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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

		of the Treasury	Note. The for		reated as a ne able to use a c				ortina requirements	ZUU9
Internal Revenue Service Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements For calendar year 2009, or tax year beginning , and ending										
G Check all that apply: Initial return Initial return of a former public charity Final return										
			Amended i			dress chan	•		Name change	
Use the IRS Name of foundation								A Employer identification	number	
ı	abel.	HENRY	AND ETTA		IRSCH H	ERITA	GE		l	
			ATION, INC					,	90-0292867	
	print r type		street (or P O box number	er if mail is not de	Invered to street add	dress)		Room/suite	B Telephone number	٥٢
	Spec	2700	DELK ROAD					100	770-257-01	
	ructio	City of tow	vn, state, and ZIP code TTA, GA 3	0067					C if exemption application is pe	
	hook	type of organiz			empt private fou	ndation		 -	D 1. Foreign organizations 2. Foreign organizations me check here and attach co	eting the 85% test,
<u> </u>	_) nonexempt charitable	· '	empt private lou Other taxable pri		ition			
L Fa			assets at end of year	J Accounting		X Cash	Acc	rual	E If private foundation state under section 507(b)(1)	
		Part II, col. (c),	-	. —	her (specify)	LA CUSII	/100i		F If the foundation is in a 6	• **
,,,			1,447,501.			on cash l	basis.)		under section 507(b)(1)	
		Analysis of R	evenue and Expenses		(a) Revenu	e and		nvestment	(c) Adjusted net	(d) Disbursements
		The total of amo	ounts in columns (b), (c), ar al the amounts in column (nd (d) may not	expenses pe	er books		ome	income	for charitable purposes (cash basis only)
			gifts, grants, etc., rece			248.				
	2	Check X	if the foundation is not required t	to attach Sch B			-			
	3	Interest on saving cash investments	gs and temporary			,357.		2,765		STATEMENT 1
	4	Dividends and	interest from securities	S	14	,116.	1	3,807	•	STATEMENT 2
ર્સ	5a	Gross rents							<u> </u>	
×	b	Net rental income	e or (loss)			<u> </u>			<u> </u>	
Z g		Net gain or (loss) Gross sales price	from sale of assets not on for all		-59	,672.				
	ט	assets on line 6a		,284.				0		
J €	· ·		ncome (from Part IV, line 2)						•	
_		Net short-term	, ,						 	
2	102	Income modeli Gross sales less and allowances	returns RECEIN	∕ED ¯						
4		Less Cost of goo	odsisold	7						· · · · · · ·
ور			Hoss) JAN 0 7	2011 C	1	_				
ა		Other income	4	2011 [6	-5	,144.		5,144	. 0.	STATEMENT 3
⊃ ====================================			es 1 through 11	<u> </u> <u> </u>	-47	,095.	1	1,428	. 0.	
	13	Compensation of	Lotticers, directors, trusted	s, etc		0.		0	. 0.	0.
	14	Other employe	e salaries and wages							
es			, employee benefits							
nse	l	Legal fees	O.F.	nem 4		E E A		4 550	ļ	
ĝ		Accounting fee		MT 4	4	,550.		4,550	0.	0.
e Ü		Other profession	onariees							
ativ	l	Taxes	ST	тмт 5		550.		513	. 0.	0.
istr	19	Depreciation a							-	
Ë		Оссиралсу							-	
Ad	1		ences, and meetings							
pue	1	Printing and pr	_							
g	23	Other expense	s Si	MT 6	4	,517.		4,517	0.	0.
rati	24	Total operatin	ig and administrative							
Operating and Administrative Expens			d lines 13 through 23		9	,617.		9,580	. 0.	0.
J			gifts, grants paid		53	,123.			-	53,123.
	26	=	es and disbursements.	•	62	740		0 500		E2 122
_	07	Add lines 24 a			02	<u>,740.</u>	<u> </u>	9,580	• • •	53,123.
		Subtract line 2			_100	,835.				
	,		ie over expenses and disbi nt income (il negative, en		109	,055.		1,848		
			INCOME (if negative, enter					_,010	0.	
9235 02-0			rivacy Act and Paperw		Act Notice, see	the instruc	tions.			Form 990-PF (2009)

Form 990-PF (2009)

FOUNDATION, INC.

90-0292867

Page 2

ГБ	art	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End o	f year
	arc	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing		-1.	-1.
	2	Savings and temporary cash investments	1,006,604.	341,749.	341,749.
	3	Accounts receivable ►			
		Less: allowance for doubtful accounts ▶			•
	4	Pledges receivable ▶			ę.
		Less: allowance for doubtful accounts	-	* =	r some or some h
	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			
S	8	Inventories for sale or use			
Assets		Prepaid expenses and deferred charges			
As	1	Investments - U.S. and state government obligations			
		Investments - corporate stock		· · · · · · · · · · · · · · · · · · ·	
		· •			
		Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis		no management and and and an	the same and the same of the s
	١.,	Less accumulated depreciation			
		Investments - mortgage loans	F01 40C	1 105 753	1 105 752
		Investments - other STMT 7	501,406.	1,105,753.	1,105,753.
	14	Land, buildings, and equipment; basis			at a constant to all
		Less accumulated depreciation			
	15	Other assets (describe			
	1	:			
	16	Total assets (to be completed by all filers)	1,508,010.	1,447,501.	1,447,501.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
S	19	Deferred revenue			· * 3,
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
abi	21	Mortgages and other notes payable			
=	22	Other liabilities (describe STATEMENT 8)	244.	37.	, ,
		·			
	23	Total liabilities (add lines 17 through 22)	244.	37.	
_		Foundations that follow SFAS 117, check here	· · · · · · · · · · · · · · · · · · ·	· ···-	
		and complete lines 24 through 26 and lines 30 and 31.			>
ė	24	Unrestricted			**
ance	25	Temporarily restricted			ļ
3ali	ı	Permanently restricted			
ğ	["	Foundations that do not follow SFAS 117, check here			
Ē		and complete lines 27 through 31.			<u>.</u>
ō	27		1,507,766.	1,447,464.	
Net Assets or Fund Bala	27		0.	0.	
188	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.		
et A	29	Retained earnings, accumulated income, endowment, or other funds	1,507,766.	1,447,464.	
ž	30	Total net assets or fund balances	1,307,700.	1,447,404.	
	۰	T-1-1 17-1-11141	1 500 010	1 447 501	'
_	31	Total liabilities and net assets/fund balances	1,508,010.	1,447,501.	
P	art	III Analysis of Changes in Net Assets or Fund B	alances		
=					
1		I net assets or fund balances at beginning of year - Part II, column (a), line	30		1 505 566
	-	st agree with end-of-year figure reported on prior year's return)		1	1,507,766.
2		r amount from Part I, line 27a		2	-109,835.
3		r increases not included in line 2 (itemize) BOOK/TAX AD	JUSTMENT	3	49,533.
4		lines 1, 2, and 3		4	1,447,464.
5		eases not included in line 2 (itemize)	<u> </u>	5	0.
6	Tota	I net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	lumn (b), line 30	6	1,447,464.
					Form 990-PF (2009)

90-0292867 Page 3

Part IV Capital Gains ar	nd Losses for Tax on Ir	vestment	Income						
	e the kind(s) of property sold (e.g house; or common stock, 200 shs			(b) I	(b) How acquired P - Purchase D - Donation			cquired ly, yr.)	(d) Date sold (mo., day, yr.)
1a				Г					
b SEE ATTACHED	STATEMENT								
<u>c</u>				-					
<u>d</u>				-					
<u>e</u>	(f) Depreciation allowed	(a) Cos	t or other basis	Ь Т			(h) Ga	ın or (loss)	\
(e) Gross sales price	(or allowable)		xpense of sale	į				(f) minus (
a		_		_					
<u>b</u>	 	_		-					
d		_							
e 37,284.			96,95	6.					-59,672.
Complete only for assets showing	gain in column (h) and owned by	the foundation				(1)	Gains (Co	ol. (h) gain	minus
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(, -	cess of col. (ı) col. (ı), ıf any	-		col.	(k), but n Losses (ot less that from col. (1 -0-) or h))
a									
b									
С				_					
d									-59,672.
e				┪					-39,012.
2 Capital gain net income or (net capi	tal loss) $ \begin{cases} \text{if gain, also enter} \\ \text{if (loss), enter -0} \end{cases} $	r in Part I, line - in Part I, line	7 7	}	2				-59,672.
3 Net short-term capital gain or (loss)		nd (6):		٦	İ				
If gain, also enter in Part I, line 8, co If (loss), enter -0- in Part I, line 8	olumn (c).			- ∤I	3			N/A	
Part V Qualification Un	der Section 4940(e) for	Reduced	Tax on Net	Inv	_	nent Inc	ome		·
(For optional use by domestic private for									
		` ,			•				
If section 4940(d)(2) applies, leave this	part Diank.								
Was the foundation liable for the section			-	rıod?					Yes X No
If "Yes," the foundation does not qualify 1 Enter the appropriate amount in each				00					· -
(a)		uctions before	making any entit	(C)					(d)
Base period years Calendar year (or tax year beginning	(b) Adjusted qualifying dis	tributions	Net value of no			use assets	(Distrib col. (b) div	(d) oution ratio rided by col. (c))
2008		4,171.	-		86	7,536		(-, -, -,	.350615
2007		0,867.		1	,27	9,932	•		.266316
2006		2,387.		1		5,528			.242314
2005	3	4,103.				0,165			.061987
2004		0.				4,251	•		.000000
2 Total of line 1, column (d)							2		.921232
3 Average distribution ratio for the 5-	•	on line 2 by 5,	or by the number	of ye	ears				104046
the foundation has been in existence	e if less than 5 years						3		.184246
4 Enter the net value of noncharitable	-use assets for 2009 from Part X,	line 5					4		1,346,412.
5 Multiply line 4 by line 3							5		248,071.
6 Enter 1% of net investment income	(1% of Part I, line 27b)						6		18.
7 Add lines 5 and 6							7		248,089.
8 Enter qualifying distributions from Part XII, line 4				8		53,123.			
If line 8 is equal to or greater than li See the Part VI instructions.	ine 7, check the box in Part VI, line	e 1b, and comp	oiete that part usir	1g a 1	% tax	rate.			

HENRY AND ETTA RAYE HIRSCH HERITAGE FOUNDATION INC.

	J-029.			age 4
Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 494	8 - see	instru	ctior	1S)
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)				
	1			<u>37.</u>
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)				,
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2			<u>0.</u>
3 Add lines 1 and 2	3			37.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4			0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5			37.
6 Credits/Payments:				
a 2009 estimated tax payments and 2008 overpayment credited to 2009 6a				ļ
b Exempt foreign organizations - tax withheld at source 6b				i i
c Tax paid with application for extension of time to file (Form 8868)				
d Backup withholding erroneously withheld 6d		-		.]
7 Total credits and payments Add lines 6a through 6d	7			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 SEE STATEMENT 9	9			37.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10			
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ▶ Refunded ▶	11			
Part 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	
any political campaign?		1a		X
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 of	or			
distributed by the foundation in connection with the activities.		1		
c Did the foundation file Form 1120-POL for this year?		1c		X
d 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 .				
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation				1
managers. ▶ \$ 0 .				
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?		2		<u>X</u>
If "Yes," attach a detailed description of the activities				
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or				
bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	_	4a		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	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				3
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:		1 1		1
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	N	1 1		ا ا
remain in the governing instrument?		6	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year?		7	X	
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)				
GA				
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 1		
of each state as required by General Instruction G? If "No," attach explanation		8b	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendary	ar			
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
			DE:	2009)

Form 990-PF (2009) FOUNDATION, INC. 90-029	2867	ا	Page 5
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			
sèction 512(b)(13)? If "Yes," attach schedule (see instructions)	11		<u> </u>
12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before			
August 17, 2008?	12		<u> </u>
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address ► N/A			
14 The books are in care of ► DAVID_HIRSCH Telephone no. ► 770-2		<u> 125</u>	
Located at ► 2700 DELK ROAD SUITE 100, MARIETTA, GA ZIP+4 ►	0067		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		▶	Ш
and enter the amount of tax-exempt interest received or accrued during the year	N	<u>/A</u>	
Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required			
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
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?			
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
a disqualified person?			
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
(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			
for the benefit or use of a disqualified person)?	ļ		,
(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.)			i
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)?	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			v
before the first day of the tax year beginning in 2009?	1c		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation			!
defined in section 4942(j)(3) or 4942(j)(5)):			
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? Yes X No	-		
	1		
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		, I	, I
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 instructions.) N/A	2b		~ -
, ·	20		
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	1	,	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
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	l	*	1
May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose			
of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C,			
Form 4720, to determine if the foundation had excess business holdings in 2009.) N/A	3b		-
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		Х
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that	"		├ <u></u>
had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	-	x
	orm 990	-PF	

Form 990-PF (2009) FOUNDATION, INC.			90-02928	<u>ь/</u>	Page 6
Part VII-B Statements Regarding Activities for Which I	Form 4720 May Be	Required (contin	nued)		
5a During the year did the foundation pay or incur any amount to:					
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	1 4945(e)) ?	Y	es X No		
(2) Influence the outcome of any specific public election (see section 4955); of	r to carry on, directly or indir				
any voter registration drive?			es X No	İ	
(3) Provide a grant to an individual for travel, study, or other similar purposes	?	Y	es X No		
(4) Provide a grant to an organization other than a charitable, etc., organizatio	n described in section	_			
509(a)(1), (2), or (3), or section 4940(d)(2)?		Y	es X No		
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or				
the prevention of cruelty to children or animals?		Y	es 🗶 No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	der the exceptions described	ın Regulations			
section 53.4945 or in a current notice regarding disaster assistance (see instru	ctions)?		N/A	5b	
Organizations relying on a current notice regarding disaster assistance check h	ere				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fi	rom the tax because it mainta	ined			
expenditure responsibility for the grant?			es 🔲 No		
If "Yes," attach the statement required by Regulations section 53 494	5-5(d)				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	• •				1.
a personal benefit contract?	F, F		es X No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?		-	6ь	X '
If "Yes" to 6b, file Form 8870.			<u> </u>	-	+
7a At any time during the tax year, was the foundation a party to a prohibited tax s	helter transaction?		es X No		
b If yes, did the foundation receive any proceeds or have any net income attribute				7b	 '
Information About Officers Directors Trust		nagers Highl			
Part VIII Paid Employees, and Contractors	ecs, roundation me	inagers, mgm	,		
1 List all officers, directors, trustees, foundation managers and their	compensation.				
	(b) Title, and average	(c) Compensation	(d) Contributions to	(e)	Expense
(a) Name and address	hòurs per week devoted to position	(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred	acco	Expense unt, other wances
	to position	Citer 0-)	compensation	unc	
			-		
SEE STATEMENT 12		0.	0.		0.
DEE STATEMENT 12		· ·	- 0.		•••
			1		
	<u> </u>		<u> </u>		
				•	
			<u> </u>		
2 Compensation of five highest-paid employees (other than those inc		enter "NONE."	I (d) combine		F
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	(d) Contributions to employee benefit plans	(e) acco	Expense unt, other
	devoted to position		and deferred compensation	allo	wances
NONE					
		İ			
				L	
Total number of other employees paid over \$50,000			•	_	0
			Form	990-P	F (2009)

923551 02-02-10

Form 990-PF (2009) 90-0292867 Page 7 FOUNDATION, INC. Information About Officers, Directors, Trustees, Foundation Managers, Highly Part VIII Paid Employees, and Contractors (continued) 3 Five highest-paid independent contractors for professional services. If none, enter "NONE." (a) Name and address of each person paid more than \$50,000 (c) Compensation (b) Type of service 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 N/A Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2. Amount N/A

Form **990-PF** (2009)

Total. Add lines 1 through 3

All other program-related investments. See instructions.

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	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	455.447.
	Average of monthly cash balances	1b	455,447. 911,469.
C	Fair market value of all other assets	1c	'-
d	Total (add lines 1a, b, and c)	1d	1,366,916.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,366,916.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	20,504.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,346,412.
6	Minimum investment return. Enter 5% of line 5	6	67,321.
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.)	id certain	
1	Minimum investment return from Part X, line 6	1	67,321.
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	37.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	67,284.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	67,284.
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	67,284.
P	art XII Qualifying Distributions (see 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	53,123.
b	Program-related investments - total from Part IX-B	1b	0.
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:		
	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	53,123.
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	53,123.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of 4940(e) reduction of tax in those years.	qualifies fo	r the section

Form **990-PF** (2009)

Page 9

HENRY AND ETTA RAYE HIRSCH HERITAGE FOUNDATION, INC.

Destributable amount for 2009 from Part XI, Ine 7 67, 284.	•	(a)	(b)	(c)	(d)
Initial 2 Lindest Design Community 1 10 10 10 10 10 10 10		Corpus	Years prior to 2008	2008	2009
a Enter amount for 2006 only b Total for prior years: Total for prior years:	· •				67,284.
\$ Excess distributions carryover, if any, to 2009; a From 2004 \$ From 2005 \$ 6,699, e From 2006 \$ 288,537, \$ 67000 \$ 278,688, e From 2008 \$ 261,282, \$ 17 total of less 3s through a 4 Qualifying distributions for 2009 from Part XII, time 4; \$ 53,123, a Applied to 2008, but not more than line 2a \$ Applied to 2008, but not more than line 2a \$ Applied to 2008, but not more than line 2a \$ Applied to undistributed norme of prior years (Election required -see instructions) c Treated as distributions out of corpus \$ Ferraming amount distributed out of corpus \$ Ferraming amount distributed out of corpus \$ Ferraming amount distributed out of corpus \$ Ferraming amount distributed out of corpus \$ Ferraming amount distributed out of corpus \$ Ferraming amount distributed out of corpus \$ Ferraming amount distributed out of corpus \$ Ferraming amount distributed out of corpus \$ Ferraming amount distributed out of corpus \$ Ferraming amount distributed out of corpus \$ Ferraming amount distributed out of corpus \$ Ferraming amount distributed out of corpus \$ Ferraming amount distributed not concern to the corpus \$ Ferraming amount distributed in corpus \$ Ferraming amount distributed in corpus \$ Ferraming amount distributed in corpus \$ Ferraming amount distributed in corpus \$ 14,161. 14,161. 14,161. 14,161. 14,161. 20. 20. 20. 20. 20. 20. 20. 2	2 Undistributed income, if any, as of the end of 2009				
2 Excess distributions carryover, if any, to 2009: a From 2004 b From 2005	a Enter amount for 2008 only			0.	
3 Excess distributions carryover, if any, to 2008: a From 2004 b From 2006	b Total for prior years:		0.		
DFrom 2005	3 Excess distributions carryover, if any, to 2009:				
EFrom 2006	a From 2004				
From 2007 278,588 261,282 2	b From 2005 6,699.				
From 2008 261,282 Total of lines 3a through e 835,206 Analysing distributions for 2009 from Part XII, line 4: ▶ \$ 53,123 Applied to undistributed income of prior years (Election required - see instructions) (Election required - see i	c From 2006 288,537.				
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4a from line 2a. Taxable amount - see instr. † 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 c. rryover to 2010. Subtract lines 7 and 8 from line 6a 10. Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 281,075. c Excess from 2008 261,282.	amount - see instructions		0.		
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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 c. rryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2006 b Excess from 2006 c Excess from 2007 d Excess from 2007 d Excess from 2008 281,075. c Excess from 2008 261,282.	F				
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 c. rryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 dExcess from 2008 261, 282.					
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 c. rryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2007 d Excess from 2008 281,075. c Excess from 2008 261,282.					^
corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8	- · · · · · · - · · ·				<u> </u>
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 c. rryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2007 278,688. d Excess from 2008 261,282.					
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions c. rryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 281,075. c Excess from 2007 278,688. d Excess from 2008		0			
not applied on line 5 or line 7 9 Excess distributions c. rryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 281,075. c Excess from 2008					
9 Excess distributions c. rryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 dExcess from 2008 261,282.	-	ا ۱			
Subtract lines 7 and 8 from line 6a 821,045. 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 261,282.	F	- 0.			
10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 281,075. 278,688. 261,282.		821 045			
a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 281,075. 278,688. 261,282.	F	021,047.			
b Excess from 2006 281,075. c Excess from 2007 278,688. d Excess from 2008 261,282.	· · · · · · · · · · · · · · · · · · ·				
c Excess from 2007 278,688. d Excess from 2008 261,282.			ļ		
dExcess from 2008 261, 282.					

923581 02-02-10

Form **990-PF** (2009)

Form 990-PF (2009) FOUNDATION, INC. 90-0292867 Page 10 Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A 1 a 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 4942(1)(5) b Check box to indicate whether the foundation is a private operating foundation described in section Tax year Prior 3 years 2 a Enter the lesser of the adjusted net (b) 2008 (e) Total (a) 2009 (c) 2007 (d) 2006 income from Part I or the minimum investment return from Part X for each year listed **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 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 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 Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets Part XV at any time during the year-see the instructions.) 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. Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here \(\sum X \) 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 instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d. a The name, address, and telephone number of the person to whom applications should be addressed: b The form in which applications should be submitted and information and materials they should include: c Any submission deadlines. d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

923601 02-02-10

FOUNDATION, INC.

Form 990-PF (2009)

90-0292867 Page 11

3 Grants and Contributions Paid During the	Year or Approved for Future	Payment		
Recipient	If recipient is an individual,		Durance of areast as	
Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				······
,				
		:		
		1		
]	
			1	
		1		
SEE STATEMENT 13				
Total			▶ 3a	53,123
b Approved for future payment				
			1	
NONE				
<u> </u>			<u></u>	
Total			▶ 3b	0
923611 02-02-10			Fo	orm 990-PF (2009

Form 990-PF (2009)

FOUNDATION, INC.

90-0292867 Page 12

Part XVI-A Analysis of Income-Prod	-				
Enter gross amounts unless otherwise indicated.	(a) Business	ousiness income (b)	(C) Exclu-	(d)	(e) Related or exempt
1 Program service revenue:	code	Amount	sion	Amount	function income
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			1 4	2 257	
investments			14	3,357.	
4 Dividends and interest from securities			14	14,116.	
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			1 1		
7 Other investment income			14	-5,144.	
8 Gain or (loss) from sales of assets other			18	-59,672.	
than inventory	 		19-	-39,072.	
9 Net income or (loss) from special events	<u> </u>				
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a	-				<u> </u>
b	-				_
d	- 				
e	- -		- 		
12 Subtotal. Add columns (b), (d), and (e)			0.	-47,343.	0.
13 Total. Add line 12, columns (b), (d), and (e)			<u> </u>	13	
(See worksheet in line 13 instructions to verify calculations.)	1			"—	17,545.
Part XVI-B Relationship of Activities		plishment of	Exempt P	urposes	
Line No. Explain below how each activity for which in				Importantly to the accomp	lishment of
the foundation's exempt purposes (other that	an by providing tunds	s for such purposes	<u>). </u>		
					
					
					
		 			·
		· · · · · · · · · · · · · · · · · · ·			
 					
	-				
					
					
				· · · · · · · · · · · · · · · · · · ·	
	 				
	· · · · · · · · · · · · · · · · · · ·				
		· · -			
			· · · · · · · · · · · · · · · · · · ·		
					

	NDATION, INC.		90-02	292867	Pa	age 13
		rs To and Transactions	and Relationships With Nonc	haritable)	
Exempt Org	anizations					
		e following with any other organizati			Yes	No
the Code (other than section 50	1(c)(3) organizations) or in s	ection 527, relating to political orgai	nizations?			
a Transfers from the reporting for	indation to a noncharitable e	xempt organization of:				l
(1) Cash				1a(1)		X
(2) Other assets				1a(2)		X
b Other transactions:					_	
(1) Sales of assets to a noncha	ritable exempt organization			1b(1)		X
(2) Purchases of assets from a	noncharitable exempt organ	ızatıon		1b(2)		X
(3) Rental of facilities, equipme				1b(3)		X
(4) Reimbursement arrangeme	nts			1b(4)		X
(5) Loans or loan guarantees				1b(5)		X
(6) Performance of services or				1b(6)		X
c Sharing of facilities, equipment,				1c		X
		• • •	ways show the fair market value of the good		ets,	
• •	=		ue in any transaction or sharing arrangeme	it, show in		
column (d) the value of the good			1 (4)			
1)Line no (b) Amount involved		charitable exempt organization	(d) Description of transfers, transactions,	and sharing arra	angeme	ents
		N/A				
						
<u></u>						
		-				
				-		
 						
			- 			
	- 					_
la Is the foundation directly or indi	rectly affiliated with, or relate	d to, one or more tax-exempt organ	zations described			
in section 501(c) of the Code (o		·		Yes	X] No
b If "Yes," complete the following s	schedule.					
(a) Name of	organization	(b) Type of organization	(c) Description of relati	onship		
N/I	4					
						
		uding accompanying schedules and stater based on all information of which prepare	nents, and to the best of my knowledge and belief,	it is true, correc	it.	
	Hinah)	1/5// 200	•			
\ ////\ \b\(\lambda\)	YH / K/IF // /	1/5//////	\			

Form **990-PF** (2009)

Preparer's identifying number

Date

Signature of officer or trustee

Preparer's signature

Title

Check if self-employed ► [

ZIN ▶

Phone no.

Form 8868 (Rev. 4-2009)			Page 2				
 If you are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II and check this bo Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed If you are filing for an Automatic 3-Month Extension, complete only Part I (on page 1). 	Form		▶ [X]				
Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no co	pies	needed).					
Name of Exempt Organization HENRY & ETTA RAYE HIRSCH HERITAGE FOUNDATION, INC.	Ĭ	0-02928					
Number, street, and room or suite no. If a P.O. box, see instructions. For IRS use only clue date for 2700 DELK ROAD, NO. 100							
return. See City, town or post office, state, and ZIP code. For a foreign address, see instructions. MARIETTA, GA 30067							
Check type of return to be filed (File a separate application for each return): Form 990 Form 990-EZ Form 990-T (sec. 401(a) or 408(a) trust) Form 1041-A Form 990-BL Form 990-PF Form 990-T (trust other than above) Form 4720	= :	orm 5227 C	Form 8870				
STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previous	dy fik	d Form 8868.					
DAVID HIRSCH The books are in the care of ▶ 2700 DELK ROAD SUITE 100 - MARIETTA, GA Telephone No. ▶ 770-257-0125 If the organization does not have an office or place of business in the United States, check this box If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If this box ▶ ☐ If it is for part of the group, check this box ▶ ☐ and attach a list with the names and EINs of all of the interpretation of time until NOVEMBER 15, 2010. For calendar year 2009, or other tax year beginning, and ending, and ending	s is fo	r the whole gro	on is for.				
8 If this tax year is for less than 12 months, check reason: Initial return Final return	ш	Change in acco	punting penod				
7 State in detail why you need the extension ADDITIONAL INFORMATION IS NEEDED TO FILE A COMPLETE AN RETURN.	D A	CCURATE	TAX				
8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	9	0.				
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated							
tax payments made. Include any prior year overpayment allowed as a credit and any amount paid							
previously with Form 8868.	<u>8b</u>	\$	<u> </u>				
c Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit			•				
with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8ç	\$	0.				
Signature and Verification Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the it is true, correct, and complete, and that I am authorized to depare this form.	best o	f my knowledge a	and belief,				
Signature ► CPA	Date		12/() 88 (884 4-2009)				

Taxpayer No. 58-6415296

Page

HENRY & ETTA RAYE HIRSCH

2009 ANNUAL STATEMENT SUMMARY

Your Tax Reporting Statement information that follows is a personal summary of your account activity and is not reported to the IRS.

The Capital Gain and Loss Transaction section is provided to facilitate your review and may not include return of capital sales load deferral, or wash sales adjustments. RICs (which may include mutual lurds and unit investment trusts) may reclassify principal distributions as capital gains. The cost basis for the securities may not have been adjusted on your statement to reflect such reclassifications. Please refer to information provided by the RIC and discuss with your fast advisor. Securities distributed from a retirement account reflect the tax basis on the date of distribution. Other methods for cakulating gain (loss) are available. The cost basis for most Original issue Discount ("OID") obligations includes the accretion of OID. For purposes of allocating original purchase price to the components of all equity unit consisting of a purchase contract and a debt security subject to a remarketing event, we assumed the fair market value of the debt security on purchase date was easier to the gracinase contract. In making adjustments assumed that the unit holder includes contract adjustments in income received. In cast assumed that the unit holder includes an enfect to amoutze premium paid on the purchase of taxable bonds, unless otherwise noticed, it was

Dividend and Interest details are repeated in the following pages for your convenience. Additionally, we have included items such as margin interest and select account fees if applicable. Please discuss the deductibility of these Items with your tax advisor. For select clients, we have also included a summary of Visa charges and checking activity.

Merrill Lynch is neither a tax return preparer or tax advisor. Please see your tax advisor for more information.

2009 CAPITAL GAIN AND LOSS TRANSACTIONS

Security Description	Quantity	Date Acquired Quantity Cover of Short	Date Liquidated Short Sale	d Amortization/Accretion Year-to-Date Life-to-Da	/Accretion Life-to-Date	Sales Price	Cost Basis	Gain or (Loss)
SHORT TERM CAPITAL LOSSES				į				
BANCO SANTANDER SA ADR	21.0000	03/26/08	01/21/09			147.26	410.92	(263.66)
	224.0000	03/27/08	01/21/09			1,570.83	4,457 40	(2,886.57)
	145,0000	03/58/08	01/21/09			1,016.83	2,865.40	(1,848.57)
	320.0000	03/31/08	01/21/09			2,244.07	6,330.30	(4,086.23)
		Security Subtotal	-			4,978.99	14,064.02	(9,085.03)
WELLS FARGO & CO NEW DEL	360.0000	07/16/08	01/21/09			5,260.97	8,720.87	(3,459.90)
		Short Term Capit	erm Capital Losses Subtotal	otal		10,239.96	22,784.89	(12,544.93)
NET SHORT TERM CAPITAL GAIN (LOSS)	(SS)							(12,544.93)
LONG TERM CAPITAL LOSSES	į					i	,	
COHEN AND STEERS QUALITY	585 0000	90/01/50	01/02/08			2,389.12	12,741.31	(10,352.19)
COHEN AND STRS A I RY FD	560.0000	90/10/00	01/20/09			1,826.14	12,925.25	(11,099.11)



Taxpayer No. 58-6415296

Page 8 of 18

HENRY & ETTA RAYE HIRSCH

2009 ANNUAL STATEMENT SUMMARY

2009 CAPITAL GAIN AND LOSS TRANSACTIONS

Security Description	Quantity Caver	Date Acquired Cover of Short	Date Liquidated Short Sale	f Amortization/Accretion Year-to-Date Life-to-Da	n/Accretion Life-to-Date	Sales Price	Cost Basis	Gain or (Loss)
APOLLO INVESTMENT CORP	168.0000	05/10/06	03/04/09			608 18	3 129 82	(2 521 64)
	144.0000	05/10/06	03/02/09			413.99	2,682.71	(57 896 67)
	104,0000	02/10/06	60/90/60			278.54	1,937.51	(1.658.97)
	94.0000	05/10/06	03/09/09			245.96	1,751.21	(1,505.25)
	102.0000	05/10/06	03/11/09			240 08	1,900 26	(1,660.18)
		Security Subtotal	7			1,786.75	11,401.51	(9,614.76)
US BANCORP (NEW)	400.0000	05/10/06	03/04/09			4,242.49	12,732,01	(8,489.52)
		Long Term Capi	Ferm Capital Losses Subtotal	tal		10,244.50	49,800.08	(39,555.58)
NET LONG TERM CAPITAL GAIN (LOSS)								(39,555.58)
TOTAL CAPITAL GAINS AND LOSSES TOTAL REPORTABLE GROSS PROCEEDS DIFFERENCE						20,484.46 20,484.46 0.00	72,584.97	(52,100.51)

REALIZED CAPITAL GAIN AND LOSS SUMMARY

LONG TERM LOSSES	(39,555.58)
LONG TERM GAINS	0.00
SHORT TERM LOSSES	(12,544.93)
SHORT TERM GAINS	00:00
	TOTAL

Note: Capital gains and losses in this statement are not reported to the IRS.

* Difference reflects items that are included in the reportable gross proceeds section of your statement but are not included in the gain/loss section (e.g., liquidation of fractional shares and the proceeds from certain tender offers). It also reflects items that are included in the gain/loss section of your statement but not in the reportable gross proceeds section (e.g., option premium received).

Taxpayer No. 58-6415296

HENRY & ETTA RAYE HIRSCH HERIT

2009 ANNUAL STATEMENT SUMMARY

Your Tax Reporting Statement information that follows is a personal summary of your account activity and is not reported to the IRS.

The Capital Gain and Loss Transaction section is provided to facilitate your review and may not include return of capital, sales load deferral, or wash sales adjustments. RICs (which may include mutual funds and unit investment trusts) may reclassify principal distributions as capital gains. The cost basis for these securities may not have an entirement account reflect the tax basis on the date of distribution. Other methods capital gain (boss) are available. The cost basis for most Original issue Discount ("OID") obligations includes the accretion of OID. For purposes of allocating original purchase contract and a debt security and particular security or purchase contract and a debt security subject to a remarketing event, we assumed the fair make of the debt security or purchase date was equal to its adjusted issue price. The difference between your original cost and the amount allocable to the debt component was allocated to the purchase contract. In making adjustments assumed that the full make assumed that the full holder included contract adjustments in income received. In calculating gain (loss), unless otherwise noted, it was assumed that an election was in effect to amortize premium paid on the purchase of taxable bonds.

Dividend and Interest details are repeated in the following pages for your convenience. Additionally, we have included items such as margin interest and select account fees if applicable. Please discuss the deductibility of these items with your tax advisor. For select clients, we have also included a summary of Visa charges and checking activity.

Merrill Lynch is neither a lax return preparer or tax advisor. Please see your tax advisor for more information.

2009 CADITAL CAIN AND LOSS TRANSACTIONS

		ZOUS CAPITA	2009 CAPITAL GAIN AND LOSS TRANSACTIONS			
Security Description	Quantity	Date Acquired Cover of Short	Date Liquidated Amortization/Accretion Short Sale Year-to-Date Life-to-Date	Sales Price	Cost Basis	Gain or (Loss)
SHORT TERM CAPITAL GAINS	:					
TELKOM SA LTD SP ADR	45.0000	60/90/10	60/90/10	1,115.90	1,115.90	0.00
		Short Term Capi	Short Term Capital Gains Subtotal	1,115.90	1,115.90	0.00
SHORT TERM CAPITAL LOSSES						
AXA ADR	90.0000	09/04/08	03/06/09	698.61	2,943 86	(2.245.25)
BANCO B VIZ ARGT SA ADR	160.0000	06/04/08	03/06/09	934.23	3,468.77	(2.534.54)
BANCO SANTANDER SA ADR	175.0000	06/04/08	01/21/09	1,227.21	3.467.35	(2.240.14)
MACQUARIE GL INFRSTRC TR	53.0000	06/04/08 06/04/08	03/09/09	416.36	1,491.39	(1,075 03)
		Security Subtotal		966.46	3,517.45	(2,550.99)
MACQUARIE/FTGI/UTL D&I	145.0000	06/04/08	03/12/09	937.97	3,484.35	(2,546.38)
COHEN & STEERS WORLDWIDE	205.0000	06/04/08	01/05/09	735.59	3,545,68	(2.810.09)



Taxpayer No. 58-6415296

Page 8 of 18

HENRY & ETTA RAYE HIRSCH HERIT

2009 ANNUAL STATEMENT SUMMARY

LOSS TRANSACTIONS	
$\boldsymbol{\omega}$	
GAIN AN	
2009 CAPITAL	
9 CA	
500	

Security Description	Date Ac Quantity Cover o	Date Acquired Cover of Short	Date Liquidated Au Short Sale Year-t		•	
STOCKLAND				Sales Price	Cost Basis	Gain or (Loss)
	620.0000	09/04/08	03/09/09	858.95	2 827 14	(1 050 10)
		Short Torm Cani	• · · · · · · · · · · · · · · · · · · ·			(1,300.13)
NET SHORT TERM CAPITAL GAIN (LOSS)		-	erin Capital Losses Subtotal	6,359.02	23,254.60	(16,895.58)
						(16,895.58)
OTHER TRANSACTIONS						
BINE PARIBAS EUR RT	25.0000	00/30/08	10/13/00			
BNP PARIBAS DROIT			60/21/01	49.14	N/A	N/A
	25.0000	05/20/09	06/12/09	000	***	:
				8	Z/A	N/A
		Uner Transactions Subtotal	is Subtotal	49.14		
TOTAL CAPITAL GAINS AND LOSSES						
DIFFERENCE				7,524.06	24,370.50	(16,895.58)
Note: Capital gains and losses in this statement are not reported to	o not repo	201 040 04 POT		00.00		(44 948.91)

Note: Capital gains and losses in this statement are not reported to the IRS.

* Difference reflects items that are included in the reportable gross proceeds section of your statement but are not included in the gain/loss section (e.g., liquidation of fractional shares and the proceeds from certain tender offers). It also reflects items that are included in the gain/loss section of your statement but not in the reportable gross proceeds section (e.g., option premium received).

N/A · Results which cannot be calculated because of insufficient data in the Capital Gain or (Loss) Column and are not included in the realized capital gain and loss

REALIZED CAPITAL GAIN AND LOSS SUMMARY

LONG TERM LOSSES 0.00	
LONG TERM GAINS 0.00	
SHORT TERM LOSSES (16,895.58)	
SHORT TERM GAINS 0.00	
TOTAL	

HENRY & ETTA RAYE HIRSCH HERITAGE FOUNDATION SCHEDULE OF AVERAGE FAIR MARKET VALUE FYE 12/31/09

·	Merrill Lynch	Merrill	Merrill		Merrill Lynch			Merrill Lynch	
EOY	Cash 4002	Lynch 4003	Lynch 4003 Lynch 4005	AVG Cash	Securities - 4005	Fixed Income	Active Equity	4003	AVG Securities
DECEMBER	08 999,383	2,659	4,560		276,354	,	•	57.794	
JANUARY	09 999,584	4,637	5,536	1,008,180	279,570	•	•	50,332	332.025
FEBRUARY	09 992,615	4,797	10,621	1,008,895	258,847	•	•	45,887	317,318
MARCH	09 988,246		5,694	1,003,430	267,570	•		47,754	310.029
APRIL	09 982,301	3,213	2,687	995,014	292,361	1	,	53,284	330.484
MAY	09 977,245	1,139	10,648	990,117	305,912	•	1	63,155	357.356
JUNE	762,776 60		11,102	989,640	298,627	1	٠	61,626	364.660
JULY	09 976,193		11,407	990,466	333,458	•	r	66,269	379,990
AUGUST	975,038	3,409	16,780	992,955	326,426	•	1	68.349	397.251
SEPTEMBER 09	96,636		17,253	991,353	342,407	•	,	72.564	404.873
OCTOBER	09 952,127		650	970,182	. •	,	453,553	1	434.262
NOVEMBER	770,035	•	1	651,481	•	602,097	455,367	•	755.508
DECEMBER	09 341,750	1	•	345,914	•	602,688	503,065	1	1.081,608
			· H	\$ 10,937,627.00				۳, ۱	\$ 5,465,364.74
	AVG MONTHLY FMV CASH	WV CASH	\$ 911,468.92		AVG MONTHLY FMV SECURITIES	EMV SECURITI	SS	•	\$ 455,447.06

90-0292867 **PAGE**

Part IV Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase (c) Date acquired (d) Date sold (a) List and describe the kind(s) of property sold, e.g., real estate, (mo., day, yr.) (mo., day, yr.) 2-story brick warehouse; or common stock, 200 shs. MLC Co. D - Donation 1a MERRILL LYNCH 4005 -VARIOUS VARIOUS SEE ATTACHED STATEMENT P b MERRILL LYNCH 4005 P SEE ATTACHED STATEMENT VARIOUS VARIOUS _ c MERRILL LYNCH 4003 VARIOUS SEE ATTACHED STATEMENT P VARIOUS P VARIOUS d FIXED INCOME VARIOUS e ACTIVE EQUITY P VARIOUS VARIOUS P VARIOUS VARIOUS ACTIVE EQUITY g CAPITAL GAINS DIVIDENDS h m n 0 (g) Cost or other basis (h) Gain or (loss) (f) Depreciation allowed (e) Gross sales price plus expense of sale (e) plus (f) minus (g) (or allowable) 10,240. 22,785. -12,545. -39,555.10,245. 49,800. b 24,371 -16,847. 7,524. C 790. 790. d 2,366. 2,366. 6,055. 6,055. 64. 64. h m n 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (j) Adjusted basis (k) Excess of col. (ı) (i) F.M.V. as of 12/31/69 but not less than "-0-") as of 12/31/69 over col. (j), if any -12,545.-39,555. b -16,847. 790. d 2,366. 6,055. 64. h m n 0 { If gain, also enter in Part I, line 7 } If (loss), enter *-0-* in Part I, line 7 } -59,672. 2 2 Capital gain net income or (net capital loss) Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). N/A If (loss), enter *-0-* in Part I, line 8

FORM 990-PF INTEREST ON SAVINGS A	ND TEMPORARY C	ASH	INVESTMENTS	STATEMENT	1
SOURCE				AMOUNT	
ACTIVE EQUITY			•		77.
FIXED INCOME				1,1	
MERRILL LYNCH - 04002 MERRILL LYNCH - 04003				1,9	57. 14.
MERRILL LYNCH - 04005					21.
TOTAL TO FORM 990-PF, PART I, LINE	3, COLUMN A			3,3	57.
FORM 990-PF DIVIDENDS AND	INTEREST FROM	SEC	URITIES	STATEMENT	2
SOURCE	GROSS AMOUNT		PITAL GAINS DIVIDENDS	COLUMN (A AMOUNT)
ACTIVE EQUITY	4,591.		0.	4,5	91.
FIXED INCOME	73.		0.		73.
MERRILL LYNCH - 04002	13.		0.	3,3	13.
MERRILL LYNCH - 04003 MERRILL LYNCH - 04005	3,376. 6,127.		0. 64.	5,3 6,0	
TOTAL TO FM 990-PF, PART I, LN 4	14,180.		64.		
FORM 990-PF O	THER INCOME			STATEMENT	3
DESCRIPTION	(A) REVENUE PER BOOK	S	(B) NET INVEST- MENT INCOME		
DESCRIPTION					
OTHER INVESTMENT INCOME - ML 4005		25.	25		0.
OTHER INVESTMENT INCOME - ML 4003 OTHER PORTFOLIO INCOME - ACTIVE		58.	58	•	0.
EQUITY	-2,	241.	-2,241	•	0.
PTP ACTIVITY	-2,	986.	-2,986	•	0.
TOTAL TO FORM 990-PF, PART I, LINE	11 -5,	144.	-5,144	•	0.

DESCRIPTION	0-PF	UNTING FEES	STATEMENT 4
TO FORM 990-PF, PG 1, LN 16B 4,550. 4,550. 0. FORM 990-PF TAXES STATEMENT (A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARIT PER BOOKS MENT INCOME NET INCOME PURPO IRS 37. 0. 0. 0. FOREIGN TAXES PAID 513. 513. 0. TO FORM 990-PF, PG 1, LN 18 550. 513. 0. FORM 990-PF OTHER EXPENSES STATEMENT (A) (B) (C) (D)		ES NET INVEST- ADJUSTED	
FORM 990-PF TAXES STATEMENT (A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARIT PER BOOKS MENT INCOME NET INCOME PURPO IRS FOREIGN TAXES PAID TO FORM 990-PF, PG 1, LN 18 550. 513. 0. FORM 990-PF OTHER EXPENSES STATEMENT (A) (B) (C) (D)		550. 4,550.	0.
(A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED PER BOOKS MENT INCOME PURPO IRS FOREIGN TAXES PAID 37. 0. 0. 0. TO FORM 990-PF, PG 1, LN 18 513. 513. 0. FORM 990-PF OTHER EXPENSES STATEMENT (A) (B) (C) (D)	990-PF, PG 1, LN 16B	550. 4,550.	0.
DESCRIPTION EXPENSES NET INVEST- ADJUSTED CHARIT PER BOOKS MENT INCOME PURPOUT OF THE PER BOOKS MENT INCOME PURPOUT OF TH	0-PF	TAXES	STATEMENT 5
FOREIGN TAXES PAID 513. 513. 0. TO FORM 990-PF, PG 1, LN 18 550. 513. 0. FORM 990-PF OTHER EXPENSES STATEMENT (A) (B) (C) (D)		ES NET INVEST- ADJUSTED	
FORM 990-PF OTHER EXPENSES STATEMENT (A) (B) (C) (D)	TAXES PAID		
(A) (B) (C) (D)	990-PF, PG 1, LN 18	550. 513. (0.
	0-PF	ER EXPENSES	STATEMENT 6
DESCRIPTION PER BOOKS MENT INCOME NET INCOME PURPO		ES NET INVEST- ADJUSTED	
MERRILL LYNCH ANNUAL MANAGEMENT FEES 3,210. 3,210. 0. BANK CHARGES 142. 142. 0. FIXED INCOME EXPENSES 100. 100. 0. ACTIVE EQUITY EXPENSES 1,065. 1,065. 0.	IENT FEES IARGES INCOME EXPENSES	142. 142. (100. (1	0.
TO FORM 990-PF, PG 1, LN 23 4,517. 4,517. 0.	1 990-PF, PG 1, LN 23	517. 4,517.	0.

FORM 990-PF	OTHER INVESTMENTS		STATEMENT 7
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
FIXED INCOME ACTIVE EQUITY	COST COST	602,688. 503,065.	602,688. 503,065.
TOTAL TO FORM 990-PF, PART	II, LINE 13	1,105,753.	1,105,753.
FORM 990-PF	OTHER LIABILITIES		STATEMENT 8
DESCRIPTION		BOY AMOUNT	EOY AMOUNT
		244.	37.
FEDERAL TAXES PAYABLE			3,.

FORM 990-PF		LIST OF OFFICERS, I		STATI	EMENT 12
NAME AND ADDRESS		TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	
ETTA RAYE HIRSCH 4580 TRAIL NW ATLANTA, GA 30327		DIRECTOR 1.00	0.	0.	0.
LISA HIRSCH GREEN 665 WIDGEON LN NW ATLANTA, GA 30327	BERG	DIRECTOR 1.00	0.	0.	0.
SETH GREENBERG 665 WIDGEON LN NW ATLANTA, GA 30327		DIRECTOR 1.00	0.	0.	0.
DAVID A. HIRSCH 4875 POWERS FERRY ATLANTA, GA 30327	RD NW	DIRECTOR 1.00	0.	0.	0.
MICHELE HIRSCH 4875 POWERS FERRY ATLANTA, GA 30327	RD NW	DIRECTOR 1.00	0.	0.	0.
TOTALS INCLUDED OF	N 990-PF, PA	GE 6, PART VIII	0.	0.	0.

STATEMENT 13

FORM 990-PF

	 _		
RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT		AMOUNT
AMERICAN JEWISH COMMITTEE 20 S. CHARLES ST #412 BALTIMORE, MD 21201	N/A UNRESTRICTED	N/A	1,800.
AMIT 817 BROADWAY NEW YORK, NY 10003	N/A UNRESTRICTED	N/A	6,425.
ATLANTA SCHOLARS KOLLEL 1959 LAVISTA RD NE ATLANTA, GA 30329	N/A UNRESTRICTED	N/A	4,000.
ATLANTA WOMEN'S FOUNDATION 50 HURT PLAZA SE STE 401 ATLANTA, GA 30303	N/A UNRESTRICTED	N/A	875.
BREAST CANCER 3 DAY 205 N. MICHIGAN AVENUE STE 2640 CHICAGO, IL 60601	N/A UNRESTRICTED	N/A	400.
BREMAN JEWISH MUSEUM 1440 SPRING ST. NW ATLANTA, GA 30309	N/A UNRESTRICTED	N/A	250.
CHILDREN'S HEALTHCARE OF ATLANTA 1600 TULLIE CIRCLE NE ATLANTA, GA 30329		N/A	2,500.
CONGREGATION B'NAI TORAH 700 MOUNT VERNON HIGHWAY NE ATLANTA, GA 30328	N/A UNRESTRICTED	N/A	1,503.

GRANTS AND CONTRIBUTIONS

PAID DURING THE YEAR

HENRY AND ETTA RAYE HIRSCH HERI	TAGE FOU		90-0292867
CONGREGATION BETH JACOB 1855 LAVISTA RD NE ATLANTA, GA 30329	•	N/A	2,040.
DAVIS ACADEMY 8105 ROBERTS DRIVE ATLANTA, GA 30350	N/A UNRESTRICTED	N/A	2,500.
HILLELS OF GEORGIA 732 GATEWOOD ROAD NE ATLANTA, GA 30329	N/A UNRESTRICTED	N/A	1,600.
IAN'S FRIENDS FOUNDATION 855 MARSEILLES DRIVE ATLANTA, GA 30327	N/A UNRESTRICTED	N/A	750.
JAZZ FOUNDATION OF AMERICA 322 WEST 48TH STREET 6TH FLOOR NEW YORK, NY 10036		N/A	10,000.
MOTHER'S MILK BANK OF NEW ENGLAND P.O. BOX 60-0091 NEWTONVILLE, MA 02460	N/A UNRESTRICTED	N/A	100.
WORLD ORT 2152 RALPH AVENUE 146 BROOKLYN, NY 11234	N/A UNRESTRICTED	N/A	5,000.
TEL AVIV FOUNDATION 1201 BROADWAY SUITE 802 NEW YORK, NY 10001	N/A UNRESTRICTED	N/A	500.
TEMIMA HIGH SCHOOL 1985-B LAVISTA ROAD ATLANTA, GA 30329	N/A UNRESTRICTED	N/A	150.
THE EPSTEIN SCHOOL 335 COLEWOOD WAY NW SANDY SPRINGS, GA 30328	N/A UNRESTRICTED	N/A	6,400.

HENRY AND ETTA RAYE HIRSCH HER	ITAGE FOU		90-0292867
THE WEBER SCHOOL 6751 ROSWELL ROAD ATLANTA, GA 30328 ·	N/A UNRESTRICTED	N/A	2,600.
TORAH DAY SCHOOL 1985 LAVISTA RD NE ATLANTA, GA 30329	N/A UNRESTRICTED	N/A	540.
WILLIAM BREMAN JEWISH HOME 3150 HOWELL MILL RD. NW ATLANTA, GA 30327	N/A UNRESTRICTED	N/A	1,000.
WOODRUFF ARTS CENTER 1280 PEACHTREE STREET NE ATLANTA, GA 30309	N/A UNRESTRICTED	N/A	150.
YESHIVA ATLANTA 3130 RAYMOND DR. DORAVILLE, GA 30340	N/A UNRESTRICTED	N/A	540.
WIPHAN CARE MINISTRIES 551 COX ROAD ROSWELL, GA 30075	N/A UNRESTRICTED	N/A	1,500.
TOTAL TO FORM 990-PF, PART XV, L	INE 3A	_	53,123.

Form 8	868 (Rev. 4-2009)		Page	2
• If vo	ou are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II and check this bo	x		
•	Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed		8868.	
	ou are filing for an Automatic 3-Month Extension, complete only Part I (on page 1).			
Par	Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no co	pies r	needed).	_
Type o	Name of Exempt Organization HENRY AND ETTA RAYE HIRSCH HERITAGE FOUNDATION, INC.		loyer identification number $0 - 0292867$	÷L
File by t extende due date filing the	Number, street, and room or suite no. If a P.O box, see instructions 2700 DELK ROAD, NO. 100	_	RS use only	_
return S	ee City, town or post office, state, and ZIP code. For a foreign address, see instructions.			_
\Box	k type of return to be filed (File a separate application for each return): Form 990 Form 990-EZ Form 990-T (sec 401(a) or 408(a) trust) Form 990-BL Form 990-PF Form 990-T (trust other than above) Form 4720		orm 5227 Form 887	70
STOP	! Do not complete Part II if you were not already granted an automatic 3-month extension on a previous	sly file	ed Form 8868.	
Tel If ti If ti box 4 5 6 7		s is fo	r the whole group, check the ers the extension is for. Change in accounting periods	— -
	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	s (0.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8a 8b		0.
	Balance Due. Subtract line 8b from line 8a Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	8c	s (0.
	Signature and Verification		<u> </u>	<u> </u>
Under it is tru	penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the e, correct, and complete, and that I am authorized to prepare this form.	best o	f my knowledge and belief,	
Signati	ure ▶ CPA	Date	•	
			Form 8868 (Rev. 4-20	09)

Form 8868	3 (Rev 4-2009)			Page 2
Note. On	are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II and check this body complete Part II if you have already been granted an automatic 3-month extension on a previously filed are filing for an Automatic 3-Month Extension, complete only Part I (on page 1)		_	X.
Part II		opies r	needed).	
Type or print	Name of Exempt Organization HENRY AND ETTA RAYE HIRSCH HERITAGE FOUNDATION, INC.	Employer identification number 90-0292867		umber
File by the extended due date for filing the	Number, street, and room or suite no. If a P.O. box, see instructions. 2700 DELK ROAD, NO. 100	For If	RS use only	
return See instructions	City, town or post office, state, and ZIP code. For a foreign address, see instructions. MARIETTA, GA 30067			
For	rm 990 Form 990-EZ Form 990-T (sec. 401(a) or 408(a) trust) Form 1041-A Form 990-BL X Form 990-PF Form 990-T (trust other than above) Form 4720		orm 5227 Form 6069	m 8870
STOP! D	o not complete Part II if you were not already granted an automatic 3-month extension on a previou	sly file	ed Form 8868.	
Teleph If the complete of this box 4 Ire 5 For 6 If the	cooks are in the care of ▶ 2700 DELK ROAD SUITE 100 - MARIETTA, GAR mone No. ▶ 770-257-0125 FAX No ▶ 770-952-5922 organization does not have an office or place of business in the United States, check this box is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If the lift is for part of the group, check this box ▶ and attach a list with the names and EINs of all equest an additional 3-month extension of time until NOVEMBER 15, 2010. The calendar year 2009, or other tax year beginning , and ending instax year is for less than 12 months, check reason Initial return in the in detail why you need the extension DITIONAL INFORMATION IS NEEDED TO FILE A COMPLETE AND in the complete in the care of the complete in the care of the c	is is fo	r the whole group, chers the extension is for	or g period
RI	ETURN.			
nor	nis application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any prefundable credits. See instructions	8a	\$	0.
tax	b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made include any prior year overpayment allowed as a credit and any amount paid			0.
c Ba	eviously with Form 8868 lance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit	8b	\$	0.
wit	h FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions Signature and Verification	8c	\$	<u> </u>
Under pen ıt ıs true, c	alties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the correct, and complete, and that I am authorized to prepare this form.	e best o	f my knowledge and bel	ef,
Signature	Title CPA	Date	•	