)  Average distribution ratio for the the foundation has been in existed the foundation has been in existed Multiply line 4 by line 3   | Jnder S e foundation this part blaction 4942 elify under s each columing in)  5-year basence if less ble-use ass  | ection 4940(e) for one subject to the section ank tax on the distributable a section 4940(e). Do not one for each year, see ins.  (b)  Adjusted qualifying description of the experion of the  | amount of any your complete this partiructions before distributions 4,965. 12,689. 5,496. 70,309. 12,619. | ear in the base pe<br>ear<br>making any entr                     | riod? es (c) oncharitable 1 1 1                  | e-use assets<br>43,060<br>36,090<br>52,269<br>75,578 | Di (col (b  | stribul | 1)  |
| If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 Part V Qualification L (For optional use by domestic private of the section 4940(d)(2) applies, leave to the section of the  | Jnder S e foundation this part blaction 4942 elify under s each columing in)  5-year basence if less ble-use ass  | ection 4940(e) for one subject to the section ank tax on the distributable a section 4940(e). Do not one for each year, see ins.  (b)  Adjusted qualifying description of the experion of the  | amount of any your complete this partiructions before distributions 4,965. 12,689. 5,496. 70,309. 12,619. | ear in the base pe<br>ear<br>making any entr                     | riod? es (c) oncharitable 1 1 1                  | e-use assets<br>43,060<br>36,090<br>52,269<br>75,578 | 2<br>3<br>4   | stribul | 1)  |
| If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8 Part V Qualification L (For optional use by domestic private of the section 4940(d)(2) applies, leave to the section 4940(d)(d)(d)(d)(d)(d)(d)(d)(d)(d)(d)(d)(d)(   | Jnder S e foundation this part blaction 4942 elify under s each colur ing in)  5-year bas ence if less ble-use ass  | ection 4940(e) for one subject to the section ank tax on the distributable a section 4940(e). Do not one for each year, see ins.  (b)  Adjusted qualifying description of the eperiod of the epiperiod of the eperiod of the eperiod of the eperiod of the epiperiod of | amount of any your complete this partiructions before distributions 4,965. 12,689. 5,496. 70,309. 12,619. | ear in the base pe<br>ear<br>making any entr                     | riod? es (c) oncharitable 1 1 1                  | e-use assets<br>43,060<br>36,090<br>52,269<br>75,578 | 2<br>3<br>4<br>5                                    | stribul | i)  |

| Forn | n 990-PF (2009) CHARLES H. KURTZ FAMILY FOUNDATION 84-106  |               |   | Page 4   |
|------|--|---------------|---|----------|
| Pa   | art VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see   | instrı        | ıctio                                   | ns)      |
| 1a   | Exempt operating foundations described in section 4940(d)(2), check here  and enter "N/A" on line 1  | -             |   |          |
|      | Date of ruling or determination letter (attach copy of letter if necessary-see instructions)   |               |   |          |
| b    | Domestic foundations that meet the section 4940(e) requirements in Part V, check here  and enter 1%  |               |   | 20.      |
|      | of Part I, line 27b  |               |   |          |
| C    | All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)                      |               |   |          |
|      | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)                                    |               |   | 0.       |
|      | Add lines 1 and 2  |               |   | 20.      |
| 4    | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)                                  |               | *************************************** | 0.       |
| 5    | Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-   |               |   | 20.      |
| 6    | Credits/Payments   |               |   |          |
| а    | 2009 estimated tax payments and 2008 overpayment credited to 2009 6a 6   |               |   |          |
| b    | Exempt foreign organizations - tax withheld at source  |               |   |          |
| C    | Tax paid with application for extension of time to file (Form 8868)  |               |   |          |
| đ    | Backup withholding erroneously withheld 6d   |               |   |          |
| 7    | Total credits and payments Add lines 6a through 6d   |               |   | 0.       |
| 8    | Enter any penalty for underpayment of estimated tax. Check here 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   ▶ g  |               |   | 20.      |
| 10   | Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid  |               |   |          |
|      | Enter the amount of line 10 to be Credited to 2010 estimated tax ▶ Refunded ▶ 11   |               |   |          |
| Pa   | art VII-A Statements 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 |               | Yes                                     | No       |
|      | any political campaign?  | 1a            |   | Х        |
| b    | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?       | 1b            |   | X        |
|      | 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  |               |   |          |
| C    | : Did the foundation file Form 1120-POL for this year?   | 10            | ŀ                                       | x        |
|      | Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year  |               |   |          |
|      | (1) On the foundation ► \$ 0 • (2) On foundation managers ► \$ 0 •   |               |   |          |
| е    | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation                  |               |   |          |
|      | managers ▶ \$ 0.   |               |   |          |
| 2    | Has the foundation engaged in any activities that have not previously been reported to the IRS?  | 2             |   | Х        |
|      | If "Yes," attach a detailed description of the activities  |               |   | 1        |
| 3    | Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or          |               |   |          |
|      | bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes   | 3             |   | Х        |
| 4 a  | Did the foundation have unrelated business gross income of \$1,000 or more during the year?  | 4a            |   | X        |
|      | ı If "Yes," has it filed a tax return on Form 990-T for this year?   | 4b            |   |          |
| 5    | Was there a liquidation, termination, dissolution, or substantial contraction during the year?   | 5             |   | X        |
|      | If "Yes," attach the statement required by General Instruction T   | ,             |   |          |
| 6    | Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either   |               |   |          |
|      | 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             | Х                                       | 1        |
| 7    | Did the foundation have at least \$5,000 in assets at any time during the year?  | 7             | Х                                       | <u> </u> |
|      | If "Yes," complete Part II, col. (c), and Part XV  |               |   |          |
| 8a   | Enter the states to which the foundation reports or with which it is registered (see instructions)   | 1             |   |          |
|      | CO   |               |   |          |
| 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)                  | 1             |   |          |
|      | of each state as required by General Instruction G? If "No," attach explanation  | 8b            | Х                                       | 1        |
| 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)? If "Yes," complete Part XIV                                 | 9             |   | x        |
| 10   | Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses           | 10            |   | X        |
|      | · · · · · · · · · · · · · · · · · · ·  | rm <b>990</b> | -PF                                     | (2009)   |

| 11 |   | Х |
|----|---|---|
| 12 |   | Х |
| 13 | X |   |

Page 5

| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exe | emption application? |
|----|--|----------------------|
|    | Website address ► N/A  |                      |
| 14 | The books are in care of ▶ CHARLES H. KURTZ  | Tele                 |

Telephone no  $\triangleright 303 - 320 - 4704$ ZIP+4  $\triangleright 80206$ 

Located at ► 123 MADISON ST. #101, DENVER, CO

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here

had not been removed from jeopardy before the first day of the tax year beginning in 2009?

12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before

section 512(b)(13)? If "Yes," attach schedule (see instructions)

August 17, 20082

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) Yes X No (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) Yes X No a disqualified person? Yes X No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available Yes X No for the benefit or use of a disqualified person)? (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 Yes X No termination of government service, if terminating within 90 days ) b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations N/A section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? 1b Organizations relying on a current notice regarding disaster assistance check here 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 Х before the first day of the tax year beginning in 2009? 10 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 \_ Yes X No before 2009? If "Yes," list the years ▶ 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 N/A statement - see 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 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time Yes X No during the year? 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, N/A Form 4720, to determine if the foundation had excess business holdings in 2009.) 3b X 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that

Form **990-PF** (2009)

4h

Х

| Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)  | on Managers, Highly       |                                       |
|--|---------------------------|---------------------------------------|
| 3 Five highest-paid independent contractors for professional services. If none, enter "N   | NONE."                    | ····                                  |
| (a) Name and address of each person paid more than \$50,000  | (b) Type of service       | (c) Compensation                      |
| NONE   |                           |                                       |
|  |                           |                                       |
|  |                           |                                       |
|  |                           |                                       |
|  |                           |                                       |
|  |                           |                                       |
|  |                           |                                       |
|  |                           |                                       |
|  |                           |                                       |
| Total number of others receiving over \$50,000 for professional services   |                           | ▶ 0                                   |
| Part IX-A Summary of Direct Charitable Activities  |                           | <del></del>                           |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistica number of organizations and other beneficiaries served, conferences convened, research papers produce | I information such as the | Expenses                              |
| 1 N/A  | ed, etc                   |                                       |
| I IV/ A  |                           |                                       |
|  |                           |                                       |
| 2  |                           |                                       |
|  |                           |                                       |
|  |                           |                                       |
| 3  |                           |                                       |
|  |                           |                                       |
| A  |                           | <u> </u>                              |
| 4  |                           |                                       |
|  |                           |                                       |
| Part IX-B Summary of Program-Related Investments   |                           |                                       |
| Describe the two largest program-related investments made by the foundation during the tax year on line  | es 1 and 2                | Amount                                |
| 1 N/A  |                           | · · · · · · · · · · · · · · · · · · · |
|  |                           |                                       |
|  |                           |                                       |
| 2  |                           |                                       |
|  |                           |                                       |
| All other program-related investments. See instructions  |                           |                                       |
| 3  |                           |                                       |
| T  |                           |                                       |
|  |                           |                                       |
| Total. Add lines 1 through 3   | <b>&gt;</b>               | 0.                                    |
|  |                           | Form <b>990-PF</b> (2009)             |

| P  | art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four   | ndations, | see instructions)                       |
|----|---|-----------|---|
| 1  | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes  |           |   |
| а  | Average monthly fair market value of securities   | 1a        | 63,501.                                 |
|    | Average of monthly cash balances  | 1b        | 63,501.<br>68,283.                      |
|    | Fair market value of all other assets   | 10        |   |
| d  |   | 1d        | 131,784.                                |
| е  | Reduction claimed for blockage or other factors reported on lines 1a and  | 10        |   |
|    | 1c (attach detailed explanation) 1e 0.  |           |   |
| 2  | Acquisition indebtedness applicable to line 1 assets  | 2         | 0.                                      |
| 3  | Subtract line 2 from line 1d  | 3         | 131,784.                                |
| 4  | Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)  | 4         | 1,977.                                  |
| 5  | Net value of noncharitable-use assets Subtract line 4 from line 3 Enter here and on Part V, line 4  | 5         | 129,807.                                |
| 6  | Minimum investment return. Enter 5% of line 5   | 6         | 6,490.                                  |
| P  | art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here  and do not complete this part ) |           |   |
| 1  | Minimum investment return from Part X, line 6   | 1         | 6,490.                                  |
| 2a | Tax on investment income for 2009 from Part VI, line 5  |           | • |
| b  | Income tax for 2009 (This does not include the tax from Part VI )   |           |   |
| C  | Add lines 2a and 2b   | 2c        | 20.                                     |
| 3  | Distributable amount before adjustments. Subtract line 2c from line 1   | 3         | 6,470.                                  |
| 4  | Recoveries of amounts treated as qualifying distributions   | 4         | 0.                                      |
| 5  | Add lines 3 and 4   | 5         | 6,470.                                  |
| 6  | Deduction from distributable amount (see instructions)  | 6         | 0.                                      |
| 7  | Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1   | 7         | 6,470.                                  |
| P  | art XII Qualifying Distributions (see instructions)   |           |   |
| 1  | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes   |           | <del></del>                             |
| а  | Expenses, contributions, gifts, etc - total from Part I, column (d), line 26  | 1a        | 3,700.                                  |
| b  | Program-related investments - total from Part IX-B  | 1b        | 3,700.                                  |
| 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   |           | · · · · · · · · · · · · · · · · · · ·   |
| а  | 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         | 3,700.                                  |
| 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   | 5         | 0.                                      |
| 6  | Adjusted qualifying distributions. Subtract line 5 from line 4  | 6         | 3,700.                                  |
|    | Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of   |           | <del></del>                             |
|    | 4940(e) reduction of tax in those years   |           |   |

# Part XIII Undistributed Income (see instructions)

| 1 Oestrotubble amount for 2009 from Part XI, Intel® 7 2 Limesteducted recent, all any, as of the earl of 2009 at Enter amount for 2008 only 1958 b. Terral from 2004 1 1, 958 b. From 2005 62, 298 b. From 2006 67 only 2009 af From 2006 1 1, 958 b. From 2006 67 only 2009 af From 2006 62 only 2009 af From 2006 62 only 2009 af From 2006 62 only 2009 af From 2006 60 only 2009 af From 2008 1 only 2009 af From 2008 1 only 2009 af From 2008 1 only 2009 af From 2009 2009 a |  | (a)<br>Corpus                           | (b)<br>Years prior to 2008 | (c)<br>2008                           | (d)<br>2009                             |
|--|--|---|----------------------------|---------------------------------------|---|
| 2 Uncashbodel scene, of any, as of the and of 2009 a Enter amount for 2008 only b Total for prior years  3 Excess distributions carryover, if any, to 2009 a From 2004 1, 95.8 b From 2005 62, 79.8 b From 2005 62, 79.8 c From 2006 75.9 9.3 l e From 2006 75.9 9.3 l e From 2008 1 Total of lens 3a through e 70, 18.7 c From 2008 1 Total of lens 3a through e 70, 18.7 c From 2008 1 Total of lens 3a through e 70, 18.7 c From 2008 1 Total of lens 3a through e 70, 18.7 c From 2008 1 Total of lens 3a through e 70, 18.7 c From 2008 1 Total of lens 3a through e 70, 18.7 c From 2008 1 Total of lens 3a through e 70, 18.7 c From 2008 1 Total of lens 3a through e 70, 18.7 c From 2008 1 Total of lens 3a through e 70, 18.7 c From 2008 1 Total of lens 3a through e 70, 18.7 c From 2008 1 Total of lens 3a through e 70, 18.7 c From 2008 1 Total of lens 4a from lens 2a   | · •  |   |                            |                                       |   |
| a Enter amount for 2008 only   |  | ·                                       | 1-1' 1-1-111- 1-1          |                                       | 0,470.                                  |
| 3 Excess distributions carryover, if any, to 2009 a From 2005  | <b>.</b>   |   |                            | 0 -                                   |   |
| 3 Excess distributions carryover, if any, to 2009 a From 2004  | ·  |   | <del></del>                |                                       |   |
| 3 Excess distributions carryover, if any, to 2009 a From 2004  |  |   | 0.                         |                                       |   |
| b From 2005   52,298.  | 3 Excess distributions carryover, if any, to 2009    | *************************************** | 7777                       |                                       | <del></del>                             |
| b From 2005   52,298.  | a From 2004 1,958.                                   |   |                            |                                       |   |
| E From 2006  If Total of lines 3a through e  4 Cualifying distributions for 2008 from Part XII, line 4 ► \$ 3,700.  3 Applied to 2008, but not more than line 2a  Applied to misstributed income of prior years (Election required - see instructions)  C Treated as distributions out of corpus (Election required - see instructions)  C Applied to 2008 distributable amount Remaining amount distributed out of corpus (Election required - see instructions)  C Applied to 2009 distributable amount Remaining amount distributed out of corpus (Election required - see instructions)  C Applied to 2009 distributable amount Remaining amount distributed out of corpus (I am amount speese in obturn 6k, line amount amount should not a see instructions)  E bross distributions carryover applied to 2009 (I am amount speese in obturn 6k, line amount amount instruction of the amount out of the amount out of the amount out of the amount out of the amount of prior years' undistributed income for which a notice of undistributed income for which a notice of undistributed income for which a notice of undistributed income for 2008 Subtract lines and anount - see instructions  B Undistributed income for 2008 Subtract lines 4d and 5 from line 1 This amount must be distributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010  A mounts treated as distributions out of corpus to salkir equirements imposed by section 170(b)(1)(7) or 4942(g)(3)  B Excess from 2005  C 1, 486.  B Excess from 2006  A provided and 5 from line 6  Analysis of line 9  a Excess from 2005  B Excess from 2006  C 2, 770.  O 2  O 3, 770.  O 4  O 4  O 5  O 6  O 7, 417.  O 6  O 7, 417.  | b From 2005 62,298.                                  |   |                            |                                       |   |
| E From 2008  1 Total of lines 3 at brough e  4 Cualifying distributions for 2009 from Part XII, line 4 ► \$ 3,700.  A popied to 2008, but not more than line 2a  D Appleed to undistributed income of prior years (Election required - see instructions) (Election required - see instructions) (Election required - see instructions) (A popied to 2009 distributable amount e Remaining amount distributed out of corpus  5 Excess distributions carryover applied to 2009  2,7770.  3,700.  4 Occupation of the service instruction of the service  |  | -                                       |                            |                                       |   |
| E From 2008  1 Total of lines 3 at brough e  4 Cualifying distributions for 2009 from Part XII, line 4 ► \$ 3,700.  A popied to 2008, but not more than line 2a  D Appleed to undistributed income of prior years (Election required - see instructions) (Election required - see instructions) (Election required - see instructions) (A popied to 2009 distributable amount e Remaining amount distributed out of corpus  5 Excess distributions carryover applied to 2009  2,7770.  3,700.  4 Occupation of the service instruction of the service  | d From 2007 5,931.                                   |   |                            |                                       |   |
| 4 Ouallying distributions for 2009 from Part XII, line 4 ► \$ 3,700.  A pipel to 2008, but not more than line 2a b Appled to 2009, but not more than line 2a b Appled to undistributed income of prior years (Election required - see instructions) concept (Election required - see instructions) do a Appled to 2009 distributable amount e Remaining amount distributed out of corpus (Election required - see instructions) do a Appled to 2009 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applies to 2009 and in a minural appears in column (a) in the same emount must be about in column (a) in a minural appears in column (a) in the same emount must be about in column as indicated below:  3 Corpus And insol 4.c. and 4e Subtract line 5 D Prior years' undistributed income Subtract line 4b from line 2b C C Eleter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 494(2) at x has been previously assessed  3 Subtract line 6c from line 6b Taxable amount - see inistricutions e undistributed income for 2009 Subtract line 4a from line 2a Taxable amount - see inistricutions e undistributed in 2010 O.  4 Undistributed in 2010 O.  5 Excess distributions carryover to 2009 Subtract line 4a from line 2 Taxable amount - see inistricutions e undistributed in 2010 O.  6 Amounts tracted as distributions out of corpus to sabsty requirements imposed by section 170(b)(1)(F) or 4942(b)(3) O.  6 Excess distributions carryover to 2010.  8 Excess distributions carryover to 2010.  9 Excess from 2005 61, 486.  9 Excess from 2006 61, 486.   |  |   |                            |                                       |   |
| 4 Ouallying distributions for 2009 from Part XII, line 4 ► \$ 3,700.  A pipel to 2008, but not more than line 2a b Appled to 2009, but not more than line 2a b Appled to undistributed income of prior years (Election required - see instructions) concept (Election required - see instructions) do a Appled to 2009 distributable amount e Remaining amount distributed out of corpus (Election required - see instructions) do a Appled to 2009 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applies to 2009 and in a minural appears in column (a) in the same emount must be about in column (a) in a minural appears in column (a) in the same emount must be about in column as indicated below:  3 Corpus And insol 4.c. and 4e Subtract line 5 D Prior years' undistributed income Subtract line 4b from line 2b C C Eleter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 494(2) at x has been previously assessed  3 Subtract line 6c from line 6b Taxable amount - see inistricutions e undistributed income for 2009 Subtract line 4a from line 2a Taxable amount - see inistricutions e undistributed in 2010 O.  4 Undistributed in 2010 O.  5 Excess distributions carryover to 2009 Subtract line 4a from line 2 Taxable amount - see inistricutions e undistributed in 2010 O.  6 Amounts tracted as distributions out of corpus to sabsty requirements imposed by section 170(b)(1)(F) or 4942(b)(3) O.  6 Excess distributions carryover to 2010.  8 Excess distributions carryover to 2010.  9 Excess from 2005 61, 486.  9 Excess from 2006 61, 486.   | f Total of lines 3a through e                        | 70,187.                                 |                            |                                       |   |
| a Applied to 2008, but not more than line 2a b Applied to undistributed income of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2009 distributable amount e Remaining amount distributed out of corpus  5 Excess distributions carryover applied to 2009  1 Excess distributed income for 2001  2 C T770 .  2 C T770 .  3 T770 .  2 T770 .  2 T770 .  2 T770 .  3 T770 .  5 Excess distributed income for common (a) included below:  1 C Circles And lines 3t, 4c, and 4e Subtract line 5 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 sisted or on which the section 4942(a) tax has been previously assessed  3 Subtract line 6c from line 6b Taxable amount - see instrictions e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instrictions e Undistributed income for 2008 Subtract line 4a from line 2 Taxable amount - see instrictions e Undistributed income for 2008 Subtract line 4a from line 2 Taxable amount - see instrictions e Undistributed income for 2008 Subtract line 4a from line 1 This amount must be distributed in 2010  A mounts treated as distributions out of corpus to satisfy requirements imposed by section 170(h(1)(f) or 4942(h)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess from 2005 6 1, 486 - b Excess from 2006   | 4 Qualifying distributions for 2009 from             |   |                            |                                       | *************************************** |
| a Applied to 2008, but not more than line 2a b Applied to indistributed income of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2009 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions campover applied to 2005 must be shown in calcium (a) 6 Enter the net lotal of each column as indicated below: a Corpus And lines 3i, 4c, and 4e Subtract time 5 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 sisted or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b Taxable amount - see instructions e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instructions e Undistributed income for 2008 Subtract line 4a from line 2 Taxable amount - see instructions e Undistributed income for 2008 Subtract line 4a from line 2 Taxable amount - see instructions e Undistributed income for 2008 Subtract line 4a from line 1 This amount must be distributed in 2010  A Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(h(1)(f) or 4942(n)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess from 2005 6 1, 486 - b Excess from 2005 6 1, 486 - b Excess from 2006   | Part XII, line 4 ▶ \$ 3,700.                         |   |                            |                                       |   |
| years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2009 distributable amount e Remaining amount distributed out of corpus Excess distributions carryover plane to 2009 (If an amount appears in column (cl), the same amount must be shown in column (cl).  2 Corpus Acid lines 31, 4c, and 4e Subtract line 5 b Prior years' undistributed income Subtract line 4b from line 2b  C Enter the amount of prior years' undistributed momen for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b Taxable amount - see instructions e Undistributed income for 2008 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 O.  Amounts treated as distributions out of corpus to safisty requirements imposed by section 170(b)(1)(F) or 4942(0)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 O. 9 Excess fish routions carryover to 2010. Subtract lines 2 Excess distributions carryover to 2010. Subtract lines 6 and 5 from line 6a O. Analyss of line 9 a Excess from 2005 Excess from 2006  | a Applied to 2008, but not more than line 2a         |   |                            | 0.                                    |   |
| c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2009 distributable amount e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2009 (if an amount appears in column (ii)) 5 Excess distributions carryover applied to 2009 (if an amount appears in column (iii)) 6 Enter the net total of each column as indicated below: a Corpus Add lines 31, 4c, and 4e Subtract line 5 b Priori years' undistributed income Subtract line 4b from line 2b c Enter the amount of priori years' undistributed income for which a notice of deficiency has been issued, or on which the section 494(2i) taxhs abe empreviously assessed  Subtract line 6c from line 6b Taxable amount - see instructions e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instructions e Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount - see instructions e Undistributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(f) or 4942(b)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 4 and 5 from line 6a 0 Analysis of line 9 a Excess from 2005 b Excess from 2006   | b Applied to undistributed income of prior           |   | -                          |                                       |   |
| (Election required - see instructions) d Applied to 2009 distributable amount e Remaining amount distributed out of corpus 5 Excess distributable coloring (i), the same amount must be shown in column (ii), the same amount must be shown in column (ii), the same amount must be shown in column (ii), the same amount must be shown in column (ii), the same amount must be shown in column (ii), the same amount must be shown in column (ii), the same amount must be shown in column (ii), the same amount must be shown in column (ii), the same amount must be shown in column (ii), the same amount must be shown in column (ii), the same amount must be shown in column (ii), the same amount must be shown in column (ii), the same amount  677,417.  677,417.  7 O .  8 Enter the aft total of each column as indicated the shown in column (ii), the same amount must be distributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed  9 O .  9 Column (ii) and in the same amount  10 O .  11 Undistributed income for 2008 Subtract line 4 af rom line 2a Taxable amount - see instructions 12 Undistributed income for 2008 Subtract line 4 af rom line 2a Taxable amount - see instructions 13,700 .  12 O .  13 O .  14 O .  15 O .  16 O .  16 O .  17 O .  18 Excess distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(p)(3)  18 Excess distributions carryover from 2004 not applied on line 5 or line 7  10 O .  21 O .  21 O .  22 O .  22 O .  23 O .  24 O .  25 O .  26 O .  27 O .  28 Excess distributions carryover from 2004 not applied on line 5 or line 7  20 O .  21 O .  22 O .  23 O .  24 O .  25 O .  26 O .  27 O .  28 O .  29 O .  20 O .  21 O .  21 O .  22 O .  23 O .  24 O .  25 O .  26 O .  27 O .  27 O .  28 O .  29 O .  20 O .  21 O .  21 O .  22 O .  23 O .  24 O .  25 O .  26 O .  27 O .  27 O .  27 O .  28 O .  29 O .  20 O .  20 O  | years (Election required - see instructions)         |   | 0.                         |                                       |   |
| d Applied to 2009 distributable amount e Remanning amount distributed out of corpus Excess distributions carryover from 2004 (fina mount appears in column (a)).  Excess distributions carryover and spirit or 2009 (fina mount appears in column (a)).  Excess distributions carryover from 2004 not applied to 2009  Excess distributions carryover from 2004 not applied on line 5 or line 7  Excess from 2005  Excess from 2005  Excess from 2005  Excess from 2006  Excess from 2006  Excess distributions carryover to 2010. Subtract line 4 from line 2b  Carryon on the carryon of the carryover to 2010. Subtract line 6 from line 6 from line 6 a  Analysis of line 9  Excess from 2006  Excess from 2006  Excess from 2006  Carryon on the carryover from 2004 not applied on line 5 or line 7  Excess from 2006  Excess from 2006  Carryon on the carryover from 2004 not applied on line 5 or line 7  Excess from 2006  Carryon on the carryover from 2004 not applied on line 6 or line 7  Excess from 2006  Carryon on the carryover from 2004 not applied on line 5 or line 7  Excess from 2006  Carryon on the carryover from 2004 not applied on line 6 or line 7  Excess from 2006  Carryon on the carryover from 2004 not applied on line 5 or line 7  Excess from 2006  Carryon on the carryover from 2004 not applied on line 5 or line 7  Excess from 2006  Carryon on the same amount of 2, 2, 770 or 2 | c Treated as distributions out of corpus             |   |                            | - 11 1-1-1                            |   |
| e Remaining amount distributed out of corpus  5 Excess distributions carryover applied to 2009 (if an amount appears incolumn (b), the same amount must be shown in column (a)  6 Enter the net total of each column as indicated below:  a Corpus Add lines 31, 4c, and 4e Subtract line 5  b 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 6 from line 6 b Taxable amount - see instructions  e Undistributed income for 2008 Subtract line 4 from line 2a Taxable amount - see instructions  e Undistributed income for 2009 Subtract line 4 from line 2a Taxable amount rese instructions  e Undistributed income for 2009 Subtract line 4 from line 2a Taxable amount must be distributed in 2010  7 Amounts treated as distributions out of corpus to satisty requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2004 not applied on line 5 or line 7  9 Excess distributions carryover to 2010.  Subtract lines 7 and 8 from line 6a  0 Analysis of line 9  a Excess from 2005  Excess from 2006   | (Election required - see instructions)               | 0.                                      |                            |                                       |   |
| e Remaining amount distributed out of corpus  5 Excess distributions carryover applied to 2009 (if an amount appears incolumn (b), the same amount must be shown in column (a)  6 Enter the net total of each column as indicated below:  a Corpus Add lines 31, 4c, and 4e Subtract line 5  b 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 6 from line 6 b Taxable amount - see instructions  e Undistributed income for 2008 Subtract line 4 from line 2a Taxable amount - see instructions  e Undistributed income for 2009 Subtract line 4 from line 2a Taxable amount rese instructions  e Undistributed income for 2009 Subtract line 4 from line 2a Taxable amount must be distributed in 2010  7 Amounts treated as distributions out of corpus to satisty requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2004 not applied on line 5 or line 7  9 Excess distributions carryover to 2010.  Subtract lines 7 and 8 from line 6a  0 Analysis of line 9  a Excess from 2005  Excess from 2006   | d Applied to 2009 distributable amount               |   |                            | · · · · · · · · · · · · · · · · · · · | 3,700.                                  |
| (if an amount appears in column (a), the same amount must be elsown in column (a).  6 Enter the net lotal of each column as indicated below:  a Corpus Add lines 3f, 4c, and 4e Subtract line 5 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 instructions e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instructions e Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2004 not applied on line 5 or line 7  9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a  0 Analysis of line 9 a Excess from 2005 b Excess from 2006   | e Remaining amount distributed out of corpus         | 0.                                      |                            |                                       | ·····                                   |
| 6 Enter the net total of each column as indicated below:  a Corpus Add innes 3f, 4c, and 4e. Subtract line 5 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 6b Traxable amount - see instructions e Undistributed income for 2008 Subtract line 4a from line 2 Taxable amount - see instructions  Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010  Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  Excess distributions carryover from 2004 not applied on line 5 or line 7  Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a  Analysis of line 9 a Excess from 2005 b Excess from 2005   | (If an amount appears in column (d), the same amount | 2,770.                                  |                            |                                       | 2,770.                                  |
| a Corpus Add lines 31, 4c, and 4e Subtract line 5 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 instructions e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instructions e Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover from 2001. Subtract lines 7 and 8 from line 6a 0 Analysis of line 9 a Excess from 2005 b Excess from 2006  6 1, 4 8 6. b Excess from 2006  | 6 Enter the net total of each column as              |   |                            |                                       |   |
| 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 instructions  e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instructions  f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010  Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  Excess distributions carryover from 2004 not applied on line 5 or line 7  Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a  Analysis of line 9  a Excess from 2005  b Excess from 2006  b Excess from 2006  | 8 Corpus Add lines 3f, 4c, and 4e, Subtract line 5   | 67.417.                                 |                            |                                       |   |
| 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 instructions e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr 1 Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 0 Analysis of line 9 a Excess from 2005 b Excess from 2006 b Excess from 2006   |  | , , , , ,                               |                            |                                       | ······································  |
| 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 instructions e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 0 Analysis of line 9 a Excess from 2005 b Excess from 2006  | i i  |   | 0.                         |                                       |   |
| 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 instructions  e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instructions  e Undistributed income for 2009 Subtract line 4d from line 1 This amount must be distributed in 2010  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2004 not applied on line 5 or line 7  9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a  Analysis of line 9  a Excess from 2005  b Excess from 2005  b Excess from 2006   |  |   |                            |                                       | ·····                                   |
| the section 4942(a) tax has been previously assessed  d Subtract line 6c from line 6b Taxable amount - see instructions e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 0 Analysis of line 9 a Excess from 2005 b Excess from 2006  | undistributed income for which a notice of           |   |                            |                                       |   |
| assessed  d Subtract line 6c from line 6b Taxable amount - see instructions e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 0 Analysis of line 9 a Excess from 2005 b Excess from 2005 b Excess from 2006   |  |   |                            |                                       |   |
| amount - see instructions e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 67,417. 0 Analysis of line 9 a Excess from 2005 b Excess from 2006  |  |   | 0.                         |                                       |   |
| e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr  f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2004 not applied on line 5 or line 7  9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a  0 Analysis of line 9 a Excess from 2005 b Excess from 2006   | d Subtract line 6c from line 6b Taxable              |   |                            |                                       | <del></del>                             |
| 4a from line 2a Taxable amount - see instr  f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2004 not applied on line 5 or line 7  9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a  0 Analysis of line 9 a Excess from 2005 b Excess from 2006   | amount - see instructions                            |   | 0.                         |                                       |   |
| f Undistributed income for 2009 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010.  7. Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3).  8. Excess distributions carryover from 2004 not applied on line 5 or line 7.  9. Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a.  0. Analysis of line 9. a Excess from 2005. b Excess from 2006.   | e Undistributed income for 2008. Subtract line       |   |                            |                                       | *************************************** |
| lines 4d and 5 from line 1 This amount must be distributed in 2010  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2004 not applied on line 5 or line 7  9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a  0 Analysis of line 9 a Excess from 2005 b Excess from 2006  | 4a from line 2a Taxable amount - see instr           |   |                            | 0.                                    |   |
| be distributed in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 0 Analysis of line 9 a Excess from 2005 61,486. b Excess from 2006  | f Undistributed income for 2009 Subtract             |   |                            |                                       |   |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2004 not applied on line 5 or line 7  9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a  0 Analysis of line 9  a Excess from 2005 61,486. b Excess from 2006   | lines 4d and 5 from line 1. This amount must         |   |                            |                                       |   |
| corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)  8 Excess distributions carryover from 2004 not applied on line 5 or line 7  9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a  0 Analysis of line 9  a Excess from 2005 61,486. b Excess from 2006   | be distributed in 2010                               |   |                            |                                       | 0.                                      |
| section 170(b)(1)(f) or 4942(g)(3)  8 Excess distributions carryover from 2004 not applied on line 5 or line 7  9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a  0 Analysis of line 9 a Excess from 2005 b Excess from 2006  | 7 Amounts treated as distributions out of            |   |                            |                                       |   |
| 8 Excess distributions carryover from 2004 not applied on line 5 or line 7  9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a  0 Analysis of line 9 a Excess from 2005 b Excess from 2006  | corpus to satisfy requirements imposed by            |   |                            |                                       |   |
| not applied on line 5 or line 7  9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a  0 Analysis of line 9  a Excess from 2005 b Excess from 2006  | section 170(b)(1)(F) or 4942(g)(3)                   | 0.                                      |                            |                                       |   |
| 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 67,417.  0 Analysis of line 9 a Excess from 2005 61,486. b Excess from 2006  | 8 Excess distributions carryover from 2004           |   |                            |                                       |   |
| Subtract lines 7 and 8 from line 6a 67,417.  O Analysis of line 9 a Excess from 2005 61,486. b Excess from 2006  | not applied on line 5 or line 7                      | 0.                                      |                            |                                       |   |
| 0 Analysis of line 9 a Excess from 2005 61,486. b Excess from 2006   | 9 Excess distributions carryover to 2010.            |   |                            |                                       |   |
| a Excess from 2005 61,486. b Excess from 2006  | Subtract lines 7 and 8 from line 6a                  | 67,417.                                 |                            |                                       | ·····                                   |
| b Excess from 2006   | O Analysis of line 9                                 |   |                            |                                       |   |
|  |  |   |                            |                                       |   |
| c Excess from 2007   5,931.  |  | •                                       | 1                          |                                       |   |
|  |  |   |                            |                                       |   |
| d Excess from 2008   |  |   |                            |                                       |   |
| e Excess from 2009   Form 990-PF (2009)  | e Excess from 2009                                   |   |                            |                                       | - 000 55                                |

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| Part XV Supplementary Information (continued)                                  |  |                         |                                  |                          |  |  |  |
|--|--|-------------------------|----------------------------------|--------------------------|--|--|--|
| 3 Grants and Contributions Paid During the Year or Approved for Future Payment |  |                         |                                  |                          |  |  |  |
| Recipient  | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of | Purpose of grant or contribution | Amount                   |  |  |  |
| Name and address (home or business)  | or substantial contributor   | recipient               |                                  |                          |  |  |  |
| SEE STATEMENT 7  | or substantial contributor   | recipient               |                                  |                          |  |  |  |
| Total  |  |                         | <b>▶</b> 3a                      | 3,700.                   |  |  |  |
| b Approved for future payment  NONE  |  |                         |                                  |                          |  |  |  |
| Total  |  |                         | <b>▶</b> 3b                      | 0.                       |  |  |  |
| 923611 02-02-10  |  |                         | F                                | orm <b>990-PF</b> (2009) |  |  |  |

| Part XVI-A | Analysis of | Income-Producing | Activities |
|------------|-------------|------------------|------------|
|------------|-------------|------------------|------------|

| Enter gross amounts unless otherwise indicated               | Unrelated            | business income        | Excluded t                    | y section 512, 513, or 514 | (e)                                   |  |
|--|----------------------|------------------------|-------------------------------|----------------------------|---------------------------------------|--|
| 1 Program service revenue                                    | (a)<br>Business      | (b)<br>Amount          | (C)<br>Exclu-<br>sion<br>code | (d)<br>Amount              | Related or exempt function income     |  |
| •  | code                 |                        | code                          |                            |                                       |  |
| a<br>b   | _                    |                        |                               |                            |                                       |  |
|  | _                    |                        |                               |                            |                                       |  |
| d  |                      |                        | <del>-  </del>                |                            |                                       |  |
| 0  |                      |                        |                               |                            |                                       |  |
| f  |                      |                        |                               |                            |                                       |  |
| g Fees and contracts from government agencies                |                      |                        | + +                           |                            |                                       |  |
| 2 Membership dues and assessments                            |                      |                        |                               |                            |                                       |  |
| 3 Interest on savings and temporary cash                     |                      |                        |                               |                            |                                       |  |
| investments  |                      |                        | 14                            | 251.                       |                                       |  |
| 4 Dividends and interest from securities                     |                      | <del></del>            | 14                            | 251.<br>2,138.             |                                       |  |
| 5 Net rental income or (loss) from real estate               |                      | 77                     |                               |                            | · · · · · · · · · · · · · · · · · · · |  |
| a Debt-financed property                                     |                      |                        |                               |                            |                                       |  |
| b Not debt-financed property                                 |                      |                        | **-                           |                            | <del></del>                           |  |
| 6 Net rental income or (loss) from personal                  |                      |                        |                               |                            |                                       |  |
| property   |                      |                        |                               |                            |                                       |  |
| 7 Other investment income                                    |                      |                        |                               |                            |                                       |  |
| 8 Gain or (loss) from sales of assets other                  |                      |                        |                               |                            | ·                                     |  |
| than inventory   |                      |                        |                               |                            |                                       |  |
| 9 Net income or (loss) from special events                   |                      |                        |                               |                            |                                       |  |
| O Gross profit or (loss) from sales of inventory             |                      |                        |                               |                            | · · · · · · · · · · · · · · · · · · · |  |
| 11 Other revenue   |                      |                        |                               |                            |                                       |  |
| a  |                      |                        |                               |                            |                                       |  |
| b  |                      |                        |                               |                            |                                       |  |
| C  | 1                    |                        |                               |                            |                                       |  |
| d  | 1                    |                        |                               |                            |                                       |  |
| e  |                      |                        |                               |                            |                                       |  |
| 2 Subtotal Add columns (b), (d), and (e)                     |                      | 0                      |                               | 2,389.                     | 0.                                    |  |
| 3 Total Add line 12, columns (b), (d), and (e)               |                      |                        |                               | 13                         | 2,389.                                |  |
| See worksheet in line 13 instructions to verify calculations | )                    |                        |                               |                            |                                       |  |
| Part XVI-B Relationship of Activities                        | s to the Accor       | nplishment of I        | Exempt P                      | urposes                    |                                       |  |
|  |                      |                        | <del>-</del>                  |                            |                                       |  |
| Line No. Explain below how each activity for which in        | ncome is reported in | column (e) of Part XVI | I-A contributed               | importantly to the accompl | ishment of                            |  |

| Line No. | Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) |  |  |  |  |  |
|----------|--|--|--|--|--|--|
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923621 02-02-10

| Part XVII   Information Regarding Transfers To and Transactions and Relationships With Noncharitable   Exempt Organizations   |        | ON VI      | <del></del>                            |                                  | FAMILI FOUNDATIO                       |   | 00/020           |                | ige <b>13</b> |
|---|--------|------------|--|----------------------------------|--|---|------------------|----------------|---------------|
| 1 Dot the organization directly or indirectly engages in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)) organizations) or insection 527, relating to political organizations?  1 Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash (2) Other assets  2 Dotter transactions  1 (1) Cash (2) Other assets  3 Dotter transactions  1 (1) Sales of seasets to a noncharitable exempt organization  1 (2) Purchases of assets from a noncharitable exempt organization  1 (3) Rental of facilities, equipment, or other assets  4 (4) Reminuscement arrangements  5 Loans or loan greateries  5 Performance of services or immebieship or fundrasing solicitations  5 Sharing of facilities, equipment, mailing lists, other assets, or paid employees  4 If the answer of any of the above is "75; complete the collowing schedule Column (b) should always show the fair market value of the goods, ther asset or services given by the reporting foundation if the foundation received less than fair market value on the goods, other assets or services given by the reporting foundation if the foundation distribution of the properties foundation or sharing arrangement, show in column (f) this value of the goods, other assets, or services greated (a) Line so (b) Amount involved (c) Name of noncharitable exempt organization (d) Decorption of treatment transactions, and sharing arrangement in section 501(c) of the Code (other than sections 501(c)(3)) or in section 50272  1 If yes, complete the following schedule  (a) Name of organization (b) Type of organization (c) Description of relationship  1 If yes, complete the following schedule or the section 501(c)(3) or in section 501(c)(3) or in section 501(c) or in color or section 501(c) or including the section 501(c) or i  |        | art Av     |  |                                  | s To and Transactions ar               | nd Relationships With Nonc                      | haritable        | е              |               |
| the Code (other than section 501(c)(3) organizations) or in section S27, relating to political organizations?  3 Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash (2) Other sassits  b Other transactions (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reminuscent arrangement or services or membership or fundraising solicitations (5) Loans or loan guarantees (5) Loans or loan guarantees (6) Parformance of services or membership or fundraising solicitations (8) Parformance of services or membership or fundraising solicitations (9) Parformance of services or membership or fundraising solicitations (9) Parformance of services or membership or fundraising solicitations (9) Parformance of services or membership or fundraising solicitations (9) Parformance of services or membership or fundraising solicitations (9) Parformance of services or membership or fundraising solicitations (9) Parformance of services or membership or fundraising solicitations (9) Parformance of services or membership or fundraising solicitations (9) Parformance of services or membership or fundraising solicitations (9) Parformance of services or membership or fundraising solicitations (9) Parformance of services or membership or fundraising solicitations (9) Parformance of services or membership or individual services or   | _<br>1 | Dud th     |  |                                  | following with any other organization  | a described in section 501/c) of                |                  | Vac            | No            |
| a Transfers from the exporting foundation to a noncharitable exempt organization of (1) Cash (2) Other assets  Differ transactions (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rehal of facilities, equipment, including sales, depending on the assets (4) Reimbursement arrangements (5) Loans or found pursaments (5) Loans or foundations equipment, minimaling lists, other assets, or paid employees (6) Performance of services or membership or fundrasing solicitations (6) Performance of services or membership or fundrasing solicitations (6) Performance of services or membership or fundrasing solicitations (6) Performance of services or membership or fundrasing solicitations (7) A stress or services or only of the above is "visi," complete the following schedule Column (b) should always show the fair market value of the goods, other assets, or services speen by the reprofund 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 speen by the reprofund 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 speen by the reprofundation directly or indirectly affiliated with, or related to, one or more tax-exempt organization (d) Description of transfers, transactions, and sharing arrangements, show in the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organization (e) Description of relationship  1) If "Yes," complete the following schedule  1) If yes, complete the following schedule  1) If yes, complete the following schedule  2) No If yes a schedule of the goods, other assets, or part and the value in any stransaction or sharing arrangement, as a schedule of the goods, other assets, or part assets or the present of the goods, other assets, or part assets o  | •      |            |  |                                  |  |   |                  | 163            | 140           |
| (2) Other sacets  1 2 Other sacets  1 2 Other sacets  1 3 Alse of assets to a noncharitable exempt organization  (1) Sales of assets from a noncharitable exempt organization  (2) Purchase of assets from a noncharitable exempt organization  (3) Rental of facilities, outprined, or other assets  (4) Remthousinement arrangements  (5) Loans or loan quarantees  (6) Performance of severes or membership or fundrasing solicitations  2 Shaning of facilities, equipment, making lists, other assets, or paid employees  3 If the answer to any of the above is "vis." complete the following schedule Column (b) should always show the fair market value of the goods, other assets, or services received  3 If the answer to any of the above is "vis." complete the following schedule Column (b) should always show the fair market value of the goods, other assets, or services received  3 If the answer to any of the goods, other assets, or services received  4 If the walke of the goods, other assets, or services received  4 If the value of the goods, other assets, or services received  4 If the value of the goods, other assets, or services received  4 If the value of the goods, other assets, or services received  4 If the value of the goods, other assets, or services received  4 If the value of the goods of the goods, other assets, or services received  4 If the value of the goods of the goods, other assets, or services received  4 If the value of the goods of the goods of the services received  4 If the value of the goods of the goods of the services received  4 If the value of the goods of the goods, other assets, or services received  4 If the value of the goods, other assets, or services received  4 If the value of the goods of t  | ,      |            |  |                                  |  | 2410113   |                  |                |               |
| (2) Other assets (3) Askes of assets from a nonchardable exempt organization (4) Purchases of assets from a nonchardable exempt organization (5) Purchases of assets from a nonchardable exempt organization (6) Renatural of facilities, equipment, or other assets (7) Lons or folian puranties (8) Lons or folian puranties (9) Lons or folian puranties (9) Lons or folian puranties (10) Long or folian puranties (11) Long or folian puranties (12) Long or folian puranties (13) Long or folian puranties (14) Long or folian puranties (15) Long or folian puranties (16) Long or folian puranties (17) Long or folian puranties (18) Long or folian puranties (18) Long or folian puranties (19) Long or folian puranties (19) Long or folian puranties (19) Long or folian puranties (10) Long or folian puranties (10) Long or folian puranties (10) Long or folian  |        |            |  |                                  | impt organization of                   |   | 19(1)            |                | x             |
| b) Other transactions  (1) Sales of assets to an anocharitable exempt organization  (2) Puchases of assets from a noncharitable exempt organization  (3) Rental of facilities, equipment, or other assets  (4) Reinthursement arrangements  (5) Loans or loan guarantees  (6) Parformance of services or membership or fundraising solicitations  (7) 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 sectioned  (9) Loans or loan guarantees  (9) 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 sectioned  (1) Unite into (1) Rental into the goods, other assets, or services sectioned  (1) June into (1) Rental into the goods, other assets, or services sectioned  (2) June into (1) Rental into the goods, other assets, or services sectioned  (3) Marine of regular and into the goods of the good  |        |            |  |                                  |  |   |                  | <del>  -</del> |               |
| (1) Alse of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Related in Catellies, equipment, or other assets (4) Reminusement arrangements (5) Lones or long nigrantees (6) Performance of services or membership or fundraising subcitations (7) Experiment of services express or membership or fundraising subcitations (8) Performance of services or membership or fundraising subcitations (9) In the asset to any of the above is "Ves," complete the following schedule (column (b) should always show the fair market value of the goods, other assets, or services given by the experiment fundraising services 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 (b) the value of the goods, other assets, or services givened (3) Line in (b) Amount involved (1) Amount involved (2) Amount involved (3) Line in (b) Amount involved (4) Name of noncharitable exempt organization (4) Description of transfers, transactions, and sharing arrangements N/A  10 In Yes, Complete the following schedule (4) Name of organization (5) Type of organization (6) Type of organization (6) Description of relationship  11 Yes, Complete the following schedule (6) Name of organization (9) Type of organization (9) Type of organization (10) Type of organization (10) Type of organization of the best of my stronledge and best if it is two, correct, and complete Declaration of proper to their than between the result, including in based on all information deviations of the best of my stronledge and best if it is two, correct, and complete Declaration of proper to their than between the result, including in based on all information of windows any knowcess  10 Date  11 Date  11 Date  12 Date  13 Date  14 Date  15 Date  16 Date  17 Date  17 Date  18 Date  19 Date  19 Date  19 Date  10 Date  10 Date  10 Date  11 Date   | 1      |            |  |                                  |  |   | 18(2)            |                |               |
| (2) Purchases of assets from a nonchartable exempt organization  (3) Rental of facilities, equipment, or other assets  (4) Reimbursement arrangements  (5) Loans or loan quarantees  (5) Loans or loan quarantees  (6) Performance of services or membership or fundraising solicitations  (7) It is an 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 exceed less than fair market value in any transaction or sharing arrangement, show in column (d) the value of this goods, other assets, or services received  (a) Line no (b) Amount involved (c) Name of nonchartable exempt organization (d) Description of viewsless, transactions, and sharing arrangements.  N/A  (a) Secondation directly or indirectly affiniated 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?  (a) If "Yes," complete the following schedule  (b) Type of organization (c) Description of relationship  N/A  (b) Type of organization (c) Description of relationship  N/A  (c) Description of relationship  N/A  (d) Description of relationship  N/A  (e) Description of relationship  N/A  (f) Description of relationship  N/A  (g) Name of organization (b) Type of organization (c) Description of relationship  N/A  (a) Name of organization (b) Type of organization (c) Description of relationship  N/A  (a) Name of organization (b) Type of organization (c) Description of relationship  N/A  (b) Type of organization (c) Description of relationship  N/A  (c) Description of relationship  N/A  (d) Description of relationship  N/A  (e) Description of relationship  N/A  (e) Description of relationship  N/A  (f) Remarked or description of relationship  N/A  (g) Type of organization (c) Description of relationship  N/A  (e) Description of relationship  N/A  (f) Type of organization (c) Description of relationship  N/A  (e) Descr  |        |            |  | ble exempt organization          |  |   | 16(1)            |                | х             |
| (4) Rembusement arrangements (5) Loans or loan guarantees (5) Loans or loan guarantees (6) Parformance of services or membership or fundraising solicitations (7) Loans or loan guarantees (8) Loans or loan guarantees (9) Loans or loan guarantees (10) Parformance of services or membership or fundraising solicitations (10) In 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 received (1) Interior (1)  |        |            |  | <del>-</del>                     | ation                                  |   |                  |                |               |
| (4) Rembursement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations (7) Performance of services or membership or fundraising solicitations (8) Performance of services or membership or fundraising solicitations (9) Performance of services or membership or fundraising solicitations (1) Performance of services or services accumulation (1) Performance of services or services accumulation (1) Performance or large transactions or saming arrangement, show in column (1) the value of the goods, other assets, or services received (10) Amount involved (10) Name of nonchariation exempt organization (10) Performance of transactions, and sharing arrangements (10) Amount involved (10) Name of nonchariation exempt organization (10) Description of transactions, and sharing arrangements (10) Description of relationship (10) Description of relationship (11) Performance of pergury, I declare that have examined the return, including accompanying schedules and participation. And to the best of my knowledge and belief, it is true, correct, and complete Declaration of Impairs (preparate schedulary) is based on all information of which propagations are knowledge.  20) Pergurant's CAROLYN J. JULIAN, CPA  21 CK BUSINESS ADVISORS, INC., CPAS  EIN Pergurant's Septiment yours. ZICK BUSINESS ADVISORS, INC., CPAS  EIN Pergurant's Septiment yours. ZICK BUSINESS PLACE E, BLDG C  |        |            |  | , ,                              |  |   |                  |                |               |
| (5) Loans or loan guarantees  (5) Performance of services or membership or fundratising solicitations  (5) Performance of services or membership or fundratising solicitations  (6) Performance of services or membership or fundratising solicitations  (7) In 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  (8) Line in (0) Amount involved (c) Name of noncharitable exempt organization (d) Desemption of trientees, transactions, and sharing arrangements  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 52??  (a) Name of organization (b) Type of organization (c) Description of relationship  N/A  (b) Type of organization (c) Description of relationship  Under penalties of perpury, I decline that have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct.  25   Proparer's   CAROLYN J. JULIAN, CPA   Date   Date   Propaser's identifying number   Pro  |        | . ,        |  |                                  |  |   | <del></del>      |                |               |
| (6) Performance of services or membership or fundrasing solicitations  5 Sharing of facilities, equipment, mailing lists, other assets, or paid employees  8 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 review of the value of the goods, other assets, or services review of the value of the goods, other assets, or services review of the value of the goods, other assets, or services received  (a) Line no (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements  N/A  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?  b If Yes, complete the following schedule:  (a) Name of noncharitable exempt organization (c) Description of relationship  N/A  (b) Type of organization (c) Description of relationship  N/A  Under penalties of perjury, I decises that I have examined this return, including a companying schedules and statistics, and to the best of my knowledge and belief, it is fusion, correct, and complete Decisionship of organization of organization of organization of organization of organization or following accompanying schedules and statistics, and to the best of my knowledge and belief, it is fusion, correct, and complete Decisionship or following accompanying schedules and statistics, and to the best of my knowledge and belief, it is fusion, correct, and complete Decisionship of organization of organization or following accompanying schedules and statistics, and to the best of my knowledge and belief, it is fusion, correct, and complete Decisionship of organization organization organization organization organiz  |        |            |  |                                  |  |   |                  | ļ              |               |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees  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 greened  (a) Line no  (b) Amount involved  (c) Name of noncharitable exempt organization  (d) Description of transfers, transactions, and sharing arrangement, show in N/A  (a) Line no  (b) Amount involved  (c) Name of noncharitable exempt organization  (d) Description of transfers, transactions, and sharing arrangements  N/A  2a Is the foundation directly or indirectly affiniated 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 52??  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under permittee of perpury 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 Declarion of prepare (other than up oflyer or foliciosity) in based on all information of which prepared has any knowledge  Object of trustee  Date  Preparer's  Signature of officer or trustee  CAROLYN J. JULIAN, CPA  Date  Preparer's signature of officer or trustee  Object of the code (other than up of type or foliciosity) in based on all information of which prepared has any knowledge and belief, it is true, correct, and complete Declarion of preparer's identifying number  |        |            | <u> </u>                               | mbership or fundraising so       | olicitations                           |   |                  | ļ              |               |
| d If the answer to any of the above is "es", 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  (a) Line no (b) Amount involved (c) Name of noncharidable exempt organization (d) Description of transfers, transactions, and sharing arrangements in N/A  22. 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?  33. No  34. If "Yes," complete the following schedule  (a) Name of organization (b) Type of organization (c) Description of relationship  35. No  36. If "Yes," complete the following schedule  (a) Name of organization (b) Type of organization (c) Description of relationship  36. If yes, complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship  36. If yes, complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship  37. A positive of officer or trustee Date  38. Signature of officer or trustee  39. Peparer's Signature of Officer or trustee  39. Signature of Officer or trustee  3  | (      |            |  |                                  |  |   |                  |                |               |
| 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  (a) Line no (b) Amount involved (c) Name of noncharitable exempt organization (d) Disconption of transfers, transactions, and sharing arrangements  N/A  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?  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of porpuy, I declare that I have examined this nature, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Occlaration of preparer (when their purpose of flucions) is based on all information of which propagate has any knowledge and belief, it is true, correct, and complete Occlaration of preparer (other than purpose of flucions) is based on all information of which propagate has any knowledge and belief, it is true, correct, and complete Occlaration of preparer (other than purpose of flucions) is based on all information of which propagate has any knowledge of the Check if the preparer's identifying number of propagate (other than purpose). If INVERNESS ADVISORS, INC., CPAS  EIN Preparer's identifying number of SV11/10 interections of the Check if the propagate (other than purpose). If INVERNESS PLACE E, BLDG C  |        |            |  |                                  |  | avs show the fair market value of the good      |                  | sets.          |               |
| (a) Line no (b) Amount involved (c) Name of nonchartable exempt organization (d) Description of transfers, transactions, and sharing arrangements  N/A  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?  b if "Yes," complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penjury, Ideative that These 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 propagar (pither than tax-sayer or feduciary) is based on all information of which propagals has any knowledge    Preparer's   CAROLYN J. JULIAN, CPA   Date   Check if   Signature   CAROLYN J. JULIAN, CPA   Date   Check if   Check i  |        | or ser     | vices given by the reporting f         | oundation. If the foundation     | received less than fair market value   | in any transaction or sharing arrangemen        | nt, show in      |                |               |
| N/A  2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section \$01(c) of the Code (other than section \$01(c)(3)) or in section \$2??  In Yes, complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  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 the following of 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 supplyer or followard) is based on all information of wind proposed has any knowledge  Signature of officer or trustee  Date  Title  Preparer's CAROLYN J. JULIAN, CPA  Date  O5/11/10 employed  In Preparer's identifying number of the self-open of the control of the penalties of perjury in the penalties of penilty in the penilty |        |            |  |                                  |  |   |                  |                |               |
| 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 52?2  | (a)    | Line no    | (b) Amount involved                    | (c) Name of nonch                | naritable exempt organization          | (d) Description of transfers, transactions,     | and sharing ar   | rangeme        | nts           |
| in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  □ If "Yes," complete the following schedule  (a) Name of organization  N/A  □ N/A   |        |            |  | N                                | I/A                                    |   |                  |                |               |
| in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  □ If "Yes," complete the following schedule  (a) Name of organization  N/A  □ N/A   |        |            |  |                                  |  |   |                  |                |               |
| in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  □ If "Yes," complete the following schedule  (a) Name of organization  N/A  □ N/A   |        |            |  |                                  |  |   |                  |                |               |
| In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  If "Yes," complete the following schedule  (a) Name of organization  (b) Type of organization  (c) Description of relationship  N/A  Under penalties of penury, 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 tay bayer or fiduciary) is based on all information of which preparer has any knowledge  Signature of officer or trustee  Date  Preparer's identifying number self-remployed.  Title  Preparer's identifying number self-remployed.  If all INVERNESS PLACE E, BLDG C   |        |            |  |                                  |  |   |                  |                |               |
| in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  □ If "Yes," complete the following schedule  (a) Name of organization  N/A  □ N/A   |        |            |  |                                  |  |   |                  |                |               |
| in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  □ If "Yes," complete the following schedule  (a) Name of organization  N/A  □ N/A   |        |            |  |                                  |  |   |                  |                |               |
| in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  □ If "Yes," complete the following schedule  (a) Name of organization  N/A  □ N/A   |        |            |  |                                  |  |   |                  |                |               |
| in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  □ If "Yes," complete the following schedule  (a) Name of organization  N/A  □ N/A   |        |            |  |                                  |  |   |                  |                |               |
| in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  □ If "Yes," complete the following schedule  (a) Name of organization  N/A  □ N/A   |        |            |  |                                  |  |   |                  |                |               |
| in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  □ If "Yes," complete the following schedule  (a) Name of organization  N/A  □ N/A   | _      |            |  |                                  |  |   |                  |                |               |
| in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  □ If "Yes," complete the following schedule  (a) Name of organization  N/A  □ N/A   |        |            |  |                                  |  |   |                  |                | •••           |
| in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  □ If "Yes," complete the following schedule  (a) Name of organization  N/A  □ N/A   |        |            |  |                                  |  |   |                  |                |               |
| in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  □ If "Yes," complete the following schedule  (a) Name of organization  N/A  □ N/A   |        |            | <del> </del>                           |                                  |  |   |                  |                |               |
| in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  □ If "Yes," complete the following schedule  (a) Name of organization  N/A  □ N/A   |        |            |  |                                  |  |   |                  |                |               |
| in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  □ If "Yes," complete the following schedule  (a) Name of organization  N/A  □ N/A   |        |            |  |                                  | <del>-</del>                           |   |                  |                |               |
| in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  □ If "Yes," complete the following schedule  (a) Name of organization  N/A  □ N/A   |        | i          | <del></del>                            |                                  |  | L   |                  |                |               |
| Under penalties of penury, 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 tax bayer or fiduciary) is based on all information of which preparer has any knowledge    Visual Preparer's signature   CAROLYN J. JULIAN, CPA   Date   Check if self-employed   Preparer's identifying number   | 2      |            |  |                                  | · · · · · · · · · · · · · · · · · · ·  | ations described                                |                  |                | _             |
| (a) Name of organization (b) Type of organization (c) Description of relationship  N/A  Under penalties of penury, 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 tax ayer or fiduciary) is based on all information of which preparer has any knowledge    Signature of officer or trustee   Date   Title  |        |            |  |                                  | in section 527?                        |   | Yes              | X              | _ No          |
| Under penalties of penjury, 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 tax player or fiduciary) is based on all information of which preparer has any knowledge    Signature of officer or trustee   Date   Date   Check if self-employed   Preparer's identifying number   |        | ı If Yes   |  |                                  | (1) 7                                  | (-) 5   |                  |                |               |
| 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 tax payer or fiduciary) is based on all information of which preparer has any knowledge    Signature of officer or trustee   Date   Title  |        |            |  | anization                        | (b) Type or organization               | (c) Description of relation                     | onship           |                |               |
| and complete Declaration of preparer (other than tan bayer or fiduciary) is based on all information of which preparer has any knowledge    Signature of officer or trustee   Date   Title  |        |            | N/A                                    |                                  |  |   |                  |                |               |
| and complete Declaration of preparer (other than tan bayer or fiduciary) is based on all information of which preparer has any knowledge    Signature of officer or trustee   Date   Title  | _      |            |  | <u> </u>                         |  |   |                  |                |               |
| and complete Declaration of preparer (other than tan bayer or fiduciary) is based on all information of which preparer has any knowledge    Signature of officer or trustee   Date   Title  |        |            |  | ·                                |  |   |                  |                |               |
| and complete Declaration of preparer (other than tan bayer or fiduciary) is based on all information of which preparer has any knowledge    Signature of officer or trustee   Date   Title  |        |            |  |                                  |  |   | <del></del>      |                |               |
| and complete Declaration of preparer (other than tan bayer or fiduciary) is based on all information of which preparer has any knowledge    Signature of officer or trustee   Date   Title  | _      | Under pr   | enalties of penury. I declare that I h | ave examined this return, includ | ing accompanying schedules and stateme | nts, and to the best of my knowledge and belief | it is this corre | ·ct            |               |
| Signature of officer or trustee  Date  Title  Preparer's signature  CAROLYN J. JULIAN, CPA  Date  O5/11/10  Preparer's identifying number self-self-self-self-self-self-self-semployed  Firm's name (or yours is self-employed).  16 INVERNESS PLACE E, BLDG C  |        |            |  |                                  |  |   | t is tide, cone  |                |               |
| Signature of officer or trustee  Date  Title  Preparer's signature  CAROLYN J. JULIAN, CPA  Date  O5/11/10  Preparer's identifying number self-self-self-self-self-self-self-semployed  Firm's name (or yours is self-employed).  16 INVERNESS PLACE E, BLDG C  |        |            | at                                     | Late .                           | 1 5/11/10                              | Maria   |                  |                |               |
| Preparer's signature CAROLYN J. JULIAN, CPA    Date   O5/11/10   Self-employed   Firm's name (or yours   1self-employed).   16 INVERNESS PLACE E, BLDG C  | ē      | Sin        | inature of officer or trustee          |                                  |  | Title   |                  |                |               |
| Firm's name (or yours ZICK BUSINESS ADVISORS, INC., CPAS 1 self-employed). 16 INVERNESS PLACE E, BLDG C   | Ĕ      | 7 5.9      |  |                                  |  |   | parer's identif  | ying num       | ber           |
| Firm's name (or yours ZICK BUSINESS ADVISORS, INC., CPAS 1 self-employed). 16 INVERNESS PLACE E, BLDG C   | ıgı    | r, ≥       |  | YN J. HIIT. TAN                  |  | self-   |                  | , ,            | -             |
| if self-employed). 16 INVERNESS PLACE E, BLDG C   | S      | 등 응하       | 7104                                   |                                  |  | <del></del>                                     |                  | _              |               |
| address, and ZIP code ENGLEWOOD, CO 80112 Phone no 303-758-9167   |        | rep<br>Jse |  |                                  |  | LIIV  |                  |                |               |
|   |        | 6 7        |  |                                  |  | Phone no 303                                    | -758-            | 916            | 7             |

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| FORM 990-PF INTEREST ON SAV                       | INGS AND TEM                 | IPORARY C                            | ASH IN | NVESTMENTS                   | STATEMENT           | 1                        |
|---|------------------------------|--------------------------------------|--------|------------------------------|---------------------|--------------------------|
| SOURCE  |                              |                                      |        |                              | AMOUNT              |                          |
| CHARLES KURTZ<br>US BANK                          |                              |                                      |        |                              | 2                   | 44.                      |
| TOTAL TO FORM 990-PF, PART I                      | , LINE 3, CO                 | LUMN A                               |        |                              | 2                   | 51.                      |
| FORM 990-PF DIVIDENI                              | DS AND INTER                 | REST FROM                            | SECUI  | RITIES                       | STATEMENT           | 2                        |
| SOURCE  | GROSS                        | S AMOUNT                             |        | ITAL GAINS<br>IVIDENDS       | COLUMN (A<br>AMOUNT | )                        |
| ALTRIA DAIN RAUSCHER KRAFT PHILIP MORRIS WAL MART |                              | 390.<br>398.<br>221.<br>660.<br>469. |        | 0.<br>0.<br>0.<br>0.         | 3<br>2<br>6         | 90.<br>98.<br>21.<br>60. |
| TOTAL TO FM 990-PF, PART I, 1                     | LN 4                         | 2,138.                               |        | 0.                           | 2,1                 | 38.                      |
| FORM 990-PF                                       | ACCOUNTI                     | NG FEES                              | ·      |                              | STATEMENT           | 3                        |
| DESCRIPTION                                       | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVI<br>MENT INC          |        | (C)<br>ADJUSTED<br>NET INCOM |                     |                          |
| ZICK BUSINESS ADVISORS INC                        | 1,335.                       | 1,                                   | ,335.  |                              |                     | 0.                       |
| TO FORM 990-PF, PG 1, LN 16B                      | 1,335.                       | 1,                                   | ,335.  |                              |                     | 0.                       |
| FORM 990-PF                                       | TAX                          | TAXES                                |        |                              | STATEMENT 4         |                          |
| DESCRIPTION                                       | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVE<br>MENT INC          | EST-   |                              |                     |                          |
| EXCISE TAX ON 12-31-08 INVST. INC.                | 32.                          |                                      | 0.     |                              |                     | 0.                       |
| TO FORM 990-PF, PG 1, LN 18                       | 32.                          |                                      | 0.     |                              |                     | 0.                       |
| =   |                              | . ———                                |        |                              |                     | =                        |

| FORM 990-PF                  | OTHER E                      | XPENSES                     |     |                              | STATEMENT  | 5  |
|------------------------------|------------------------------|-----------------------------|-----|------------------------------|------------|----|
| DESCRIPTION                  | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVE<br>MENT INC |     | (C)<br>ADJUSTED<br>NET INCOM |            |    |
| ANNUAL RPT FILING FEES, ETC. | 65.                          |                             | 65. |                              |            | 0. |
| TO FORM 990-PF, PG 1, LN 23  | 65.                          |                             | 65. |                              |            | 0. |
| FORM 990-PF                  | CORPORAT                     | E STOCK                     |     |                              | STATEMENT  | 6  |
| DESCRIPTION                  |                              |                             | ВОО | K VALUE                      | FAIR MARKE | Т  |

|   | AND CONTRIBUTIONS<br>DURING THE YEAR           | STATI               | EMENT 7 |
|---|--|---------------------|---------|
| RECIPIENT NAME AND ADDRESS  | RECIPIENT RELATIONSHIP<br>AND PURPOSE OF GRANT | RECIPIENT<br>STATUS | AMOUNT  |
| BROWN UNIVERSITY SPORTS FOUNDATION 115 WATERMAN PROVIDENCE, RI 02906  | NONE<br>OPERATIONS                             | PRIVATE<br>SCHOOL   | 500.    |
| BROWN UNIVERSITY<br>115 WATERMAN PROVIDENCE, RI<br>02906              | NONE<br>ANNUAL FUND                            | PRIVATE<br>SCHOOL   | 500.    |
| CHILDRENS HOSPITAL<br>13123 E. 16TH AVE AURORA, CO<br>80045           | NONE<br>OPERATIONS                             | EXEMPT ORGANIZ.     | 100.    |
| COLORADO CATTLEMEN LAND TRUST<br>8833 W. 58TH AVE ARVADA, CO<br>80002 | NONE<br>OPERATIONS                             | EXEMPT ORGANIZ.     | 300.    |
| COLORADO HISTORY MUSEUM<br>1300 BROADWAY DENVER, CO 80203             | NONE<br>OPERATIONS                             | PUBLIC<br>MUSEUM    | 100.    |
| COLORADO OPEN LANDS<br>274 UNION BLVD #320 LAKEWOOD,<br>CO 80228      | NONE<br>OPERATIONS                             | EXEMPT<br>ORGANIZ.  | 200.    |
| COLORADO SKI MUSEUM<br>231 S. FRONTAGE RD VAIL, CO<br>80657           | NONE<br>OPERATIONS                             | PUBLIC<br>MUSEUM    | 500.    |
| DENVER ART MUSEUM<br>100 W. 14 AVE PKWY DENVER, CO<br>80204           | NONE<br>OPERATIONS                             | PUBLIC<br>MUSEUM    | 1,000.  |

| CHARLES H. KURTZ FAMILY FOUNDA  | TION               |                    | 84-1067828 |
|---|--------------------|--------------------|------------|
| STEAMBOAT SPRINGS WINTER SPORTS<br>CLUB<br>HOWELSEN HILL LODGE STEAMBOAT<br>SPRINGS, CO 80487 | NONE<br>OPERATIONS | EXEMPT ORGANIZ.    | 100.       |
| URBAN PEAK<br>730 21ST STREET DENVER, CO<br>80205   | NONE<br>PROGRAMS   | AN URBAN<br>LEAGUE | 400.       |
| TOTAL TO FORM 990-PF, PART XV, L  | INE 3A             | <del></del>        | 3,700.     |