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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 , 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.	Name of foundation ROBERTSON FAMILY FOUNDATION		A Employer identification number 91-1816672
	Number and street (or P O box number if mail is not delivered to street address) 14301 FNB PARKWAY	Room/suite 115	B Telephone number (402) 496-7200
	City or town, state, and ZIP code OMAHA, NE 68154		C If exemption application is pending, check here ☐
	H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 1,323,813. (Part I, column (d) must be on cash basis.)		J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received	165,000.		N/A	
2	Check ☐ if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	22.	22.		STATEMENT 2
4	Dividends and interest from securities	63,186.	63,186.		STATEMENT 3
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	95,256.			STATEMENT 1
b	Gross sales price for all assets on line 6a	343,349.			
7	Capital gain net income (from Part IV, line 2)		343,349.		
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 or (loss)				
11	Other income				
12	Total. Add lines 1 through 11	323,464.	406,557.		
13	Compensation of officers, directors, trustees, etc	0.	0.		0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees				
b	Accounting fees STMT 4	1,500.	225.		1,275.
c	Other professional fees STMT 5	429.	69.		360.
17	Interest				
18	Taxes STMT 6	4,708.	0.		0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses				
24	Total operating and administrative expenses. Add lines 13 through 23	6,637.	294.		1,635.
25	Contributions, gifts, grants paid	399,580.			399,580.
26	Total expenses and disbursements. Add lines 24 and 25	406,217.	294.		401,215.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	<82,753.>			
b	Net investment income (if negative, enter -0-)		406,263.		
c	Adjusted net income (if negative enter -0-)			N/A	

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	71,330.	236,826.	236,826.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 8	1,182,520.	934,427.	1,086,987.
	c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers)	1,253,850.	1,171,253.	1,323,813.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐			
	and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	1,087,500.	1,087,500.	
28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds	166,350.	83,753.		
30 Total net assets or fund balances	1,253,850.	1,171,253.		
31 Total liabilities and net assets/fund balances	1,253,850.	1,171,253.		

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	1,253,850.
2 Enter amount from Part I, line 27a	2	<82,753.>
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 7	3	156.
4 Add lines 1, 2, and 3	4	1,171,253.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,171,253.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a WERNER ENTERPRISES - 19,100 SHARES	D	VARIOUS	VARIOUS
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 343,349.			343,349.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			343,349.
b			
c			
d			
e			

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	343,349.
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). If (loss), enter -0- in Part I, line 8	3	N/A

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 instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	164,085.	1,577,382.	.104024
2007	124,143.	1,726,441.	.071907
2006	183,092.	1,281,398.	.142885
2005	564,802.	1,423,925.	.396652
2004	106,412.	1,368,631.	.077751

2 Total of line 1, column (d)	2	.793219
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	.158644
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,133,326.
5 Multiply line 4 by line 3	5	179,795.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	4,063.
7 Add lines 5 and 6	7	183,858.
8 Enter qualifying distributions from Part XII, line 4	8	401,215.

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 instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. -Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	4,063.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	4,063.
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	4,063.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	2,820.	
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	2,820.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	15.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	1,258.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ☒ Refunded ☐	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a 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
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 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.		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? If "Yes," attach a detailed description of the activities		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? If "Yes," attach a conformed copy of the changes		X
4a 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?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		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? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ NE		
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? If "No," attach explanation	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)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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?	13	X	

Website address **N/A**

14 The books are in care of **LISA STRUTZEL** Telephone no. **402-496-7200**
 Located at **14301 FNB PARKWAY, SUITE 115, OMAHA, NE** ZIP+4 **68154**

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ☐
 and enter the amount of tax-exempt interest received or accrued during the year **15** **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
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
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
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	☐ Yes ☒ No	
If "Yes," list the years N/A		
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 instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
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

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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)?

☐ 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)?

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?

If "Yes" to 6b, file Form 8870

6b

X

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?

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(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
GAIL WERNER-ROBERTSON 14301 FNB PARKWAY, SUITE 115 OMAHA, NE 68154	TRUSTEE 2.00	0.	0.	0.
GLORIA WERNER 1222 N 97TH PLZ OMAHA, NE 68114	DIRECTOR 1.00	0.	0.	0.
SCOTT ROBERTSON 1215 N 136TH ST OMAHA, NE 68154	DIRECTOR 1.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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

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	1,085,221.
b	Average of monthly cash balances	1b	65,364.
c	Fair market value of all other assets	1c	0.
d	Total (add lines 1a, b, and c)	1d	1,150,585.
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	1,150,585.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	17,259.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,133,326.
6	Minimum investment return. Enter 5% of line 5	6	56,666.

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	56,666.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	4,063.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	4,063.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	52,603.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	52,603.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	52,603.

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	401,215.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
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	401,215.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	4,063.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	397,152.

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				52,603.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	11,992.			
b From 2005	493,956.			
c From 2006	123,456.			
d From 2007	39,678.			
e From 2008	88,940.			
f Total of lines 3a through e	758,022.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$	401,215.			
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				52,603.
e Remaining amount distributed out of corpus	348,612.			
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	1,106,634.			
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 instr.			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)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	11,992.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	1,094,642.			
10 Analysis of line 9:				
a Excess from 2005	493,956.			
b Excess from 2006	123,456.			
c Excess from 2007	39,678.			
d Excess from 2008	88,940.			
e Excess from 2009	348,612.			

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

N/A

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

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

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

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see the instructions.)**1 Information Regarding Foundation Managers:**

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

GAIL WERNER-ROBERTSON

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

NONE**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

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

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

- b The form in which applications should be submitted and information and materials they should include:

- c Any submission deadlines:

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

Part XVII

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

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

[illegible]

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Sign Here

Signature of officer or trustee

Date _____

Title

Paid
Preparer'sPreparer's
signature

Firm's name (or yours
if self-employed),
address, and ZIP code

Julie M. Wiman

Date _____

5.6.2010

Check if self- employee	
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Preparer's identifying number

FIN ▶

Phone no. (402) 330-2660

Form **990-PF** (2009)

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2009

Name of the organization

ROBERTSON FAMILY FOUNDATION

Employer identification number

91-1816672

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions
for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization

Employer identification number

ROBERTSON FAMILY FOUNDATION

91-1816672

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	GAIL WERNER ROBERTSON 14301 FNB PARKWAY, SUITE 115 OMAHA, NE 68154	\$ 165,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

FORM 990-PF	GAIN OR (LOSS) FROM SALE OF ASSETS	STATEMENT	1
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(A) DESCRIPTION OF PROPERTY		MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
WERNER ENTERPRISES - 19,100 SHARES		DONATED	VARIOUS	VARIOUS
(B) GROSS SALES PRICE	(C) VALUE AT TIME OF ACQ.	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
343,349.	248,093.	0.	0.	95,256.
CAPITAL GAINS DIVIDENDS FROM PART IV				0.
TOTAL TO FORM 990-PF, PART I, LINE 6A				95,256.

FORM 990-PF	INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS	STATEMENT	2
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SOURCE	AMOUNT
UBS	22.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	22.

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	3
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
UBS	63,186.	0.	63,186.
TOTAL TO FM 990-PF, PART I, LN 4	63,186.	0.	63,186.

FORM 990-PF	ACCOUNTING FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTANT	1,500.	225.		1,275.	
TO FORM 990-PF, PG 1, LN 16B	1,500.	225.		1,275.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ADMINISTRATIVE	400.	40.		360.	
BANK CHARGES	29.	29.		0.	
TO FORM 990-PF, PG 1, LN 16C	429.	69.		360.	

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
TAXES	4,708.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	4,708.	0.		0.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES			STATEMENT	7
DESCRIPTION	AMOUNT				
ADDITIONAL DIVIDENDS RECEIVED FROM 2008 PREVIOUSLY REPORTED IN 2008	156.				
TOTAL TO FORM 990-PF, PART III, LINE 3	156.				

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
UBS FINANCIAL SERVICES	934,427.	1,086,987.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	934,427.	1,086,987.	

FORM 990-PF	GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR	STATEMENT	9
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RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
AAA CENTER FOR PREGNANCY COUNSELING 6510 SORENSEN PKWY. OMAHA, NE 68152	N/A PREGNANCY COUNSELING SUPPORT	509(A)(2)	50.
KNIGHTS OF AK-SAR-BEN FOUNDATION 302 SOUTH 36 STREET OMAHA, NE 68131	N/A SCHOLARSHIP PROGRAM	509(A)(2)	9,000.
ALZHEIMER'S ASSOCIATION 1941 SOUTH 42 STREET OMAHA, NE 68105	N/A SUPPORT FOR FAMILIES SUFFERING WITH ALZHEIMER'S DISEASE	509(A)(2)	500.
AMERICAN INSTITUTE FOR STUTTERING 27 WEST 20 STREET NEW YORK, NY 10011	N/A SUPPORT FOR STUTTERING PROGRAMS	509(A)(2)	2,000.
AMERICAN RED CROSS HEARTLAND CHAPTER 2912 SOUTH 80 AVENUE OMAHA, NE 68124	N/A SUPPORT FOR CHILDREN & ADULT SERVICES	509(A)(1)	10,000.
CATHOLIC CHARITIES - ARCHBISHOP'S DINNER FOR EDUCATION - 3300 NORTH 60 STREET OMAHA, NE 68104	N/A TEACHER RECOGNITION EVENT	509(A)(2)	1,500.

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BOYS TOWN NATIONAL RESEARCH HOSPITAL 14000 BOYS TOWN HOSPITAL ROAD BOYS TOWN, NE 68010	N/A MEDICAL MISSION TO THE DOMINICAN REPUBLIC	509(A)(1)	500.
CHILD SAVING INSTITUTE 4545 DODGE STREET OMAHA, NE 68132	N/A ASSISTANCE IN BATTLING CHILD ABUSE AND NEGLECT	509(A)(1)	1,500.
CHILDREN'S RESPITE CARE CENTER 13336 INDUSTRIAL ROAD OMAHA, NE 68137	N/A SUPPORT FOR CHILDREN WITH DISABILITIES	509(A)(2)	1,250.
CHILDREN'S SCHOLARSHIP FUND OF OMAHA 3212 NORTH 60 STREET OMAHA, NE 68104	N/A SCHOLARSHIPS FOR UNDERPRIVILEGED CHILDREN	509(A)(2)	25,000.
COLLEGE OF ST. MARY 7000 MERCY ROAD OMAHA, NE 68106	N/A MOTHERS LIVING AND LEARNING WALSH RENOVATION	509(A)(1)	20,200.
COMMUNITY ALLIANCE METAL HEALTH RECOVERY 4001 LEAVENWORTH STREET OMAHA, NE 68105	N/A SUPPORT FOR COMBATING METAL ILLNESS	509(A)(2)	2,500.
THE COMPASSIONATE FRIENDS - OMAHA CHAPTER P.O. BOX 540852 OMAHA, NE 68154	N/A SUPPORT FOR BEREAVED FAMILIES	509(A)(2)	500.
CREIGHTON PREP 7400 WESTERN AVENUE OMAHA, NE 68114	N/A SUPPORT FOR EDUCATION	509(A)(1)	4,400.
THE DURHAM MUSEUM 801 SOUTH 10 STREET OMAHA, NE 68108	N/A SUPPORT OF THE ARTS	509(A)(1)	7,500.
EASTER SEALS NEBRASKA 638 NORTH 109 PLAZA OMAHA, NE 68154	N/A SUPPORT FOR INDIVIDUALS WITH DISABILITIES	509(A)(1)	2,500.

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EDUCATÈ UGANDA 2256 SOUTH 186 STREET OMAHA, NE 68130	N/A SCHOLARSHIPS TO STUDENTS	509(A)(1)	125.
ESSENTIAL PREGNANCY SERVICES 6220 MAPLE STREET OMAHA, NE 68104	N/A PREGNANCY COUNSELING SUPPORT	509(A)(1)	250.
THE FOOD BANK 6824 "J" STREET OMAHA, NE 68117	N/A FOOD DONATIONS FOR THE UNDERPRIVILEGED	509(A)(1)	1,500.
GREATER OMAHA ALLIANCE FOR BUSINESS ETHICS 2500 CALIFORNIA PLAZA OMAHA, NE 68178	N/A SUPPORT FOR BUSINESS ETHIC PROGRAMS	509(A)(1)	500.
HOPE CENTER FOR KIDS 2200 NORTH 20 STREET OMAHA, NE 68120	N/A SUPPORT FOR YOUTH AND CHILDRENS PROGRAMS IN THE INNTER CITY	509(A)(1)	1,000.
INDIANA UNIVERSITY FOUNDATION P.O. BOX 500 BLOOMINGTON, IN 47402	N/A SUPPORT FOR SWIM PROGRAM	509(A)(1)	15,000.
CREIGHTON UNIVERSITY - THE INSTITUTE FOR PRIESTLY FORMATION 2500 CALIFORNIA PLAZA OMAHA, NE 68178	N/A SUPPORT SPIRITUAL FORMATION OF PRIESTS	509(A)(1)	500.
KICKS FOR A CURE 417 SOUTH 93 STREET OMAHA, NE 68114	N/A SUPPORT FOR CANCER RESEARCH	509(A)(1)	1,000.
K.J.'S CARTS FOR KIDS 2916 SOUTH 132 STREET OMAHA, NE 68144	N/A SUPPORT FOR CHILDREN IN NEED	509(A)(2)	750.
LAURITZEN GARDENS 100 BANCROFT STREET OMAHA, NE 68108	N/A DEVELOPMENT OF THE GARDENS	509(A)(2)	2,500.

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Organization Name and Address	Notes	Account Number	Amount
MARIAN HIGH SCHOOL 7400 MILITARY AVENUE OMAHA, NE 68134	N/A SUPPORT FOR EDUCATION	509(A)(1)	60,454.
MOUNT MICHAEL SCHOOL 22520 MOUNT MICHAEL ROAD ELKHORN, NE 68022	N/A SUPPORT FOR EDUCATION	509(A)(1)	5,000.
ST. THOMAS AQUINAS CATHOLIC CHURCH 3835 HOLDREGE STREET LINCOLN, NE 68583	N/A NEWMAN CENTER SUPPORT	509(A)(1)	5,000.
OMAHA COMMUNITY FOUNDATION 302 SOUTH 36 STREET OMAHA, NE 68131	N/A SUPPORT FOR FIREFIGHTERS	509(A)(1)	500.
PLATTE INSTITUTE FOR ECONOMIC RESEARCH 10050 REGENCY CIRCLE OMAHA, NE 68114	N/A SUPPORT FOR ECONOMIC RESEARCH	509(A)(2)	5,000.
PROJECT HARMONY 7110 "F" STREET OMAHA, NE 68117	N/A SUPPORT FOR ABUSED CHILDREN	509(A)(1)	2,500.
R.E.S.P.E.C.T. 820 SOUTH 75 STREET OMAHA, NE 68114	N/A SUPPORT FOR CHILDRENS PROGRAM ABOUT VIOLENCE	509(A)(2)	500.
ST. BENEDICT THE MOOR CHURCH 2423 GRANT STREET OMAHA, NE 68104	N/A SUPPORT - CHECK NOT CASHED	509(A)(1)	<50.>
ST. WENCESLAUS PARISH 15353 PACIFIC STREET OMAHA, NE 68154	N/A SUPPORT OF MINISTRY	509(A)(1)	10,000.
THE SALVATION ARMY 3612 CUMING STREET OMAHA, NE 68131	N/A ASSISTANCE FOR THOSE IN NEED	509(A)(1)	3,000.

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V.J. AND ANGELA SKUTT CATHOLIC HIGH SCHOOL 3131 SOUTH 156 STREET OMAHA, NE 68130	N/A SUPPORT FOR EDUCATION	509(A)(1)	1,000.
SPIRIT CATHOLIC RADIO 5829 NORTH 60 STREET OMAHA, NE 68104	N/A SUPPORT OF MISSION OF EVANGELIZATION	509(A)(1)	10,000.
UMCC WESLEY HOUSE 2001 NORTH 35 STREET OMAHA, NE 68111	N/A SUPPORT OF YOUTH COMMUNITY SERVICE PROGRAMS	509(A)(1)	1,000.
UNIVERSITY OF NEBRASKA FOUNDATION 2285 SOUTH 67 STREET OMAHA, NE 68106	N/A SUPPORT OF AUTISM PROGRAMS	509(A)(1)	171,151.
UNIVERSITY OF NEBRASKA OMAHA 6001 DODGE STREET OMAHA, NE 68182	N/A SUPPORT FOR EDUCATION	509(A)(1)	11,000.
UNITED SERVICE ORGANIZATION P.O. BOX 96860 WASHINGTON, DC 20087	N/A SUPPORT FOR ARMED FORCES	509(A)(1)	500.
CATHOLICS COME HOME, INC. 1000 EAST MAPLE AVENUE MUNDELEIN, IL 60060	N/A WORD ON FIRE CATHOLIC MINISTRIES	509(A)(2)	1,000.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

399,580.