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**Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation****2009**Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning , 2009, and ending

G Check all that apply ☐ Initial return ☐ Initial Return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Use the IRS label otherwise, print or type. See Specific Instructions	THE STOCKDALE FAMILY FOUNDATION 1019 PACIFIC AVE #916 TACOMA, WA 98402		A Employer identification number 91 1663715
			B Telephone number (see the instructions) 253-572-8568
			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"/>	
I Fair market value of all assets at end of year (from Part II, column (c), line 16) \$ 977,265.		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	

Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
REVENUE	1 Contributions, gifts, grants, etc. received (att sch)				
	2 Ck <input checked="" type="checkbox"/> if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments	4,310.	4,310.	4,310.	
	4 Dividends and interest from securities	15,572.	15,572.	15,572.	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10.	-8,277.			
	b Gross sales price for all assets on line 6a	81,482.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain			883.	
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit/(loss) (att sch)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	11,605.	19,882.	20,765.		
ADMINISTRATIVE AND OPERATING EXPENSES	13 Compensation of officers, directors, trustees, etc	0.			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach sch) See St 1	550.			
	c Other prof fees (attach sch) See St 2	8,588.	8,588.		
	17 Interest				
	18 Taxes (attach schedule)(see instr) See Stm 3	829.	384.		
	19 Depreciation (attach sch) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
23 Other expenses (attach schedule)					
24 Total operating and administrative expenses. Add lines 13 through 23	9,967.	8,972.			
25 Contributions, gifts, grants paid Part XV	51,100.			51,100.	
26 Total expenses and disbursements. Add lines 24 and 25	61,067.	8,972.	0.	51,100.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-49,462.				
b Net investment income (if negative, enter -0-)		10,910.			
c Adjusted net income (if negative, enter -0-)			20,765.		

3P

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	165.	534.	534.
	2 Savings and temporary cash investments	141,666.	6,607.	6,607.
	3 Accounts receivable			
	Less allowance for doubtful accounts			
	4 Pledges receivable			
	Less allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7 Other notes and loans receivable (attach sch)			
	Less allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments — U S and state government obligations (attach schedule)			
	b Investments — corporate stock (attach schedule) Statement 4	719,557.	736,355.	810,424.
	c Investments — corporate bonds (attach schedule) Statement 5	55,681.	124,111.	159,700.
	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)				
16 Total assets (to be completed by all filers — see instructions. Also, see page 1, item I)	917,069.	867,607.	977,265.	
LIABILITIES	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
FUND ASSET BALANCES	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	917,069.	867,607.	
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
30 Total net assets or fund balances (see the instructions)	917,069.	867,607.		
31 Total liabilities and net assets/fund balances (see the instructions)	917,069.	867,607.		

Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year — Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	917,069.
2 Enter amount from Part I, line 27a	2	-49,462.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	867,607.
5 Decreases not included in line 2 (itemize)	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	867,607.

Part I Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a See Statement 6				
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			
b			
c			
d			
e			

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

2 Capital gain net income or (net capital loss)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>		2	-8,277.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 8, column (c) (see the instructions) If (loss), enter -0- in Part I, line 8 </div>		3	883.

Part II 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 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 (column (b) divided by column (c))
2008	43,500.	1,031,383.	0.042176
2007	50,000.	1,161,105.	0.043062
2006	50,000.	1,078,063.	0.046379
2005	50,000.	1,058,497.	0.047237
2004	51,300.	1,018,044.	0.050391
2 Total of line 1, column (d)			2 0.229245
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 0.045849
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 859,513.
5 Multiply line 4 by line 3			5 39,408.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 109.
7 Add lines 5 and 6			7 39,517.
8 Enter qualifying distributions from Part XII, line 4			8 51,100.

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.

Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 — see the instructions)

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary - see instr.)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	109.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0.
3 Add lines 1 and 2		3	109.
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	109.
6 Credits/Payments			
a 2009 estimated tax pmts and 2008 overpayment credited to 2009	6a	737.	
b Exempt foreign organizations — tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d	7	737.	
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	628.	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax 628. Refunded	11	0.	

Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (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 managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • 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?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XIV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) WA		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? <i>If 'No,' attach explanation</i>	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>		X

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Form 990-PF (2009)

Statements Regarding Activities Continued

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>RONALD STOCKDALE</u> Telephone no <u>253 572 8568</u> Located at <u>1019 PACIFIC AVE #916 TACOMA, WA</u> ZIP + 4 <u>98402</u>			
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 <u>15</u>		N/A	N/A

Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.**

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1b	N/A
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	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? If 'Yes,' list the years <u>20__ , 20__ , 20__ , 20__</u>	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
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 the instructions)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20__ , 20__ , 20__ , 20__</u>		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b If 'Yes,' did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)	3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

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Form 990-PF (2009)

Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to**(1)** Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?☐ Yes ☒ No**(2)** Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?☐ Yes ☒ No**(3)** Provide a grant to an individual for travel, study, or other similar purposes?☐ Yes ☒ No**(4)** Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)☐ Yes ☒ No**(5)** Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b N/A

Organizations relying on a current notice regarding disaster assistance check here

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

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

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

6b X

If 'Yes' to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b N/A

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 7		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1— see instructions). If none, enter 'NONE.'

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
None				

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

0

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

3 Five highest-paid independent contractors for professional services – (see 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 III Summary of Direct Charitable Activities

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

1	<u>N/A</u>	
2		
3		
4		

Part 123 Summary of Program-Related Investments (see instructions)

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

1	N/A	
2		
All other program-related investments See instructions		
3		
Total. Add lines 1 through 3		0.

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Part III Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				42,867.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			50,998.	
b Total for prior years 20____, 20____, 20____		0.		
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	0.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 51,100.				
a Applied to 2008, but not more than line 2a			50,998.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2009 distributable amount				102.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
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		0.		
d Subtract line 6c from line 6b Taxable amount — see instructions.		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				42,765.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
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				

N/A

4942(1)(5)

(4) Gross investment income

[illegible]

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

Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year See Statement 9				
Total			3a	51,100.
b Approved for future payment				
Total			3b	

Part 201-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1	Program service revenue					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	4,310.	
4	Dividends and interest from securities			14	15,572.	
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					-8,277.
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)				19,882.	-8,277.
13	Total. Add line 12, columns (b), (d), and (e)				13	11,605.

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

Part 218 Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]

TEEA0503L 07/06/09

2009

Federal Statements

Page 1

Client 2

THE STOCKDALE FAMILY FOUNDATION

91 1663715

6/06/10

12 30PM

Statement 1
Form 990-PF, Part I, Line 16b
Accounting Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
TAX PREPARATION	\$ 550.			
Total	\$ 550.	\$ 0.	\$ 0.	\$ 0.

Statement 2
Form 990-PF, Part I, Line 16c
Other Professional Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
INVESTMENT MANAGEMENT FEES	\$ 8,588.	\$ 8,588.		
Total	\$ 8,588.	\$ 8,588.	\$ 0.	\$ 0.

Statement 3
Form 990-PF, Part I, Line 18
Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
ANNUAL STATE REGISTRATION	\$ 45.			
FEDERAL INCOME TAX 2009	400.			
FOREIGN TAX WITHELD ON DIVIDENDS	384.	\$ 384.		
Total	\$ 829.	\$ 384.	\$ 0.	\$ 0.

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

Corporate Stocks	Valuation Method	Book Value	Fair Market Value
AUXIER COMMON STOCK PORTFOLIO SCH ATT	Cost	\$ 654,491.	\$ 740,798.
AUXIER PREFERRED STOCK SHEDULE ATTACHED	Cost	1,720.	9,130.
AUXIER FOREIGN STOCKS SCHEDULE ATTACHED	Cost	64,981.	60,496.
WELLS FARGO CARRIED NO COST- AUXIER SCH	Cost	15,163.	0.
Total		\$ 736,355.	\$ 810,424.

Client 2

THE STOCKDALE FAMILY FOUNDATION

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

<u>Corporate Bonds</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
AUXIER BOND PORTFOLIO SCHEDULE ATTACHED	Cost	\$ 124,111.	\$ 159,700.
	Total	\$ 124,111.	\$ 159,700.

Statement 6
Form 990-PF, Part IV, Line 1
Capital Gains and Losses for Tax on Investment Income

<u>Item</u>	<u>(a) Description</u>	<u>(b) How Acquired</u>	<u>(c) Date Acquired</u>	<u>(d) Date Sold</u>
1	100 QUEST DIAGNOSTICS INC	Purchased	4/20/2007	1/26/2009
2	50 QUEST DIAGNOSTICS INC	Purchased	4/20/2007	2/03/2009
3	50 QUEST DIAGNOSTICS INC	Purchased	4/20/2007	2/05/2009
4	50 QUEST DIAGNOSTICS INC	Purchased	4/20/2007	2/19/2009
5	400 CAREER EDUCATION CORP	Purchased	6/30/2006	2/25/2009
6	200 LINCOLN EDUCATIONAL	Purchased	9/23/2005	3/06/2009
7	10M MARSH & MCLENNAN 7.125% 6/15/09	Purchased	12/18/2008	6/15/2009
8	100 ANDERSONS INC	Purchased	12/11/2007	9/25/2009
9	100 ANDERSONS INC	Purchased	5/19/2008	9/25/2009
10	17 AIG INC	Purchased	12/15/2005	9/29/2009
11	109 SUNPOWER CORP	Purchased	9/29/2004	11/17/2009
12	202 WESTERN UNION	Purchased	4/25/2007	11/17/2009
13	100 NIKE INC CL B	Purchased	2/13/2006	12/14/2009
14	50 WELLPOINT INC	Purchased	11/24/2003	12/14/2009
15	1 AIG INC	Purchased	11/28/2008	12/16/2009
16	1000 ALLIANCE ONE INT'L	Purchased	9/03/2009	12/22/2009
17	50 QUEST DIAGNOSTICS INC	Purchased	4/20/2007	12/22/2009
18	400 FIRST SERVICE CORP	Purchased	3/20/2001	12/22/2009
19	200 FIRST SERVICE CORP	Purchased	3/24/2003	12/22/2009
20	50 WELLS FARGO BK 4.0% 08/15/08	Purchased	11/24/2003	12/22/2009

<u>Item</u>	<u>(e) Gross Sales</u>	<u>(f) Deprec. Allowed</u>	<u>(g) Cost Basis</u>	<u>(h) Gain (Loss)</u>	<u>(i) FMV 12/31/69</u>	<u>(j) Adj. Bas. 12/31/69</u>	<u>(k) Excess (i) - (j)</u>	<u>(l) Gain (Loss)</u>
1	5,032.		4,991.	41.				\$ 41.
2	2,504.		2,496.	8.				8.
3	2,522.		2,495.	27.				27.
4	2,541.		2,496.	45.				45.
5	10,391.		11,962.	-1,571.				-1,571.
6	3,091.		2,551.	540.				540.
7	10,000.		10,005.	-5.				-5.
8	3,602.		4,054.	-452.				-452.
9	3,602.		3,956.	-354.				-354.
10	762.		19,083.	-18,321.				-18,321.
11	2,137.		2,777.	-640.				-640.
12	3,975.		4,291.	-316.				-316.
13	6,392.		4,198.	2,194.				2,194.
14	2,868.		1,722.	1,146.				1,146.
15	20.		677.	-657.				-657.
16	4,805.		3,917.	888.				888.
17	3,076.		2,496.	580.				580.
18	7,446.		2,846.	4,600.				4,600.
19	3,723.		1,025.	2,698.				2,698.

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Statement 6 (continued)
Form 990-PF, Part IV, Line 1
Capital Gains and Losses for Tax on Investment Income

Item	(e) Gross Sales	(f) Deprec. Allowed	(g) Cost Basis	(h) Gain (Loss)	(i) FMV 12/31/69	(j) Adj. Bas. 12/31/69	(k) Excess (i) - (j)	(l) Gain (Loss)
20	2,993.		1,721.	1,272.				\$ 1,272.
							Total	\$ -8,277.

Statement 7
Form 990-PF, Part VIII, Line 1
List of Officers, Directors, Trustees, and Key Employees

Name and Address	Title and Average Hours Per Week Devoted	Compen- sation	Contri- bution to EBP & DC	Expense Account/ Other
RONALD A STOCKDALE 2720 SOUNDVIEW DR WEST TACOMA, WA 98466	President 12.00	\$ 0.	\$ 0.	\$ 0.
BRYAN R STOCKDALE 3120 TYEE UNIVERSITY PLACE, WA 98466	Director 1.00	0.	0.	0.
RUSSELL A STOCKDALE 14143 171ST AVE N E WOODINVILLE, WA 98072	Director 1.00	0.	0.	0.
PAUL R STOCKDALE 1045 RTOSEWOOD FIRCREST, WA 98766	Director 1.00	0.	0.	0.
CAROL A STOCKDALE 2720 SOUNDVIEW DR WEST TACOMA, WA 98466	SEC-TREA 5.00	0.	0.	0.
Total		\$ 0.	\$ 0.	\$ 0.

Statement 8
Form 990-PF, Part XV, Line 1a
Foundation Managers - 2% or More Contributors

RONALD A STOCKDALE
 CAROL A STOCKDALE

Client 2

THE STOCKDALE FAMILY FOUNDATION

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Statement 9
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
SAN FRANCISCO THEOL SEM. 2 KENSINGTON RD SAN ANSELMO, CA 94960	NONE	PUBLIC	GENERAL FUND	\$ 3,000.
J C SMITH THEOL SEMINARY 700 M L KING, JR DRIVE S W ATLANTA, GA 30314	NONE	PUBLIC	GENERAL FUND	5,000.
GRADUATE THEOLOGICAL UN 2400 RIDGE ROAD BERKELEY, CA 94709	NONE	PUBLIC	GENERAL FUND	500.
R M PALMER MINORITY SCHOL P O BOX 7119 TACOMA, WA 98406	NONE	PUBLIC	SCHOLARSHIPS	5,000.
BOYS & GIRLS CLUB 705 FRONTAGE ROAD SUITE B KENAI, AK 99611	NONE	PUBLIC	GENERAL FUND	600.
UNIV OF DUBUQUE 2000 UNIVERSITY AVE DUBUQUE, IA 52001	NONE	PUBLIC	GENERAL FUND & ENDOWMENT	20,000.
NORTHWEST BEHAVIORIAL ASSOC 12506 128TH LANE KIRKLAND, WA 98034	NONE	PUBLIC	GENERAL FUND	1,000.
UNIV OF WASHINGTON-AUTISM CTR CHDD P O BOX 357920 SEATTLE, WA 98195	NONE	PUBLIC	GENERAL FUND	2,000.
LIFT UP AFRICA P O BOX 301206 PORTLAND, OR 97294	NONE	PUBLIC	GENERAL PUBLIC	4,000.
COUSTRUTORES PARA CRISTO P O BOX 661406 BIRMINGHAM, AL 35266	NONE	PUBLIC	GENERAL PUBLIC	1,500.
SEATTLE CHILDRENS AUTISM CENTER P O BOX 5371 SEATTLE, WA 98145	NONE	PUBLIC	GENERAL PUBLIC	2,000.
BIBLE STUDY FELLOWSHIP, BSF INT'L LLC 19001 HUEBNER ROAD SAN ANTONIO, TX 78258	NONE	PUBLIC	GENERAL PUBLIC	1,500.

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Federal Statements

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THE STOCKDALE FAMILY FOUNDATION

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Statement 9 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
WORLD VISION P O BOX 70266 TACOMA, WA 98471	NONE	PUBLIC	GENERAL PUBLIC	\$ 5,000.

Total \$ 51,100.

Auxier Asset Management, LLC
PORTFOLIO APPRAISAL
The Stockdale Family Foundation
Custodian: Charles Schwab
A/C # 8524-5330
December 31, 2009

Quantity	Security	Unit Cost	Total Cost	Price	Market Value	Pct. Assets	Unit Income	Annual Income	Cur. Yield
COMMON STOCK									
300 000	AGCO Corp	16.81	5,042.98	32.34	9,702.00	0.9	0.000	0.00	0.0
500 000	Alkermes Inc	9.83	4,913.35	9.41	4,705.00	0.5	0.000	0.00	0.0
17 000	American International Group	40.51	688.69	29.98	509.66	0.0	0.000	0.00	0.0
300 000	Andersons Inc	12.69	3,807.70	25.82	7,746.00	0.8	0.350	105.00	1.4
250 000	Automatic Data Processing	33.78	8,445.30	42.82	10,705.00	1.0	1.360	340.00	3.2
400 000	Bank of New York Mellon Corp	26.64	10,656.89	27.97	11,188.00	1.1	0.360	144.00	1.3
300 000	Boeing Company	57.47	17,241.74	54.13	16,239.00	1.6	1.680	504.00	3.1
300 000	Boston Scientific Corp	14.88	4,464.95	9.00	2,700.00	0.3	0.000	0.00	0.0
200 000	Bridgepoint Education Inc	15.77	3,153.23	15.02	3,004.00	0.3	0.000	0.00	0.0
400 000	CVS Caremark Corp	18.86	7,545.00	32.21	12,884.00	1.3	0.300	120.00	0.9
300 000	Career Education Corp	22.80	6,840.56	23.31	6,993.00	0.7	0.000	0.00	0.0
1,200 000	City Bank of Lynwood	16.70	20,045.95	1.74	2,088.00	0.2	0.240	288.00	13.8
350 000	Coca-Cola Company	43.12	15,092.85	57.00	19,950.00	2.0	1.640	574.00	2.9
300,000	Columbia Sportswear Co	31.85	9,554.41	39.04	11,712.00	1.1	0.720	216.00	1.8
200 000	ConocoPhillips	36.04	7,208.95	51.07	10,214.00	1.0	2.000	400.00	3.9
600 000	Costco Wholesale Corp	31.07	18,639.97	59.17	35,502.00	3.5	0.720	432.00	1.2
348,000	Coventry Health Care Inc	37.67	13,108.00	24.29	8,452.92	0.8	0.000	0.00	0.0
400,000	Cypress Semiconductor	1.93	770.39	10.56	4,224.00	0.4	0.000	0.00	0.0
800 000	Dell Corp	27.91	22,330.31	14.36	11,488.00	1.1	0.000	0.00	0.0
1,000 000	Dt Pepper Snapple Group	22.56	22,564.31	28.30	28,300.00	2.8	0.600	600.00	2.1
350 000	E I Du Pont De Nemours	37.15	13,001.38	33.67	11,784.50	1.2	1.640	574.00	4.9
1,600 000	FirstService Corporation	5.18	8,280.91	19.12	30,592.00	3.0	0.000	0.00	0.0
500 000	Franklin Resources Inc.	37.59	18,795.87	105.35	52,675.00	5.1	0.840	420.00	0.8
250 000	Glaxo SmithKline PLC	48.03	12,007.19	42.25	10,562.50	1.0	1.960	490.00	4.6
300 000	Granite Construction Inc	28.23	8,468.95	33.66	10,098.00	1.0	0.520	156.00	1.5

Auxier Asset Management, LLC
PORTFOLIO APPRAISAL
The Stockdale Family Foundation
Custodian: Charles Schwab
A/C # 8524-5330
December 31, 2009

Quantity	Security	Unit Cost	Total Cost	Price	Market Value	Pct. Assets	Unit Income	Annual Income	Cur. Yield
700 000	Health Mgmt Assoc	6 92	4,843 38	7 27	5,089 00	0 5	0 000	0 00	0 0
125 000	Hewlett Packard	32 43	4,054 06	51 51	6,438 75	0 6	0 320	40 00	0 6
400 000	Home Depot Inc	36 37	14,549 95	28 93	11,572 00	1 1	0 900	360 00	3 1
300 000	Ingersoll Rand Co	36 85	11,055 65	35 74	10,722 00	1 0	0 280	84 00	0 8
600 000	Kroger Co.	21 08	12,647 27	20 53	12,318 00	1 2	0 380	228 00	1 9
220 000	Lincoln Educational	12 76	2,806 46	21 66	4,765 20	0 5	0 000	0 00	0 0
400 000	Lowes Companies	31 51	12,605 47	23 39	9,356 00	0 9	0 360	144 00	1 5
300 000	Manpower Inc	46 99	14,095 55	54 58	16,374 00	1 6	1 480	444 00	2 7
900 000	Marsh & McLennan Co	28 84	25,957 15	22 08	19,872 00	1 9	0 800	720 00	3 6
400 000	Merck & Co. Inc. New	55 58	22,233 66	36 54	14,616 00	1 4	1 520	608 00	4 2
300 000	Microsoft Corp	28 61	8,583 14	30 48	9,144 00	0 9	0 520	156 00	1 7
200 000	Nike Inc Class B	41 98	8,396 63	66 07	13,214 00	1 3	1 080	216 00	1 6
400 000	Paychex Inc	24 46	9,784 47	30 64	12,256 00	1 2	1 240	496 00	4 0
400 000	Pfizer Inc	26 64	10,654 15	18 19	7,276 00	0 7	0 640	256 00	3 5
100 000	Plum Creek Timber Company	23 25	2,325 45	37 76	3,776 00	0 4	1 680	168 00	4 4
300 000	Precision Castparts Corp	81 52	24,454 87	110 35	33,105 00	3 2	0 120	36 00	0 1
1,800 000	TCF Financial Corp	20 80	37,446 00	13 62	24,516 00	2 4	0 200	360 00	1 5
580 000	The Travelers Companies Inc	39 05	22,646 24	49 86	28,918 80	2 8	1 320	765 60	2 6
300 000	Unilever NV New York Shs	23 81	7,141 80	32 33	9,699 00	0 9	0 790	237 00	2 4
500 000	Unitedhealth Group Inc	40 31	20,156 48	30 48	15,240 00	1 5	0 120	60 00	0 4
1,200 000	Universal Technical Institute	24 47	29,361 90	20 20	24,240 00	2 4	0 000	0 00	0 0
650 000	Unum Group	13 11	8,518 39	19 52	12,688 00	1 2	0 330	214 50	1 7
600 000	Valero Energy Corp	32 39	19,431 47	16 75	10,050 00	1 0	0 600	360 00	3 6
300 000	Value Line Inc	24 70	7,411 00	25 10	7,530 00	0 7	0 800	240 00	3 2
500 000	Wellpoint Inc	34 80	17,399 58	58 29	29,145 00	2 8	0 000	0 00	0 0
500 000	Wells Fargo & Co	0 00	0 00	26 99	13,495 00	1 3	0 200	100 00	0 7
700 000	Willbros Group, Inc	6 23	4,361 00	16 87	11,809 00	1 2	0 000	0 00	0 0
500 000	Zimmer Holdings	57 80	28,899 94	59 11	29,555 00	2 9	0 000	0 00	0 0
			654,490 96		740,798 33	72 4		11,656 10	1 6

Auxier Asset Management, LLC
PORTFOLIO APPRAISAL
The Stockdale Family Foundation
Custodian: Charles Schwab
A/C # 8524-5330
December 31, 2009

Quantity	Security	Unit Cost	Total Cost	Price	Market Value	Pct. Assets	Unit Income	Annual Income	Cur. Yield
PREFERRED STOCK									
440	FusService Corp 7% Cumul Pfd	3 91	1,719 88	20 75	9,130 00	0 9	1 750	770 00	8 4
			1,719 88		9,130 00	0 9		770 00	8 4
FOREIGN EQUITIES									
100 000	PetroChina Company Limited ADR	138 99	13,898 95	118 96	11,896 00	1.2	1 817	181.70	1 5
800 000	SK Telecom ADR	20 01	16,009 95	16 26	13,008 00	1 3	0 350	280 00	2 2
500 000	Telenor Leslie Participaes ADR	17 20	8,600 01	21 42	10,710 00	1.0	1 175	587 50	5 5
1,200 000	Tesco PLC ADR	22 06	26,472 26	20 73	24,881 52	2 4	0 370	444 00	1 8
			64,981 17		60,495.52	5.9		1,493 20	2 5
CORPORATE BONDS									
10,000	Safeway Inc 4 950% Due 08-16-10	102 20	10,220 00	102 56	10,255 87	1 0	4 950	495.00	4 8
10,000	Williams Company 7 125% Due 09-01-11	100 95	10,095 00	106 30	10,630 20	1 0	7 125	712 50	6.7
10,000	Tyson Foods Inc 8 250% Due 10-01-11	102 45	10,245 00	107 00	10,700 00	1 0	8 250	825 00	7 7
10,000	Hartford Financial Services 5 250% Due 10-15-11	86 95	8,695 00	103 14	10,313.91	1 0	5 250	525 00	5 1
10,000	Weyerhaeuser Co 6 750% Due 03-15-12	99 32	9,932 50	107 00	10,700 00	1 0	6 750	675 00	6.3
10,000	AOL Time Warner Inc 6 875% Due 05-01-12	93 38	9,338 24	109 49	10,949 27	1 1	6.875	687 50	6 3
10,000	Waste Management 6 375% Due 11-15-12	95 24	9,524.16	110 13	11,013 49	1 1	6 375	637 50	5 8
10,000	Church Dwight Co 6 000% Due 12-15-12	100 45	10,045 00	101 50	10,150 00	1 0	6.000	600 00	5 9
10,000	Dr Pepper Snapple 6 120% Due 05-01-13	99 03	9,902.75	109 44	10,943 83	1 1	6.120	612 00	5.6

Auxier Asset Management, LLC
PORTFOLIO APPRAISAL
The Stockdale Family Foundation
Custodian: Charles Schwab
A/C # 8524-5330
December 31, 2009

Quantity	Security	Unit Cost	Total Cost	Price	Market Value	Pct. Assets	Unit Income	Annual Income	Cur. Yield
10,000	Wellpoint Inc 5 250% Due 01-15-16	93.00	9,300.00	100.91	10,090.79	1.0	5.250	525.00	5.2
10,000	Dow Chemical 5 700% Due 05-15-18	93.95	9,395.00	102.17	10,217.17	1.0	5.700	570.00	5.6
50,000	Ontario Hydro CTF 0 000% Due 11-27-20	21.54	10,771.82	55.77	27,885.25	2.7	0.000	0.00	0.0
30,000	Ontario Hydro Generic Resid 0 000% Due 10-15-21	22.16	6,647.00	52.83	15,849.75	1.5	0.000	0.00	0.0
			124,111.47		159,699.53	15.6		6,864.50	4.3

**Application for Extension of Time To File an
Exempt Organization Return**

OMB No 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension — check this box and complete Part I only ☐*All other corporations (including 1120-C filers), partnerships, REMICS, and trusts must use Form 7004 to request an extension of time to file income tax returns*

Electronic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*

Type or print	Name of Exempt Organization THE STOCKDALE FAMILY FOUNDATION	Employer identification number 91 1663715
File by the due date for filing your return. See instructions	Number, street, and room or suite number. If a P.O. box, see instructions. 1019 PACIFIC AVE #916	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. TACOMA, WA 98402	

Check type of return to be filed (file a separate application for each return)

- | | | |
|---|--|------------------------------------|
| <input type="checkbox"/> Form 990 | <input type="checkbox"/> Form 990-T (corporation) | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL | <input type="checkbox"/> Form 990-T (section 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ | <input type="checkbox"/> Form 990-T (trust other than above) | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A | <input type="checkbox"/> Form 8870 |

- The books are in the care of ► RONALD STOCKDALE

Telephone No ► 253 572 8568

FAX No ► _____

- 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 is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover.

- 1** I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 8/15, 20 10, to file the exempt organization return for the organization named above.
The extension is for the organization's return for

- ☒ calendar year 20 09 or
- ☐ tax year beginning _____, 20 _____, and ending _____, 20 _____

- 2** If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a 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.	3a	\$ <u>0.</u>
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$ <u>737.</u>
c Balance Due. Subtract line 3b from line 3a. 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.	3c	\$ <u>0.</u>

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions**BAA For Privacy Act and Paperwork Reduction Act Notice, see instructions.**Form **8868** (Rev 4-2009)