



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



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

OMB No 1545-0052

**2009**Department of the Treasury  
Internal Revenue Service

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

**For calendar year 2009, or tax year beginning , 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.	Kahle/Austin Foundation 513B Simonds Loop San Francisco, CA 94129	<b>A</b> Employer identification number 91-1816164
		<b>B</b> Telephone number (see the instructions) (415) 931-8796
<b>H</b> 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		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, column (c), line 16) \$ 36,587,999.		<b>D</b> 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
<b>J</b> Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

**Part I Analysis of Revenue and Expenses**

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions).)

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>REVENUE</b>				
1 Contributions, gifts, grants, etc., received (att sch)				
2 <input checked="" type="checkbox"/> If the foundn is not req to att Sch B				
3 Interest on savings and temporary cash investments	694,414.	694,414.	N/A	
4 Dividends and interest from securities	410,121.	410,121.		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain/(loss) from sale of assets not on line 10	-2,245,583.			
b Gross sales price for all assets on line 6a	20,415,978.			
7 Capital gain net income (from Part IV, line 2)		0.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit/(loss) (att sch)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	* -1,141,048.	1,104,535.		
<b>ADMINISTRATIVE AND EXPENSES</b>				
13 Compensation of officers, directors, trustees, etc	0.			
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule) See St 1	276.			276.
b Accounting fees (attach sch) See St 2	14,609.			14,609.
c Other prof fees (attach sch) See St 3	171,781.	171,781.		
17 Interest				
18 Taxes (attach schedule)(see instr) See Stm 4	62,280.	7,045.		235.
19 Depreciation (attach sch) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule) See Statement 5	45.			45.
24 Total operating and administrative expenses. Add lines 13 through 23	248,991.	178,826.		15,165.
25 Contributions, gifts, grants paid Part XV	3,185,522.			3,361,484.
26 Total expenses and disbursements. Add lines 24 and 25	** 3,434,513.	178,826.		3,376,649.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-4,575,561.			
b Net investment income (if negative, enter -0 )		925,709.		
c Adjusted net income (if negative, enter -0-)				

BAA For Privacy Act and Paperwork Reduction Act Notice, see the instructions.

TEEA0504L 02/02/10

Form 990-PF (2009)

\*See statement 16

\*\*See statement 17

SCANNED NOV 19 2010

G14

18

**Part II Balance Sheets**

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>A S S E T S</b>	1 Cash — non-interest-bearing	432,949.	96,376.	96,376.
	2 Savings and temporary cash investments	3,713,239.	49,628.	49,628.
	3 Accounts receivable <span>▶</span>			
	Less allowance for doubtful accounts <span>▶</span>			
	4 Pledges receivable <span>▶</span>			
	Less allowance for doubtful accounts <span>▶</span>			
	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) <span>▶</span>			
	Less allowance for doubtful accounts <span>▶</span>			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	82,909.	74,000.	74,000.
	10a Investments — U.S. and state government obligations (attach schedule) <b>Statement 6</b>	7,569,530.	3,119,788.	3,119,788.
	b Investments — corporate stock (attach schedule) <b>Statement 7</b>	12,506,335.	9,072,518.	9,072,518.
	c Investments — corporate bonds (attach schedule) <b>Statement 8</b>	4,150,120.	6,501,690.	6,501,690.
<b>L I A B I L I T I E S</b>	11 Investments — land, buildings, and equipment, basis <span>▶</span>			
	Less accumulated depreciation (attach schedule) <span>▶</span>			
	12 Investments — mortgage loans			
	13 Investments — other (attach schedule) <b>Statement 9</b>	7,893,636.	17,665,665.	17,665,665.
	14 Land, buildings, and equipment basis <span>▶</span>			
	Less accumulated depreciation (attach schedule) <span>▶</span>			
	15 Other assets (describe <span>▶</span> <u>See Statement 10</u> )	8,334.	8,334.	8,334.
	16 <b>Total assets</b> (to be completed by all filers — see instructions. Also, see page 1, item I)	36,357,052.	36,587,999.	36,587,999.
<b>N E T A S S E T S  O R  F U N D B A L A N C E S</b>	17 Accounts payable and accrued expenses	12,817.		
	18 Grants payable	267,508.	91,546.	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe <span>▶</span> <u>See Statement 11</u> )		46,000.	
	23 <b>Total liabilities</b> (add lines 17 through 22)	280,325.	137,546.	
<b>F U N D B A L A N C E S</b>	<b>Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.</b> <input checked="" type="checkbox"/>			
	24 Unrestricted	36,076,727.	36,450,453.	
	25 Temporarily restricted			
	26 Permanently restricted			
	<b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.</b> <input type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 <b>Total net assets or fund balances</b> (see the instructions)	36,076,727.	36,450,453.	
<b>N E T A S S E T S  O R  F U N D B A L A N C E S</b>	31 <b>Total liabilities and net assets/fund balances</b> (see the instructions)	36,357,052.	36,587,999.	

**Part III Analysis of Changes in Net Assets or Fund Balances**

1 Total net assets or fund balances at beginning of year — Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	36,076,727.
2 Enter amount from Part I, line 27a	2	-4,575,561.
3 Other increases not included in line 2 (itemize) <span>▶</span> <u>See Statement 12</u>	3	4,958,987.
4 Add lines 1, 2, and 3	4	36,460,153.
5 Decreases not included in line 2 (itemize) <span>▶</span> <u>See Statement 13</u>	5	9,700.
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	36,450,453.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shares MLC Company)

(b) How acquired  
P — Purchase  
D — Donation(c) Date acquired  
(month, day, year)(d) Date sold  
(month, day, year)**1a Sale of Publicly Traded Securities**

P

Various

Various

<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

(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)
<b>a</b> 20,415,978.		22,661,561.	-2,245,583.
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
<b>a</b>			-2,245,583.
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

**2** Capital gain net income or (net capital loss).If gain, also enter in Part I, line 7  
If (loss), enter -0- in Part I, line 7

2

-2,245,583.

**3** Net short-term capital gain or (loss) as defined in sections 1222(5) and (6).If gain, also enter in Part I, line 8, column (c) (see the instructions). If (loss), enter -0-  
in Part I, line 8

3

0.

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes☒ No

If 'Yes,' the foundation does not qualify under section 4940(e). Do not complete this part

**1** Enter the appropriate amount in each column for each year, see 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	3,217,345.	40,814,625.	0.078828
2007	2,154,204.	44,795,135.	0.048090
2006	4,322,835.	43,513,475.	0.099345
2005	2,641,255.	43,590,669.	0.060592
2004	3,681,082.	44,358,183.	0.082985

**2** Total of line 1, column (d)

2

0.369840

**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

0.073968

**4** Enter the net value of noncharitable-use assets for 2009 from Part X, line 5

4

37,914,203.

**5** Multiply line 4 by line 3

5

2,804,438.

**6** Enter 1% of net investment income (1% of Part I, line 27b)

6

9,257.

**7** Add lines 5 and 6

7

2,813,695.

**8** Enter qualifying distributions from Part XII, line 4

8

3,376,649.

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.

**Part VI 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.)		1	9,257.
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			
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	9,257.
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	9,257.
6 Credits/Payments.			
a 2009 estimated tax pmts and 2008 overpayment credited to 2009	6a	92,589.	
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	92,589.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" 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	83,332.	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax	11	0.	
			83,332.   Refunded

**Part VII-A 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 XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) CA 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 General Instruction G? <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

BAA

Form 990-PF (2009)

**Part VII-A Statements Regarding Activities Continued**

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see 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>Barbara Blakely</u> Telephone no <u>(415) 931-8796</u> Located at <u>513B Simonds Loop San Francisco, CA</u> ZIP + 4 <u>94129</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

**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
<b>1a</b> 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 checked="" type="checkbox"/> Yes <input 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>b</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	X
<b>c</b> 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
<b>2</b> 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)).		
<b>a</b> At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years <u>20__ , 20__ , 20__ , 20__</u>		
<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> 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
<b>c</b> 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>		
<b>3a</b> 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>b</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
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
<b>b</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

BAA

Form 990-PF (2009)

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required** (continued)

5a During the year did the foundation pay or incur any amount to:

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

X

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?

☒ Yes ☐ No

If 'Yes,' attach the statement required by Regulations section 53.4945-5(d). See Statement 14

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

6b

X

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

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

7b

N/A

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

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

1 List all officers, directors, trustees, foundation managers and their compensation (see 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
Brewster L. Kahle 513B Simonds Loop San Francisco, CA 94129	Pres & Tres 2.00	0.	0.	0.
Mary K. Austin 513B Simonds Loop San Francisco, CA 94129	VP & Sec 2.00	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

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services — (see instructions). If none, enter 'NONE.'

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
Morgan Stanley Private Wealth Management 2725 Sand Hill Road, Suite 100 Menlo Park, CA 94025	Investment Mgmt	171,781.
Total number of others receiving over \$50,000 for professional services		0

**Part IX-A** Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

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

BAA

Form 990-PF (2009)



**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
a Average monthly fair market value of securities	1a	32,341,928.
b Average of monthly cash balances	1b	1,543,358.
c Fair market value of all other assets (see instructions)	1c	4,606,291.
d Total (add lines 1a, b, and c)	1d	38,491,577.
e 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	38,491,577.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	577,374.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	37,914,203.
6 Minimum investment return. Enter 5% of line 5	6	1,895,710.

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1 Minimum investment return from Part X, line 6		1	1,895,710.
2a Tax on investment income for 2009 from Part VI, line 5	2a	9,257.	
b Income tax for 2009. (This does not include the tax from Part VI.)	2b		
c Add lines 2a and 2b		2c	9,257.
3 Distributable amount before adjustments. Subtract line 2c from line 1		3	1,886,453.
4 Recoveries of amounts treated as qualifying distributions		4	
5 Add lines 3 and 4		5	1,886,453.
6 Deduction from distributable amount (see instructions)		6	
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	1,886,453.

**Part 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	3,376,649.
b Program-related investments — total from Part IX-B	1b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the:		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	3,376,649.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	9,257.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	3,367,392.

**Note:** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				1,886,453.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years 20__, 20__, 20__		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004	1,505,609.			
b From 2005	487,626.			
c From 2006	2,199,669.			
d From 2007				
e From 2008	1,202,868.			
f Total of lines 3a through e	5,395,772.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 3,376,649.				
a Applied to 2008, but not more than line 2a			0.	
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				1,886,453.
e Remaining amount distributed out of corpus	1,490,196.			
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	6,885,968.			
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				0.
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)	1,505,609.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	5,380,359.			
10 Analysis of line 9				
a Excess from 2005	487,626.			
b Excess from 2006	2,199,669.			
c Excess from 2007				
d Excess from 2008	1,202,868.			
e Excess from 2009	1,490,196.			

N/A

- b**
- Check box to indicate whether the foundation is a private operating foundation described in section
- ☐
- 4942(j)(3) or
- ☐
- 4942(j)(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.

**Part XV** 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
<i>a</i> Paid during the year See Statement 16				
<b>Total</b>			<b>3a</b>	3,185,522.
<i>b</i> Approved for future payment Wellesley College 106 Central Street Wellesley, MA 02481	N/A	509 (a) (1)	General Support	91,545.
<b>Total</b>			<b>3b</b>	91,545.

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	
<b>1</b> Program service revenue					
<b>a</b> _____					
<b>b</b> _____					
<b>c</b> _____					
<b>d</b> _____					
<b>e</b> _____					
<b>f</b> _____					
<b>g</b> Fees and contracts from government agencies					
<b>2</b> Membership dues and assessments					
<b>3</b> Interest on savings and temporary cash investments			14	694,414.	
<b>4</b> Dividends and interest from securities			14	410,121.	
<b>5</b> Net rental income or (loss) from real estate					
<b>a</b> Debt-financed property					
<b>b</b> Not debt-financed property					
<b>6</b> Net rental income or (loss) from personal property					
<b>7</b> Other investment income					
<b>8</b> Gain or (loss) from sales of assets other than inventory			18	-2,245,583.	
<b>9</b> Net income or (loss) from special events					
<b>10</b> Gross profit or (loss) from sales of inventory					
<b>11</b> Other revenue					
<b>a</b> _____					
<b>b</b> _____					
<b>c</b> _____					
<b>d</b> _____					
<b>e</b> _____					
<b>12</b> Subtotal. Add columns (b), (d), and (e)				-1,141,048.	
<b>13</b> <b>Total.</b> Add line 12, columns (b), (d), and (e)				-1,141,048.	

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

[illegible]



Kahle/Austin Foundation

91-1816164

**Statement 1**  
**Form 990-PF, Part I, Line 16a**  
**Legal Fees**

	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Legal Fees	\$ 276.			\$ 276.
Total	<u>\$ 276.</u>	<u>\$ 0.</u>		<u>\$ 276.</u>

**Statement 2**  
**Form 990-PF, Part I, Line 16b**  
**Accounting Fees**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Accounting Fees	\$ 14,609.			\$ 14,609.
Total	<u>\$ 14,609.</u>	<u>\$ 0.</u>		<u>\$ 14,609.</u>

**Statement 3**  
**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	\$ 171,781.	\$ 171,781.		
Total	<u>\$ 171,781.</u>	<u>\$ 171,781.</u>		<u>\$ 0.</u>

**Statement 4**  
**Form 990-PF, Part I, Line 18**  
**Taxes**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
CA State Taxes	\$ 235.			\$ 235.
Deferred Tax Expense	46,000.			
Federal Excise Taxes	9,000.			
Foreign Taxes Withheld from Divs	7,045.	\$ 7,045.		
Total	<u>\$ 62,280.</u>	<u>\$ 7,045.</u>		<u>\$ 235.</u>

Kahle/Austin Foundation

91-1816164

**Statement 5**  
**Form 990-PF, Part I, Line 23**  
**Other Expenses**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Filing Fees	\$ 45.			\$ 45.
Total	\$ 45.	\$ 0.		\$ 45.

**Statement 6**  
**Form 990-PF, Part II, Line 10a**  
**Investments - U.S. and State Government Obligations**

U.S. Government Obligations	Valuation Method	Book Value	Fair Market Value
US Treasury Note 3.785%, 1,200,000 Sh.	Mkt Val	\$ 1,223,256.	\$ 1,223,256.
US Treasury Tips Note 3.0% 800,000 Sh.	Mkt Val	904,852.	904,852.
US Treasury Tips Note 1.875% 800,000 Sh.	Mkt Val	991,680.	991,680.
		\$ 3,119,788.	\$ 3,119,788.
Total		\$ 3,119,788.	\$ 3,119,788.

**Statement 7**  
**Form 990-PF, Part II, Line 10b**  
**Investments - Corporate Stocks**

Corporate Stocks	Valuation Method	Book Value	Fair Market Value
Chevron Corp., 6,325 Sh.	Mkt Val	\$ 486,962.	\$ 486,962.
Exxon Mobil, 5,813 Sh.	Mkt Val	396,388.	396,388.
JPMorgan Chase & Co., 13,700 sh	Mkt Val	570,879.	570,879.
Tetra Tech Inc, 11,200 Sh.	Mkt Val	304,304.	304,304.
Johnson & Johnson, 13,800 Sh	Mkt Val	888,858.	888,858.
India FD Inc, 22,460 Sh.	Mkt Val	628,122.	628,122.
Schlumberger Ltd USD, 7,575 Sh.	Mkt Val	491,707.	491,707.
Wal Mart Stores Inc, 11,500 Sh.	Mkt Val	614,675.	614,675.
Lorillard Inc, 12,000 Sh.	Mkt Val	962,760.	962,760.
Baxter Intl Inc, 12,500 Sh.	Mkt Val	733,500.	733,500.
Amgen Inc, 17,300 Sh.	Mkt Val	978,661.	978,661.
Bank New York Mellon Corp, 21,200 Sh.	Mkt Val	592,964.	592,964.
BHP Billiton Ltd ADR 6,200 Sh.	Mkt Val	456,506.	456,506.
Bank of America Corp, 47,000 Sh.	Mkt Val	707,820.	707,820.
Yahoo Inc, 15,400 Sh.	Mkt Val	258,412.	258,412.
Total		\$ 9,072,518.	\$ 9,072,518.



Kahle/Austin Foundation

91-1816164

**Statement 8**  
**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>
Abbott Labs Sr, 1,000,000 sh	Mkt Val	\$ 1,092,950.	\$ 1,092,950.
Pepsico, Inc 4.65%, 1,000,000 Sh.	Mkt Val	1,068,170.	1,068,170.
United Parcel Sr 4.5%, 1,000,000 Sh.	Mkt Val	1,063,200.	1,063,200.
Wal-Mart Stores 4.125%, 1,000,000 Sh.	Mkt Val	1,035,850.	1,035,850.
AT&T Inc SR Uns Global 4.85% 500,000 Sh.	Mkt Val	531,645.	531,645.
Coca-Cola Enterpr Inc 7.375% 500,000 Sh.	Mkt Val	579,800.	579,800.
Hewlett-Pack Co SR Gbl 6.125% 500,000 Sh	Mkt Val	558,695.	558,695.
IBM Corp SR Uns Global 6.5% 500,000 Sh.	Mkt Val	571,380.	571,380.
	Total	\$ 6,501,690.	\$ 6,501,690.

**Statement 9**  
**Form 990-PF, Part II, Line 13**  
**Investments - Other**

<u>Other Investments</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
Interest Receivable	Mkt Val	\$ 235,135.	\$ 235,135.
Accrued Interest	Mkt Val	4,725.	4,725.
Open Library of San Francisco	Mkt Val	4,601,624.	4,601,624.
Total Other Investments		\$ 4,841,484.	\$ 4,841,484.

Other Publicly Traded Securities

IShares Inc MSCI Japan, 75,000 sh	Mkt Val	730,500.	730,500.
IShares Inc Pacific Ex Japan, 18,000 sh	Mkt Val	744,660.	744,660.
IShares Inc TR S&P Euro, 14,000 sh	Mkt Val	545,440.	545,440.
IShares FTSE China, 18,700 sh	Mkt Val	790,262.	790,262.
IShares MSCI Emrging Mkts Ind, 26,800 Sh	Mkt Val	1,112,200.	1,112,200.
Currency Shares Euro Tr, 6,000 Sh.	Mkt Val	857,460.	857,460.
Ishr DJ Real Est US ETFS, 16,000 Sh.	Mkt Val	734,720.	734,720.
Total Other Publicly Traded Securities		\$ 5,515,242.	\$ 5,515,242.

Other Securities

Kirtas Technologies	Mkt Val	100,000.	100,000.
Bundesobligation 4.25%, 320,000 Sh.	Mkt Val	490,966.	490,966.
Bundesrepublik 5%, 1,105,000 Sh.	Mkt Val	1,675,598.	1,675,598.
Bundesschatz 4%, 700,000 Sh.	Mkt Val	1,026,100.	1,026,100.
IShares S&P GSCI Com Idx Tr 24,300 Sh.	Mkt Val	773,226.	773,226.
Norway Gvm't 6.5% 2,656,000 Sh.	Mkt Val	507,902.	507,902.
Norway Kingdom of Govt 6% 1,765,000 Sh.	Mkt Val	319,856.	319,856.
Switzerland Govt Bond 3.5% 500,000 Sh.	Mkt Val	492,762.	492,762.
Federal Farm Credit Bank 4.7% 500,000 Sh	Mkt Val	516,405.	516,405.
Fed Home Loan Banks, 3.510% 400,000 Sh.	Mkt Val	406,124.	406,124.
Pixel Qi	Mkt Val	1,000,000.	1,000,000.
Total Other Securities		\$ 7,308,939.	\$ 7,308,939.

Total \$ 17,665,665. \$ 17,665,665.

Kahle/Austin Foundation

91-1816164

**Statement 10**  
**Form 990-PF, Part II, Line 15**  
**Other Assets**

	<u>Book Value</u>	<u>Fair Market Value</u>
Program Related Investment - SFCFB	\$ 8,334.	\$ 8,334.
Total	<u>\$ 8,334.</u>	<u>\$ 8,334.</u>

**Statement 11**  
**Form 990-PF, Part II, Line 22**  
**Other Liabilities**

Deferred federal excise taxes	\$ 46,000.
Total	<u>\$ 46,000.</u>

**Statement 12**  
**Form 990-PF, Part III, Line 3**  
**Other Increases**

Unrealized gain on investments	\$ 4,958,987.
Total	<u>\$ 4,958,987.</u>

**Statement 13**  
**Form 990-PF, Part III, Line 5**  
**Other Decreases**

Net expenses, subsidiary	\$ 9,700.
Total	<u>\$ 9,700.</u>

**Statement 14**  
**Form 990-PF, Part VII-B, Line 5c**  
**Expenditure Responsibility**

Grantee Name:	Internet Archive
Address:	300 Funston Avenue
Address:	San Francisco, CA 94118-2116
Grant Date:	Various
Grant Amount:	\$ 2649700
Grant Purpose:	The grant shall be used for general support.
Amt. Expended by Grantee:	\$ 2649700
Any Diversion by Grantee:	No
Dates of Reports by Grantee:	Annual
Date of Verification:	
Results of Verification:	Internet Archive submits reports annually regarding its expenditures pursuant to the grant.
	To the knowledge of the grantor, no funds have been diverted to any activity other than the activity for which the grant was originally made.

Kahle/Austin Foundation

91-1816164

**Statement 14 (continued)**  
**Form 990-PF, Part VII-B, Line 5c**  
**Expenditure Responsibility**

The Grantor has no reason to doubt the accuracy or reliability of the report from the grantee; therefore, no independent verification of the report has been made.

**Statement 15**  
**Form 990-PF, Part XV, Line 1a**  
**Foundation Managers - 2% or More Contributors**

Brewster L. Kahle  
 Mary K. Austin

**Statement 16**  
**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>
Internet Archive PO Box 29244 San Francisco, CA 94129	N/A	4942 j	General Support	\$ 2,649,700.
SF Center for the Book 300 De Haro Street #334 San Francisco, CA 94103	N/A	509(a)2	General Support	288,000.
Oxbow School 530 Third Street Napa, CA 94559	N/A	509(a)1	General Support	1,000.
Minnesota Ctr for the Bk Arts 1011 Washington Ave S #100 Minneapolis, MN 55415	N/A	509(a)(1)	General support	2,000.
ACLU Foundation 1663 Mission Street, Ste 460 San Francisco, CA 94103	N/A	509(a)1	General support	1,000.
Oberlin College Office of Dev. 50 W Lorain Street Oberlin, OH 44074	N/A	509(a)1	General support	1,000.

**Statement 16 (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>
KQED 2601 Mariposa Street San Francisco, CA 94110	N/A	509(a)1	General support	\$ 1,000.
KPFA 1929 ML King Jr Way Berkeley, CA 94704	N/A	509(a)2	General support	1,000.
The Long Now Foundation PO Box 29462 San Francisco, CA 94129	N/A	509(a)	General Support	500.
Kala Art Institute 1060 Heinz Avenue Berkeley, CA 94710	N/A	509(a)1	General Support	5,000.
The MIT Alumni Fund 77 Massachusetts Ave, W92-280 Cambridge, MA 02139	N/A	509(a)1	General Support	1,000.
Project Gutenberg 809 North 1500 West Salt Lake City, UT 84116	N/A	509(a)1	General Support	10,000.
Free Software Foundation 59 Temple Place, Suite 330 Boston, MA 02111	N/A	509(a)2	General Support	1,000.
Bread & Puppet Theatre RR2 Glover, VT 05839	N/A	509(a)2	General Support	20,000.
Creative Commons Corporation 543 Howard Street, 5th Floor San Francisco, CA 94105	N/A	509(a)1	General Support	1,000.
Center for Art In Translation 35 Stilman Street, Suite 201 San Francisco, CA 94107	N/A	509(a)1	General Support	1,000.
San Francisco Foundation 225 Bush Street, Suite 500 San Francisco, CA 94104	N/A	509(a)1	General Support	151,569.

Kahle/Austin Foundation

91-1816164

**Statement 16 (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>
Guidestar 4801 Courthouse St., Ste 220 Williamsburg, VA 23188	N/A	509(a)1	General Support	\$ 1,000.
The Codex Foundation 2203 Fourth Street Berkeley, CA 94710	N/A	509(a)2	General Support	1,000.
Beat Within 275 Ninth Street San Francisco, CA 94103	N/A	509(a)1	General Support	1,000.
Benetech 480 S California Avenue, Ste 201 Palo Alto, CA 94306	N/A	509(a)	General Support	500.
Exploratorium 3601 Lyon Street San Francisco, CA 94123	N/A	509(a)1	General Support	1,000.
Paul Dresher Ensemble Musical Traditions 333 Valencia Street, Ste 301 San Francisco, CA 94103	N/A	509(a)2	General Support	1,000.
The California Academy of Sciences 55 Music Concourse Drive San Francisco, CA 94118	N/A	509(a)1	General Support	500.
826 Valencia 826 Valencia San Francisco, CA 94110	N/A	509(a)1	General Support	500.
Wellesley College 106 Central Street Wellesley, MA 02481	N/A	509(a)1	General Support	9,753.
American Academy of Arts & Sciences 136 Irving Street Cambridge, MA 02138	N/A	509(a)1	General Support	1,000.
Boston Public Library 700 Boylston Street Boston, MA 02116	N/A	509(a)1	General Support	500.

Kahle/Austin Foundation

91-1816164

Statement 16 (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>
Democracy Now 87 Lafayette St Floor M New York, NY 10013	N/A	509(a)1	General Support	\$ 10,000.
UC Berkeley Law - Samuelson Clinic 2080 Addison Street Berkeley, CA 94720	N/A	509(a)1	Samuelson Law, Technology & Public Policy Clinic	10,000.
Scarsdale Alumni Association 470 Nepperhan Ave. Suite 308 Yonkers, NY 10701	N/A	509a1	General Suppport	1,000.
Cathedral School for Boys 1275 Sacramento Street San Francisco, CA 94109	N/A	509(a)	General Support	5,000.
Ecology Action 5798 Ridgewood Road Willits , CA 95490	N/A	509(a)1	General Support	1,000.
Urban School of San Francisco 1563 Page Street San Francisco, CA 94117	N/A	509(a)	General Support	5,000.

Total \$ 3,185,522.

Statement 16  
Form 990-PF  
Supplemental Information

Reconciliation of Revenue per Audited Financial Statements with Revenue Reported on Form 990-PF, Return of Private Foundation	
Total revenue per audited financial statements	\$ 3,637,111
Amounts included in the audited financial statements but not included in line 12, column (a), Form 990-PF:	7,045
Investment Management Fee	171,781
Net unrealized gains on investments	(4,956,985)
Total revenue per line 12, column (a), Form 990-PF	\$ (1,141,048)

Reconciliation of Expenses per Audited Financial Statements with Expenses Reported on Form 990-PF, Return of Private Foundation	
Total expenses per audited financial statements	\$ 3,263,387
Amounts not included in the audited financials statements but included in line 26, column (a), Form 990-PF:	(655)
Investment management fees netted against investment income	171,781
Total expenses per line 26, column (a), Form 990-PF	\$ 3,434,513

2009

**Federal Statements  
Kahle/Austin Foundation**

91-1816164

**Statement 17****Form 990-PF, Part I, Line 25, Column D**

<b>Reconciliation of Grants per Books to Grants per Disbursements for Charitable Purposes</b>	
Grants reported on Form 990-PF, Line 25, Column A	\$ 3,185,522
Grants payable, beginning of year	267,508
Grants payable, end of year	(91,546)
Grants Reported on Form 990-PF, Line 25, Column D	\$ 3,361,484



**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](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*.

<b>Type or print</b>  File by the due date for filing your return. See instructions.	Name of Exempt Organization	Employer identification number
	Kahle/Austin Foundation	91-1816164
	Number, street, and room or suite number. If a P.O. box, see instructions.	
	513B Simonds Loop	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	San Francisco, CA 94129	

**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 ► Barbara Blakely

Telephone No. ► (415) 931-8796 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 \$	92,589.
3b 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 \$	92,589.
3c <b>Balance Due.</b> 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 \$	0.

**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)

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

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1)

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

<b>Type or print</b>  File by the extended due date for filing the return. See instructions	Name of Exempt Organization	Employer identification number
	Kahle/Austin Foundation	91-1816164
	Number, street, and room or suite number. If a P O box, see instructions	For IRS use only
	Fontanello, Duffield & Otake, LLP 44 Montgomery Street, Suite 2019	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	San Francisco, CA 94104	

**Check type of return to be filed** (File a separate application for each return).

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

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

- The books are in care of Barbara Blakely  
Telephone No (415) 931-8796 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 is for.

- I request an additional 3-month extension of time until 11/15, 2010
- For calendar year 2009, or other tax year beginning \_\_\_\_\_, 20\_\_\_\_, and ending \_\_\_\_\_, 20\_\_\_\_.
- If this tax year is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period
- State in detail why you need the extension The Foundation requires additional time to gather the information necessary to file a complete and accurate return.

<b>8a</b> 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	<b>8a</b> \$	9,257.
<b>b</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	<b>8b</b> \$	92,589.
<b>c Balance Due.</b> 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 instrs	<b>8c</b> \$	0.

**Signature and Verification**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature \_\_\_\_\_ Title \_\_\_\_\_ Date \_\_\_\_\_