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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

OMB No 1545-0052

2009

Note.

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

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

G

Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation UTAH MEDICAL ASSOCIATION FOUNDATION		A Employer identification number 87-6122299	
	Number and street (or P O box number if mail is not delivered to street address) Room/suite 310 East 4500 South		B Telephone number (see page 10 of the instructions) (801) 747-5100	
	City or town, state, and ZIP code Salt Lake City, UT 841074250		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 3,303,128		J Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) (Part I, column (d) must be on cash basis.)		

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))</i>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	1,000			
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	165,603	165,603		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-11,843			
	b Gross sales price for all assets on line 6a <u>437,042</u>				
	7 Capital gain net income (from Part IV, line 2) . . .				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	154,760	165,603		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	3,770		3,770	
	c Other professional fees (attach schedule)	4,100		4,100	
	17 Interest	285	285		
	18 Taxes (attach schedule) (see page 14 of the instructions)	2,904		2,904	
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings	107		107	
	22 Printing and publications				
	23 Other expenses (attach schedule)	16,019	15,927	92	
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	27,185	16,212	10,973	0
	25 Contributions, gifts, grants paid	157,588			157,588
	26 Total expenses and disbursements. Add lines 24 and 25	184,773	16,212	10,973	157,588
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-30,013			
	b Net investment income (if negative, enter -0-)		149,391		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		83,813	83,813
	2	Savings and temporary cash investments	87,379	123,131	123,131
	3	Accounts receivable ▶ <u>6,741</u>			
		Less allowance for doubtful accounts ▶ _____	8,905	6,741	6,741
	4	Pledges receivable ▶ _____			
		Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____			
		Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)	7,834		
	b	Investments—corporate stock (attach schedule)	2,241,090	3,089,442	3,089,442
	c	Investments—corporate bonds (attach schedule).	349,959		
	11	Investments—land, buildings, and equipment basis ▶ _____			
	Less accumulated depreciation (attach schedule) ▶ _____				
12	Investments—mortgage loans				
13	Investments—other (attach schedule)				
14	Land, buildings, and equipment basis ▶ _____				
	Less accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)		1	1	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	2,695,167	3,303,128	3,303,128	
Liabilities	17	Accounts payable and accrued expenses	4,201	88,955	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	4,201	88,955	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted	2,690,966	3,214,173	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	2,690,966	3,214,173	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	2,695,167	3,303,128	

Part III Analysis of Changes in Net Assets or Fund Balances		
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	12,690,966
2	Enter amount from Part I, line 27a	-30,013
3	Other increases not included in line 2 (itemize) ▶ _____	553,220
4	Add lines 1, 2, and 3	3,214,173
5	Decreases not included in line 2 (itemize) ▶ _____	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	3,214,173

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				
(e) Gross sales price		(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table			
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) F M V as of 12/31/69		(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a	See Additional Data Table			
b				
c				
d				
e				
2	Capital gain net income or (net capital loss)		<div><div>If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</div></div>	<div><div>2</div><div>-11,843</div></div>
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) <div>If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8</div>		<div><div>3</div><div>10,694</div></div>	

Part V

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

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

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

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









1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries			
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	147,596	3,397,864	0 043438
2007	142,092	3,783,615	0 037555
2006	119,910	3,596,135	0 033344
2005	105,500	3,106,682	0 033959
2004	93,500	2,670,467	0 035013
2	Total of line 1, column (d).		<div><div>2</div><div>0 183309</div></div>
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years		<div><div>3</div><div>0 036662</div></div>
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.		<div><div>4</div><div>2,663,684</div></div>
5	Multiply line 4 by line 3.		<div><div>5</div><div>97,656</div></div>
6	Enter 1% of net investment income (1% of Part I, line 27b).		<div><div>6</div><div>1,494</div></div>
7	Add lines 5 and 6.		<div><div>7</div><div>99,150</div></div>
8	Enter qualifying distributions from Part XII, line 4.		<div><div>8</div><div>157,588</div></div>
If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18			

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)			
1aExempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
bDomestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	1,494
cAll other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3Add lines 1 and 2.		3	1,494
4Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	1,494
6Credits/Payments			
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	2,904
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7Total credits and payments Add lines 6a through 6d.		7	2,904
8Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached		8	
9Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	1,410
11Enter the amount of line 10 to be Credited to 2010 estimated tax 1,410 Refunded		11	

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




















Part VII-A

Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address  www.utahmed.org/foundationinfo.htm	13	Yes	
14	The books are in care of  UTAH MEDICAL ASSOCIATION Telephone no  (801) 747-3500 Located at  310 E 4500 South Ste 500 Salt Lake City UT ZIP+4  841022707			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here   and enter the amount of tax-exempt interest received or accrued during the year.		15	

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

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

Part VII-B

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions).	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	5b		No
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870.</i>	6b		No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Total number of other employees paid over \$50,000.				

Part VIII

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

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 Provided grants to three organizations for capital projects related to healthcare. One was for website design, one was for clinic expansion, and one was to fund an electronic medical records system.	50,000
2 Provided grants to two organizations to help fund educational programs related to healthcare. One was to a public TV station to produce a program on aging, the other was for parenthood education programs.	15,000
3 Provided grants to twelve organizations to provide direct, ongoing healthcare services to individuals. These include operational grants for low income clinics, support services for assault victims, and immunization services for children, among others.	92,588
4	

Part IX-B

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	2,704,248
b	Average of monthly cash balances.	1b	0
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,704,248
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	2,704,248
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	40,564
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,663,684
6	Minimum investment return. Enter 5% of line 5.	6	133,184

Part XI

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

1	Minimum investment return from Part X, line 6.	1	133,184
2a	Tax on investment income for 2009 from Part VI, line 5.	2a	1,494
b	Income tax for 2009 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,494
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	131,690
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	131,690
6	Deduction from distributable amount (see page 25 of the instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	131,690

Part XII

Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	157,588
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	157,588
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	1,494
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	156,094
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1	Distributable amount for 2009 from Part XI, line 7			
2	Undistributed income, if any, as of the end of 2008			
a	Enter amount for 2008 only. 16,489			
b	Total for prior years 20____, 20____, 20____			
3	Excess distributions carryover, if any, to 2009			
a	From 2004.			
b	From 2005.			
c	From 2006.			
d	From 2007.			
e	From 2008.			
f	Total of lines 3a through e.			
4	Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 157,588			
a	Applied to 2008, but not more than line 2a			
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)			
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions). 9,409			
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 (d), the same amount must be shown in column (a).)			
6	Enter the net total of each column as indicated below:			
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5			
b	Prior years' undistributed income Subtract line 4b from line 2b.			
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.			
d	Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions.			
e	Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions. 16,489			
f	Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010. 131,690			
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions).			
8	Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions).			
9	Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a. 9,409			
10	Analysis of line 9			
a	Excess from 2005.			
b	Excess from 2006.			
c	Excess from 2007.			
d	Excess from 2008.			
e	Excess from 2009.			

Part XIV

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling.

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

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

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

1 Information Regarding Foundation Managers:

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

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

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

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

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

Michelle McOmber
310 E 4500 South Suite 500
Salt Lake City, UT 84107
(801) 747-3500

b The form in which applications should be submitted and information and materials they should include
Application, IRS exemption ltr, tax return, financial stmt & project budget

- c Any submission deadlines
April 15 and October 15

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

Must be for Utah citizens for health related education, facilities, treatment, or projects

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			▶ 3a	157,588
b Approved for future payment				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities.			14	165,603	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	-11,843	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. . .					
11 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e).				153,760	
13 Total. Add line 12, columns (b), (d), and (e).					153,760

[illegible]

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

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

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

Additional Data

Software ID: 09000062

Software Version: 2010-05-13

EIN: 87-6122299

Name: UTAH MEDICAL ASSOCIATION FOUNDATION

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
Colonial Properties Tr 774 sh	P	2005-04-18	2009-03-20
Ameren Corp Com 1200 sh	P	2005-07-01	2009-05-04
Wells Fargo & Co New Com 2000 sh	P	2003-07-01	2009-05-04
Developers Diversified Realty 1554 sh	P	2003-03-01	2009-06-19
Extra Space Storage Inc 500 sh	P	2003-03-01	2009-06-19
Extra Space Storgae Inc 3400 sh	P	2008-12-01	2008-06-19
Developers Diversified Realty	P	2003-03-01	2009-10-30
Kinder Morgan (distr in excess of basis)	P	2000-04-01	1919-11-15
TC Pipelines LP (distr in excess of basis)	P	2000-04-01	2009-11-15
Extra Space Storage Inc Com 500 sh	P	2004-06-01	2009-06-24
Extra Space Storage Inc Com 600 sh	P	2007-06-15	2009-06-24
Dow Chemical 1200 sh	P	2000-04-01	2009-12-09
Xilinx Inc 1500 sh	P	2000-04-01	2009-12-09

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
3,271		30,348	-27,077
28,848		63,948	-35,100
46,526		7,422	39,104
7,820		38,937	-31,117
4,028		6,036	-2,008
27,394		28,460	-1,066
565		298	267
11,760			11,760
10,332			10,332
4,000		6,375	-2,375
4,801		9,099	-4,298
33,939		36,064	-2,125
35,237		3,377	31,860

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-27,077
			-35,100
			39,104
			-31,117
			-2,008
			-1,066
			267
			11,760
			10,332
			-2,375
			-4,298
			-2,125
			31,860

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Stewart E Barlow MD	Director 0 00	0		
310 E 4500 South Ste 500 Salt Lake City, UT 84107				
Val J Bateman MHA MBA	Sec/Treasurer 1 00	0		
310 E 4500 South Ste 500 Salt Lake City, UT 84107				
George W Cannon MD	Director 0 00	0		
310 E 4500 South Ste 500 Salt Lake City, UT 84107				
F James Cowan	Director 0 00	0		
310 E 4500 South Ste 500 Salt Lake City, UT 84107				
John Gates	Director 0 00	0		
310 E 4500 South Ste 500 Salt Lake City, UT 84107				
Richard Horne	Director 0 00	0		
310 E 4500 South Ste 500 Salt Lake City, UT 84107				
Val B Johnson MD	Director 0 00	0		
310 E 4500 South Ste 500 Salt Lake City, UT 84107				
Scott A Leckman MD	Director 0 00	0		
310 E 4500 South Ste 500 Salt Lake City, UT 84107				
Richard J Sperry MD	Chairman 0 00	0		
310 E 4500 South Ste 500 Salt Lake City, UT 84107				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Community Nursing Services383 W Vine St 300 Murray, UT 84123			Children's Immunizations	8,000
Healthinsight348 E 4500 South Salt Lake City, UT 84107			Website Design	20,000
Intermountain Therapy Animals4050 South 2700 East Salt Lake City, UT 84124			Training Pet-Partner Teams	1,500
Doctors Free Clinic of St George1036 E Riverside Dr St George, UT 84790			Expand Hypertension Clinic	15,000
Community Health Connect250 West Center St Suite 112 Provo, UT 84601			Fund Care Coordination Services	8,000
America West Center1995 de Trobriand St FD 618C Salt Lake City, UT 84113			To Document Polio Treatments and Outcomes	9,863
Fourth Street Clinic404 South 400 West Salt Lake City, UT 84101			To Fund Electronic Medical Records System	15,000
South Valley Sanctuary IncPO Box 1028 Salt Lake City, UT 84103			Inhouse Programs for Abused Women & Children	3,000
Intermountain PKU Allied Discord Alliance4165 Bevwood Circle Salt Lake City, UT 84124			Grant for PKU Starter Kit	2,000
Division of Pediatrics University of Utah50 N Medical Dr Salt Lake City, UT 84132			Develop Pilot QI Pt Centered Med Home Model	10,000
KUED Public Television101 Wasatch Dr Room 215 Salt Lake City, UT 84112			To Produce Program on Aging, Healthcare Reform	10,000
Midvale Family Health Clinic7852 S Pioneer St Midvale, UT 84047			Health Screenings to Vulnerable Individuals	9,625
Weber State University4018 University Circle Ogden, UT 84408			Dental Sealant Program for Children	5,000
Planned Parenthood of Utah654 S 900 East Salt Lake City, UT 84102			Planned Parenthood Education Programs	5,000
Rape Recovery Center2035 South 1300 East Park City, UT 84098			Services to Sexual Assault Victims	5,000
Total ▶ 3a				157,588

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
The Peoples Health Clinic1251 Kearns Blvd PO Box 681558 Park City, UT 84068			Operational Expenses for Clinic	10,000
Health Access Project Community Health Centers Inc1800 South West Temple Suite A -1 Salt Lake City, UT 84115			Assisting Low Income Individuals to Enroll in Public Health	20,600
Total				3a 157,588

TY 2009 Accounting Fees Schedule

Name: UTAH MEDICAL ASSOCIATION FOUNDATION

EIN: 87-6122299

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Reviewed Financials, 990- PF Prep	3,770		3,770	

TY 2009 Distribution from Corpus Election

Name: UTAH MEDICAL ASSOCIATION FOUNDATION

EIN: 87-6122299

Election: The UMA Foundation elects to treat the excess distributions from 2009 as a distribution from corpus.

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2009 Gain/Loss from Sale of Other Assets Schedule

Name: UTAH MEDICAL ASSOCIATION FOUNDATION
EIN: 87-6122299

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
Colonial Properties Tr	2005-04	Merger share exchange	2009-03	Zions Direct	3,271	30,348			-27,077	
Ameren Corp Com	2005-07	Purchase	2009-05	Zions Direct	28,848	63,948			-35,100	
Weels Fargo & Co New Com	2003-07	Purchase	2009-05	Zions Direct	46,526	7,422			39,104	
Developers Diversified Realty	2003-03	Purchase	2009-06	Zions Direct	7,820	38,937			-31,117	
Extra Space Storage Inc Com	2003-03	Purchase	2009-06	Zions Direct	4,028	6,036			-2,008	
Extra Space Storage Inc Com	2008-12	Purchase	2008-06	Zions Direct	27,394	28,460			-1,066	
Developers Diversified Realty	2003-03	Purchase	2009-10	Zions Direct	565	297			268	
Kinder Morgan Energy Ptnrs-dist in excess of basis	2000-04	Purchase	2009-11	Not applicable	11,760				11,760	
TC Pipelines LP-dist in excess of basis	2000-04	Purchase	2009-11	Not applicable	10,332				10,332	
Extra Space Storage Inc Com	2004-06	Purchase	2009-06	Merrill Lynch	4,000	6,375			-2,375	
Extra Space Storage Inc Com	2007-06	Purchase	2009-06	Merrill Lynch	4,801	9,099			-4,298	
Dow Chemical	2000-04	Purchase	2009-12	Merrill Lynch	33,939	36,064			-2,125	
Xilinx Inc	2000-04	Purchase	2009-12	Merrill Lynch	35,237	3,377			31,860	

TY 2009 Investments Corporate
Stock Schedule

Name: UTAH MEDICAL ASSOCIATION FOUNDATION
EIN: 87-6122299

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Applied Materials Inc.	55,760	55,760
Bank of America Corp 7.25% Pfd	66,900	66,900
Blackrock Pfd Inc Strategies	161,336	161,336
BP PLC Spons ADR	86,955	86,955
ChevronTexaco Corp	153,980	153,980
Conoco Phillips	161,075	161,075
Dell Inc Com	24,412	24,412
Dominion Resources Inc VA Com	183,080	183,080
DTE Energy Company	43,590	43,590
Equity Residential SHS Ben Int	71,613	71,613
General Electric Co Com	15,130	15,130
GNMA P183886	1,311	1,311
GNMA P193501	181	181
GNMA P392246	2,847	2,847
GNMA P401191	1,048	1,048
GNMA Pool 474208 7.0% 5/15/28	2,384	2,384
Henry Schein Inc	105,200	105,200
Highwood Properties Inc	50,025	50,025
Intel Corp	48,960	48,960
John Hancock Invs Tr Sh Ben	146,160	146,160
Kinder Morgan Energy Partners	170,744	170,744
MDU Res Group Inc	106,200	106,200
Northwest Corp Com New	104,080	104,080
Pimco Commerical Mtg	298,875	298,875
Plains All American Pipeline L.P.	158,550	158,550
Questar Corp	124,710	124,710
Schlumberger Ltd	130,180	130,180
TC Pipelines LP	184,200	184,200
Wells Fargo Cap XII Enhanced Tr	51,340	51,340
Xilinx Inc	37,590	37,590

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Zions Bancorp	15,396	15,396
Zions Capital Tr B 8%	325,630	325,630

TY 2009 Other Assets Schedule

Name: UTAH MEDICAL ASSOCIATION FOUNDATION

EIN: 87-6122299

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Rounding		1	1

TY 2009 Other Expenses Schedule

Name: UTAH MEDICAL ASSOCIATION FOUNDATION

EIN: 87-6122299

Description	Revenue and Expenses per Books	Net Invest ment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment Management Fees	13,727	13,727		
Other Partnership Expenses	1,347	1,255	92	
Partnership Ordinary Losses	945	945		

TY 2009 Other Increases Schedule

Name: UTAH MEDICAL ASSOCIATION FOUNDATION

EIN: 87-6122299

Description	Amount
Unrealized Gains in Securities	553,220

TY 2009 Other Professional Fees Schedule

Name: UTAH MEDICAL ASSOCIATION FOUNDATION

EIN: 87-6122299

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Support Service Reimbursement to UMA	4,100		4,100	

TY 2009 Taxes Schedule

Name: UTAH MEDICAL ASSOCIATION FOUNDATION

EIN: 87-6122299

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
2008 Federal Tax	2,904		2,904	