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Form 990-PF

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 cal	enda	r year 2009, or t	ax year beginni	ng	, 2009	, and ending	,	
G Ch	eck a	Il that apply.	Initial return	Init	ial Return of a former p	ublic charity	Fin	al return
		,	Amended reti		Address	· —	لبا	
	. 1		7 1111011404 1011	4111		A A	Employer identification nu	mher
Use t IRS lai		THE LARSON	TECACY			*	• •	iliber
Otherw			RAUSE LANE			<u></u>	91-1859861	
prin	. ' 1	HAPPY VALL			524	В	Telephone number (see the	•
or typ	<i>ie.</i>	HALLI AVIT	E1, OR 9/0	00-0	334	<u></u>	(503) 593-56	74
See Spe						C	If exemption application is	pending, check here
Instruct	ions.					D	1 Foreign organizations, che	ck here
H C	heck	type of organiza	tion X Sec	tion 50	1(c)(3) exempt private f		2 Foreign organizations mee	
ſ		ection 4947(a)(1)				orivate foundation	here and attach computati	on ►
I Fa		rket value of all asset			counting method: X C		If private foundation statu	
		art II, column (c), line			Other (specify)	_	under section 507(b)(1)(A	
► \$		2,440	· .	(Part I		F	If the foundation is in a 60	
				(Part i	, column (d) must be or	Cash Dasis)	under section 507(b)(1)(B), check here
Part I		nalysis of Re			(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements
		xpenses (The olumns (b), (c), a	total of amounts	s in	expenses per books	ıncome	income	for charitable
	58	arily equal the ar	mounts in colum	neces- n (a)	j			purposes (cash basis only)
	(s	ee the instructio	ns))	(-)				(Casii Dasis Oilly)
	1	Contributions, gifts,	grants, etc, received	(att sch)	120,000.			
	2	Ck ► if the fo	oundn is not req to at	Sch B				
	3		ings and tempor					
	j	cash investmer		•	18,088.	18,088.	N/A	
	4	Dividends and inter	rest from securities		24,544.	24,544.		
		Gross rents						
		O Net rental income or (loss)						
R	6 a	Net gain/(loss) from	sale of assets not on	line 10	-145,617.			
R E V	t	Gross sales price for assets on line 6a	rall 1,039,	701.	,		17 /	
	7		ome (from Part IV, Iin			0.		
N	8	Net short-term				<u> </u>	REC	EIVEL.
E N U E	9	Income modific						IOI
Ε		Gross sales less returns and						
		returns and allowances					O OCT 2	2 2010
	l t	Less Cost of goods sold						2 2010
	_ ا	-	(att pob)					
		: Gross profit/(loss) Other income (- OGDI	<u>EN, U I — — </u>
	''	Other income (attaci i scriedule,	,			<u> </u>	
	12	Total. Add lines	- 1 through 11		17.015	40 600		
	13				17,015.	42,632.		
		•	icers, directors, truste		J	49		
	14	• •	aries and wages , .					
		Pension plans,		tits				
A		Legal fees (attach s	•					
M	L E	Accounting fees (at	tach sch) SEE	ST 1	16,650.	4,150.		12,500.
0	C	Other prof fees (att	ach sch)					
O Î	17	Interest						
06至2202-784前30 2maxm m<	18	Taxes (attach schedule)(sc	ee instr) SEE S	TM 2	744.	300.		285.
CAD A	19	Depreciation (a	ttach			-	<u>-</u> -	
(T) T		sch) and deplet	tion					
- - > 1	20	Occupancy						
GZ E	21		nces, and meeti	ngs	43,338.			43,338.
W- E	22	Printing and pu						
اغ کی	23	Other expenses	(attach schedu	le)				
ا k			EE STATEME		22,717.	22,251.		466.
Fit OBY	24	Total operating	and administra	tive		06 501		F.C. 700
<u></u>			lines 13 through		83,449.	26,701.		<u>56,589.</u>
	25		grants paid PART		305,391.			305,391.
°₹3	26	Total expenses	and disbursem	ents.	200 040	06 701		261 000
C. NAINET	<u> </u>	Add lines 24 an			388,840.	26,701.		361,980.
J.	27							•
	а	Excess of rever and disbursem	nue over expens ents	Ses .	-371,825.			
	L	Net investment inco		-0.3	3/1/023.	15,931.		
ļ			· -					
		Adjusted net income	o (ii negative, enter -t	,·)				



Part		Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year		or year
		(See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash — non-interest-bearing			
	_	Savings and temporary cash investments	1,390,187.	156,596.	156,596.
	3	Accounts receivable			
		Less: allowance for doubtful accounts			<u> </u>
	4	Pledges receivable			
	_	Less allowance for doubtful accounts			
	5	Grants receivable		.er	
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
_	7	Other notes and loans receivable (attach sch)	,		
A		Less: allowance for doubtful accounts ▶			
<u>š</u>	8	Inventories for sale or use		···	
A S E T	9	Prepaid expenses and deferred charges			
Ś	10	a Investments – US and state government	05 061	05 061	101 406
		obligations (attach schedule) . STATEMENT 4	95,861.	95,861.	
		b Investments — corporate stock (attach schedule) STATEMENT 5	790,490. 196,823.	477,350. 1,129,602.	564,318. 1,139,294.
	1	c Investments — corporate bonds (attach schedule) STATEMENT 6	190,023.	1,129,002.	1,139,294.
	''	Investments — land, buildings, and equipment basis			
		Less: accumulated depreciation (attach schedule) ►			
	12	Investments – mortgage loans			
	13	Investments – other (attach schedule) STATEMENT 7	209,000.	438,769.	473,616.
	14	Land, buildings, and equipment: basis			
		Less: accumulated depreciation (attach schedule).			
		Other assets (describe ► SEE STATEMENT 8)	4,541.	5,105.	5,105.
	16	Total assets (to be completed by all filers – see instructions. Also, see page 1, item l)	2,686,902.	2,303,283.	2,440,335.
Ļ	17	Accounts payable and accrued expenses			<u> </u>
Å	18	Grants payable.			<u> </u>
A B	19				1
Ĺ	20	Loans from officers, directors, trustees, & other disqualified persons			
Ŧ	21	Mortgages and other notes payable (attach schedule)	64 605	50 001	4
- 1	22	Other liabilities (describe ► SEE STATEMENT 9)	64,625.	52,831.	_
E S	23	Total liabilities (add lines 17 through 22)	64,625.	52,831.	
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
ΝF	24	Unrestricted			_
N F E U T N	25	Temporarily restricted			
D	26	Permanently restricted			4
A B S A L T A		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
ΕL	27	Capital stock, trust principal, or current funds			1
SNC	28	Paid-in or capital surplus, or land, building, and equipment fund			1
O E	29	Retained earnings, accumulated income, endowment, or other funds	2,622,277.	2,250,452.	4
R S	30	Total net assets or fund balances (see the instructions)	2,622,277.	2,250,452.	-
	31	Total liabilities and net assets/fund balances (see the instructions)	2,686,902.	2,303,283.	
Part	III	Analysis of Changes in Net Assets or Fund Balance	es		
1	Tota	I net assets or fund balances at beginning of year — Part II, colu	mn (a), line 30 (must ag	ree with	
	end-	of-year figure reported on prior year's return)	,,,	<u> </u>	2,622,277.
		er amount from Part I, line 27a	•	2	-371,825.
3		ıncreases not included in line 2 (itemize)		3	0.050.450
4		lines 1, 2, and 3		4	2,250,452.
5		ases not included in line 2 (itemize)	Port II solver (b)	ne 30 6	2,250,452.
6_	rota	I net assets or fund balances at end of year (line 4 minus line 5)	- Fart II, Column (b), III	16 20 p	4,430,434.

Page 3

Par	t IV Capital Gains and L	osses for Tax on Investment	Income				7.15
	(a) List and describe 2-story brick warehous	e the kind(s) of property sold (e.g., ise, or common stock, 200 shares Mi	real estate, LC Company)	(b) How acc P — Purch D — Dona	nase	(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a	PUBLICLY TRADED SEC	URITIES (ST)		P		VARIOUS	VARIOUS
	PUBLICLY TRADED SEC			<u> P</u>		VARIOUS	VARIOUS
	PUBLICLY TRADED SEC	URITIES (CGD)		P		VARIOUS	VARIOUS
	SECTION 1256 CONTRA			P		VARIOUS	VARIOUS
е	SECTION 1256 CONTRA	CTS (EIN 87-0778062)		P		VARIOUS	VARIOUS
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other ba plus expense of sa			(h) Gain or (e) plus (f) m	(loss) inus (g)
г	541,928.		63	6,819.		<u></u>	-94,891.
t			54	8,499.			-57,056.
							335.
							2,398.
e							3,597.
	(i) Fair Market Value as of 12/31/69	ring gain in column (h) and owned b (j) Adjusted basis as of 12/31/69	(k) Excess of column over column (j), if a	n (i)	g tha	(I) Gains (Coli ain minus column (J an -0-) or Losses (fr	(), but not less
a	<u> </u>						-94,891.
Ŀ)						-57,056.
	:						335.
	1						2,398.
e							3,597.
2	Capital gain net income or (ne	t capital loss) - If gain, also If (loss), ent	enter in Part I, line 7 ter -0- in Part I, line 7		2		-145,617.
3	Net short-term capital gain or	(loss) as defined in sections 1222(5)	and (6).				
		e 8, column (c) (see the instructions	_				
	in Part I, line &	. (see the instructions	5) 11 (1033), CINCI -0-		3		-92,493.
Par	t V Qualification Under	Section 4940(e) for Reduced	d Tax on Net Investme	ent Inco	me		
Was If 'Ye	es,' the foundation does not qua	ction 4942 tax on the distributable a ilify under section 4940(e) Do not c	omplete this part			. Yes	X No
		in each column for each year, see t		ing any er	itries		
	(a) Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	(c) Net value of noncharitable-use as	sets	(col	(d) Distributior umn (b) divided	
	2008	434,123.	3,15	9,981.			0.137382
	2007	916,443.		7,888.			0.237550
	2006	596,552.	4,01	5,896.			0.148548
	2005	123,535.	4,16	5,264.			0.029658
	2004	217,071.	3,93	9,670.			0.055099
2	Total of line 1, column (d) .				2		0.608237
3	Average distribution ratio for the number of years the foundation	ne 5-year base period — divide the t n has been in existence if less than	total on line 2 by 5, or by tl 5 years	he	3		0.121647
4	Enter the net value of nonchar	ritable-use assets for 2009 from Par	t X, line 5	-	4		2,429,527.
5	Multiply line 4 by line 3 .				5		295,545.
6	Enter 1% of net investment inc	come (1% of Part I, line 27b)			6_		159.
7	Add lines 5 and 6				7		295,704.
8	Enter qualifying distributions fr	om Part XII, line 4			8		361,980.
	If line 8 is equal to or greater the Part VI instructions.	than line 7, check the box in Part VI	l, line 1b, and complete tha	at part usii	ng a	1% tax rate. Se	e the

Forn	n 990-PF (2009) THE LARSON LEGACY	1-1859861		F	Page 4
Par	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 -	see the instruc	tions)		
1 8	a Exempt operating foundations described in section 4940(d)(2), check here .				
	Date of ruling or determination letter: (attach copy of letter if necessary - see instr.)				
ŀ	b Domestic foundations that meet the section 4940(e) requirements in Part V,	1			<u> 159.</u>
	check here ► X and enter 1% of Part I, line 27b				
C	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			<u> 159.</u>
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-				<u>0.</u>
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5			<u> 159.</u>
6	Credits/Payments.				
	a 2009 estimated tax pmts and 2008 overpayment credited to 2009 6a				
	D Exempt foreign organizations — tax withheld at source 6b	, 			
	Tax paid with application for extension of time to file (Form 8868) . 6c 40	''			
	d Backup withholding erroneously withheld . 6d	 			400
,	Total credits and payments Add lines 6a through 6d Enter any penalty for underpayment of estimated tax. Check here	8			<u>400.</u>
٥	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			241.
	Enter the amount of line 10 to be; Credited to 2010 estimated tax	► 11			0.
_	t VII-A Statements Regarding Activities				_ 0.
		 		Yes	No
1 a	a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did in participate or intervene in any political campaign?	t	1a		X
ħ	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?		1ь		x
	If the answer is 'Yes' to 1a or 1b , attach a detailed description of the activities and copies of any materials or distributed by the foundation in connection with the activities	s published			
	Did the foundation file Form 1120-POL for this year?		1 c		X
c	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:	0			
	(1) On the foundation \(\brace \\$ \) (2) On foundation managers \(\brace \\$ \) Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposes	ed on			
	foundation managers >\$ 0.	,cu 011			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		2		Х
	If 'Yes,' attach a detailed description of the activities				
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, art	ıcles			
_	of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		3		X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	• •	4a		X
	olf 'Yes,' has it filed a tax return on Form 990-T for this year?		4b	N	/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		X
	If 'Yes,' attach the statement required by General Instruction T.				
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	at conflict	ا ۽ ا	v	
-	with the state law remain in the governing instrument? Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV		6 7	X	
7 0-	Enter the states to which the foundation reports or with which it is registered (see the instructions)	•	-		
Ų a	OR				
b	o If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G? If 'No,' attach explanation</i> .		8ь	Х	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3 for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If 'Yes,' compared to the section of the sec) or 4942(j)(5) plete Part XIV	9		X
	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing the and addresses.		10		Х
BAA		Fo	rm 99 0	O-PF (

orm 990-PF (2009) THE LARSON LEGACY	91-185986	<u> </u>	<u> </u>	age 5
Part VII-A Statements Regarding Activities Continued				
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		Х
12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?		12		х
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption Website address ► N/A	n application?	13	Х	
website address 14 The books are in care of ► LELAND E.G. LARSON Telephone	e no. ► (503)	593-	- -	<u>-</u>
Located at ► 14404 SE KRAUSE LANE HAPPY VALLEY OR ZIP + 4 ►	97086-653	4		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		N/A	, -	
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			1	
File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.			Yes	No
1 a 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 X No			
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes X No	`		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No		ij	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	X 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 X 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 X No			
b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see the instruction	ons)?	1ь		Х
Organizations relying on a current notice regarding disaster assistance check here	► 🗌		İ	
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		Х
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):				
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	Yes X No			
If 'Yes,' list the years ► 20 , 20 , 20				
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942 (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942)	(a)(2) (a)(2) to			
all years listed, answer 'No' and attach statement — see the instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years		2b	N	/A
► 20, 20, 20	nere			
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	Yes X 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 approve 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	d	2 h	N	/A
determine if the foundation had excess business holdings in 2009.)		3b	IA	<u>, n</u>
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		Х
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of				
the tax year beginning in 2009?		4b		X
200	Fo	rm 990	LPE /	つりいりょう

Port VII P Statements Posseding Activity	ios for Which Form	4720 May Ba Bas	91-10:	33001	Page 6
Part VII-B Statements Regarding Activit		ii 4/20 iiiay be keq	uirea (continuea)		
(1) Carry on propaganda, or otherwise attem	•	on (section 4945(e))?	☐ Yes X	No	
(2) Influence the outcome of any specific put	_				
on, directly or indirectly, any voter registr	ation drive?		\vdash	No	
(3) Provide a grant to an individual for travel	-		. Yes X	No	Ì
(4) Provide a grant to an organization other t in section 509(a)(1), (2), or (3), or section	n 4940(d)(2)? (see ınstr	uctions)	. Yes X	No	i
(5) Provide for any purpose other than religion educational purposes, or for the prevention	ous, charitable, scientific on of cruelty to children	c, literary, or or animals?	Yes X	No	
b If any answer is 'Yes' to 5a(1)-(5), did any of described in Regulations section 53 4945 or ii (see instructions)?	the transactions fail to n a current notice regar	qualify under the excep ding disaster assistance	tions - 	5b	N/A
Organizations relying on a current notice rega	ardıng disaster assistan	ce check here	▶ □		
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure response if 'Yes,' attach the statement required by Reg	isibility for the grant?		N/A Yes	No	
6a Did the foundation, during the year, receive a on a personal benefit contract?			S ☐ Yes $[\overline{X}]$	No	,
b Did the foundation, during the year, pay prem	iums, directly or indirec	ctly, on a personal bene	fit contract?	6b	X
If 'Yes' to 6b, file Form 8870 7a At any time during the tax year, was the foun	dation a party to a prob	nibited tax shelter transa	ction? Yes X	No	
b If yes, did the foundation receive any proceed	ls or have any net incor	me attributable to the tra	ansaction?	7b	N/A
Part VIII Information About Officers, D and Contractors	irectors, Trustees,	Foundation Manag	ers, Highly Paid E	mployees,	
1 List all officers, directors, trustees, foundation	on managers and their	compensation (see inst	ructions).		
	(b) Title and average		(d) Contributions to	(e) Expense	account,
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	employee benefit plans and deferred compensation	other allov	
_LELAND_E.GLARSON	PRESIDENT	0.	0.		0.
14404 SE KRAUSE LANE	15.00			:	
HAPPY VALLEY, OR 97086-6534					
_KATHLEEN C. LARSON	VP	0.	0.	ļ	0.
10961 SE RIMROCK DRIVE	10.00				
PORTLAND, OR 97236-7032	CEC /MDEAC			 	
DAVID LARSON	SEC/TREAS	0.	0.		0 .
18345 BERNARDO TRAILS DRIVE SAN DIEGO, CA 92128	5.00			i	
	-		· · · · ·		
2 Compensation of five highest-paid employee	es (other than those inc	cluded on line 1— see ir	structions). If none, er	nter 'NONE.'	
(a) Name and address of each employee	(b) Title and average	(c) Compensation	(d) Contributions to	(e) Expense	
paid more than \$50,000	hours per week devoted to position		employee benefit plans and deferred compensation	other allov	vances
NONE			Compensation		
				,,,,,,	
					•
	{				
	1				
Total number of other employees paid over \$50,000)	·	>		0
BAA	TEEA0306L 0	07/06/09		Form 990- I	PF (2009)

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid and Contractors (continued)	Employees,
3 Five highest-paid independent contractors for professional services — (see instructions). If none, enter 'NONE.'	
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
NONE	
	
	<u> </u>
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	
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 <u>N/A</u>	
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 <u>N/A</u>	
2	
	<u> </u>
All other program-related investments. See instructions. 3	
~	
Total. Add lines 1 through 3 ▶	0.
BAA	Form 990-PF (2009)

Form 990-PF (2009) THE LARSON LEGACY	91-185986	1 Page 8
Part X Minimum Investment Return (All domestic foundations must complete this part see instructions.)	. Foreign fou	ndations,
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		1 200 011
	1a 1b	1,388,011. 1,069,409.
b Average of monthly cash balances	1 c	9,105.
c Fair market value of all other assets (see instructions)	1d	2,466,525.
d Total (add lines 1a, b, and c).	- 1 a	2,400,323.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	0.	
(attach detailed explanation)	2	0
3 Subtract line 2 from line 1d.	3	2,466,525.
		2,400,323.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions).	4	36,998.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,429,527.
6 Minimum investment return. Enter 5% of line 5	6	121,476.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private o		
and certain foreign organizations check here		laations
1 Minimum investment return from Part X, line 6	1	121,476.
	59.	111/1/01
b Income tax for 2009. (This does not include the tax from Part VI.) . 2b		
c Add lines 2a and 2b	2c	159.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	121,317.
4 Recoveries of amounts treated as qualifying distributions .	4	
5 Add lines 3 and 4	5	121,317.
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	121,317.
Part XII Qualifying Distributions (see instructions)		<u> </u>
1 Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes: a Expenses, contributions, gifts, etc — total from Part I, column (d), line 26 . 	1 a	361,980.
b Program-related investments — total from Part IX-B	1 b	
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	361,980.
	-	301,300.
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	159.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	361,821.
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating qualifies for the section 4940(e) reduction of tax in those years.	whether the four	ndation
BAA	Fo	rm 990-PF (2009)

Page 9

Part XIII Undistributed Income (see instructions)

(a) (b) (c) Corpus Years prior to 2008 2008	
1 Distributable amount for 2009 from Part XI,	121,317.
line 7 2 Undistributed income, if any, as of the end of 2009.	121,311.
a Enter amount for 2008 only	
b Total for prior years: 20 , 20 , 20 O.	
3 Excess distributions carryover, if any, to 2009.	
a From 2004 22, 674.	
b From 2005	
c From 2006 401, 609.	
d From 2007 733, 623.	
e From 2008 277, 252.	
f Total of lines 3a through e 1, 435, 158.	
4 Qualifying distributions for 2009 from Part	
XII, line 4 ► \$ 361, 980.	
a Applied to 2008, but not more than line 2a	
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	121,317.
e Remaining amount distributed out of corpus 240,663.	
5 Excess distributions carryover applied to 2009 0.	0.
(If an amount appears in column (d), the same amount must be shown in column (a))	
Same amount must be shown in column (a) y	
6 Enter the net total of each column as	
indicated below:	
a Corpus Add lines 3f, 4c, and 4e. Subtract line 5 1, 675, 821.	
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.	
line 2a. Taxable amount — see instructions.	
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)	
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions) 22,674.	
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 1, 653, 147.	
10 Analysis of line 9	
a Excess from 2005	
b Excess from 2006 401, 609.	
c Excess from 2007 733, 623.	
d Excess from 2008 277, 252.	
e Excess from 2009 240, 663.	90-PF (2009)

Form 990-PF (2009) THE LAKSON LEGACY		 		91-1859861	. Page 10
Part XIV Private Operating Foundation					N/A
1a If the foundation has received a ruling or de is effective for 2009, enter the date of the r	etermination lettei ulina	that it is a private	operating foundation	, and the ruling	
b Check box to indicate whether the foundation		erating foundation of	described in section	4942(j)(3) or	4942(J)(5)
2a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum investment return from Part X for	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
each year listed					<u>-</u>
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()(3)(B)(iii)	•	ł			
(3) Largest amount of support from an exempt organization					
(4) Gross investment income		<u> </u>			
Part XV Supplementary Information (Complete this	part only if the	organization had	d \$5,000 or mor	e in
assets at any time during the Information Regarding Foundation Manage		structions.)			
a List any managers of the foundation who had close of any tax year (but only if they have LELAND E.G. LARSON	eve contributed m	ore than 2% of the than \$5,000). (See	total contributions re section 507(d)(2))	ceived by the found	ation before the
b List any managers of the foundation who ov	vn 10% or more c	of the stock of a cor	poration (or an equa	lly large portion of t	he ownership of
a partnership or other entity) of which the for NONE	oundation has a I	0% or greater inter	est.		
2 Information Regarding Contribution, Grant	, Gift, Loan, Scho	larship, etc, Progra	ams:		
Check here \times If the foundation only material in the foundation makes complete items 2a, b, c, and d.					
a The name, address, and telephone number	of the person to	whom applications	should be addressed	 -	
, , , ,	·	• •			
SEE STATEMENT 10					
b The form in which applications should be su	ibmitted and infor	mation and materia	als they should includ	le	
SEE STATEMENT FOR LINE 2A					
c Any submission deadlines.		······································			
SEE STATEMENT FOR LINE 2A					
d Any restrictions or limitations on awards, su	ich as by geograp	hical areas, charita	ble fields, kinds of in	stitutions, or other	factors.
SEE STATEMENT FOR LINE 2A					

Page 11

Part XV Supplementary Information (c	continued)		<u> </u>	07001 Tage 1
3 Grants and Contributions Paid During the Ye	ar or Approved for Fut	ure Pavmen	†	
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient	contribution	Amount
a Paid during the year				
SEE SUPPLEMENTAL SCHEDULE	NONE	PUBLIC	SEE SUPPLEMENTAL	305,391.
,			SCHEDULE	
Total			<u> </u>	305,391.
b Approved for future payment				303,331.
,				
N/A				
		•		
Total		l	<u>►</u> 3b	

Part XVI-A · Analysis of Income-Producing Activities

Enter gross	s amounts unless otherwise indicated	Unrelate	d business income	Excluded by	section 512, 513, or 514	
		(a) Business code	(b) Amount	(c) Exclu- sion	(d) Amount	(e) Related or exempt function income
1 Progr	am service revenue			code		(see the instructions)
						
				 		
				++-		
e		 		 		
7 F005	and contracts from government agencies .			 +		
	pership dues and assessments	 		+ +		
	t on savings and temporary cash investments .			14	18,088.	
	ends and interest from securities			14	24,544.	
	ental income or (loss) from real estate					
	financed property					
	ebt-financed property .					
	ntal income or (loss) from personal property					
7 Other	investment income					
8 Gain or	(loss) from sales of assets other than inventory			18	-145,617.	
9 Net in	ncome or (loss) from special events					
10 Gross	profit or (loss) from sales of inventory					
11 Other	revenue:			<u> </u>		
a						
b				 		
				-		
				 		
е					100.005	
10 0 1.1.	. L. L. A. L. L. L. L. C.	1				
	otal Add columns (b), (d), and (e)				-102,985.	-102 005
13 Total.	Add line 12, columns (b), (d), and (e)	alculations)		1	-102,985.] 13	-102,985.
13 Total. (See works	Add line 12, columns (b), (d), and (e) theet in the instructions for line 13 to verify contact.		hment of Exempt	Purpose	13	-102,985.
13 Total. (See works	Add line 12, columns (b), (d), and (e) theet in the instructions for line 13 to verify c B Relationship of Activities to the	Accomplis	 		13 S	
13 Total (See works Part XVI-	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) theet in the instructions for line 13 to verify c B Relationship of Activities to the	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	
13 Total. (See works Part XVI- Line No.	Add line 12, columns (b), (d), and (e) heet in the instructions for line 13 to verify of Relationship of Activities to the Explain below how each activity for which is accomplishment of the foundation's exempt	Accomplis	 		13 S	

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

				v	ac No
Did the organization directly or indirect described in section 501(c) of the Code relating to political organizations?	ly engage in any of the following wit e (other than section 501(c)(3) organ	h any other organizat iizations) or in sectior	ion n 527,	1	es No
a Transfers from the reporting foundation	to a noncharitable exempt organiza	ation of			
(1) Cash	to a nononamasio exempt organiza			1a (1)	X
(2) Other assets				1a (2)	X
b Other transactions:				14(2)	
(1) Sales of assets to a noncharitable	evernt organization			16(1)	Х
(2) Purchases of assets from a nonchar	, ,			1b(2)	X
(3) Rental of facilities, equipment, or o		• •		1b(2)	X
(4) Reimbursement arrangements	ther assets .		•	1b (3)	X
• •	••	,			$\frac{\Lambda}{X}$
(5) Loans or loan guarantees			• •	1b (5)	$\frac{\lambda}{X}$
(6) Performance of services or member	,	•	•	1 b (6)	$\frac{\Lambda}{X}$
c Sharing of facilities, equipment, mailing	dists, other assets, or paid employed	ees	• •	1c	^
d If the answer to any of the above is 'Ye the goods, other assets, or services give any transaction or sharing arrangement (a) Amount graphed (b) Amount graphed (c) No.	ren by the reporting foundation. If the t, show in column (d) the value of the terms of the training the terms of the training the terms of the training training the training training the training trai	e foundation received e goods, other assets	l less than fair mark s, or services receiv	ket value in ed.	
	me of noncharitable exempt organization	(a) Description of tr	ansfers, transactions, and	o snaring arranger	nents
A					
	·····				
				 	
					
					
a Is the foundation directly or indirectly a described in section 501(c) of the Code of If 'Yes,' complete the following schedul	(other than section 501(c)(3)) or in	ore tax-exempt organ section 527?	nizations	Yes	XNo
(a) Name of organization	(b) Type of organization		(c) Description of re	lationship	
1					
nder penalties of perjury, I declare that I have examine implete. Declaration of preparer (other tips in taxpayer of	d this return, including accompanying schedules	and statements, and to the	best of my knowledge and	belie, it is true, co	orrect, and
implete Declaration of preparer (other train taxpayer o	or tiduciary) is based on all information of which	preparer has any knowledge	1. 1		
		· i////3/	'IS/ Y	101-0	-
			<u> </u>	wire	7_
Signature of officer or trustee		Date / /	Title		
Preparer's	() _A	Date	Check if (Se	parer's Identifying e Signature in the	number instrs)
aid signature	NAV	10/11/10	I colf. ——I	0075584	•
re- arer's Firm's name (or AUSTEN & SO	., P.C., CPA'S	15:1		360208	_
se yours if self-	BSTER ROAD		20 00		
	OR 97267		Phone no ► (5	03) 659-9	434
ZIP code PILLWAUNTE,			Terione no - (3)	00, 000-9	737

Schedule B (Form 990, 990-EZ, or 990¹PF)

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		Employer identification number
THE LARSON LEGACY		91-1859861
Organization type (check one)		
Filers of:	Section:	
Form 990 or 990-EZ	501(c)() (enter number) organization	
	4947(a)(1) nonexempt charitable trust not treate	d as a private foundation
	527 political organization	
Form 990-PF	Y FOL(a)(3) exempt private foundation	
Form 590-F1	X 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as	a private foundation
	501(c)(3) taxable private foundation	, a private foundation
Check if your organization is covered by the GNote: Only a section 501(c)(7), (8), or (10) org	eneral Rule or a Special Rule. anization can check boxes for both the General Rule a	and a Special Rule. See instructions.
General Rule —		
	Z, or 990-PF that received, during the year, \$5,000 or	
contributor. (Complete Parts I and II.)	2, or 990-FF that received, during the year, \$5,000 or	more (in money or property) from any one
Special Rules —		
For a section 501(c)(3) organization filing F	form 990 or 990-EZ, that met the 33-1/3% support tes	t of the regulations under sections
509(a)(1)/170(b)(1)(A)(vi) and received from any	rone contributor, during the year, a contribution of the great or (ii) Form 990-EZ, line 1. Complete Parts I and II	er of (1) \$5,000 or (2) 2% of the
aggregate contributions of more than \$1.00	ation filing Form 990 or 990-EZ, that received from an 0 for use <i>exclusively</i> for religious, charitable, scientific	y one contributor, during the year, c, 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) organiz	ation filing Form 990 or 990-EZ, that received from an	ny one contributor, during the year,
this box is checked, enter here the total coi	is, charitable, etc, purposes, but these contributions d ntributions that were received during the year for an <i>e</i>	exclusively religious, charitable, etc.
purpose Do not complete any of the parts	unless the General Rule applies to this organization b	pecause it received nonexclusively
religious, charitable, etc, contributions of \$5	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 990-PF, to certify that it does not meet the film	e 2 of their Form 990, or check the box on line H of its g requirements of Schedule B (Form 990, 990-EZ, or	s Form 990-EZ, or on line 2 of its Form 990-PF)
BAA For Privacy Act and Paperwork Reducti	 	chedule B (Form 990, 990-EZ, or 990-PF) (2009)
for Form 990, 990EZ, or 990-PF.	on Act Notice, see the instructions 50	Tredule b (FORM 330, 330-E2, or 330-PF) (2009)

	B (Form 990, 990-EZ, or 990-PF) (2009)	F	Page 1	of 1	of Part I
Name of org	anization ARSON LEGACY		1	identification num	ber
Part I	Contributors (see instructions)		101 10	737001	
(a) Number	(b)	(c) Aggrega contributi	te ons	(c Type of co	
1	LELAND E.G. LARSON 14404 SE KRAUSE LANE HAPPY VALLEY, OR 97086-6534	\$120	,000.	Payroll Noncash	X Zart II if there contribution)
(a) Number	(b)	(c) Aggrega contributi	te ons	(d Type of co	
		\$		Person Payroll Noncash (Complete P Is a noncash	art II if there contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggrega contributi	te ons	(d Type of co	
		\$		is a noncash	
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggrega contributi	te ons	(d Type of co	
		\$		Person Payroll Noncash (Complete Pis a noncash	art II if there contribution)
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggrega contributi	te ons	(d Type of co	
		\$		is a noncash	
(a) Number	(b) Name, address, and ZIP + 4	(c) Aggrega contributi	te ons	(d Type of co	
		\$		Person Payroll Noncash (Complete Pis a noncash	art II if there contribution)

Page 1

of 1

of Part II

THE LARSON LEGACY

Employer identification number 91–1859861

Part II	Noncash Property (see instructions)			
(a) No. from Part I	(b) Description of noncash property given	FM\	(c) V (or estimate) e instructions)	(d) Date received
	N/A			
		-		
		\$		
(a) No. from Part I	(b) Description of noncash property given	FM\ (see	(c) V (or estimate) e instructions)	(d) Date received
		<u> </u> -		
		\$		
(a) No. from Part I	(b) Description of noncash property given	FM\	(c) V (or estimate) e instructions)	(d) Date received
		1		
		\$		
(a) No. from Part I	(b) Description of noncash property given	FM\(sec	(c) V (or estimate) e instructions)	(d) Date received
			40.47	
]		
		\$		
(a) No. from Part I	(b) Description of noncash property given	FM\	(c) V (or estimate) e instructions)	(d) Date received
			- ·	
		\$		
(a) No. from Part I	(b) Description of noncash property given	FM\(sec	(c) V (or estimate) e instructions)	(d) Date received
		\$		
BAA	Scher	dule B (Form 990, 990-E2	, or 990-PF) (2009)

	3 (Form 990, 990-EZ, or 990-PF) (2009)		Page 1		of Part III
Name of organ				Employer identifica	
Part III	RSON_LEGACY <i>Exclusively</i> religious, charitable, e	to individual agretification	no to coation EO:	91-185986	
Faitin	organizations aggregating more th	ian \$1,000 for the year.(Co	omplete cols (a) throu	ugh (e) and the follow	<i>)</i> ring line entry)
	For organizations completing Part III, enter contributions of \$1,000 or less for the year.	•		► \$	N/A
(a)	(b)	(c)		(d)	
No. from Part I	Purpose of gift	Use of gift	1	Description of how gi	ift is held
	N/A				
				 	
	Transferee's name, addres	(e) Transfer of gift s, and ZIP + 4	Relationshi	p of transferor to tran	nsferee
					
					
(a)	(b)	(c)		(d)	
No. from Part I	Purpose of gift	Use of gift		Description of how gi	ft is held
	Transferee's name, addres	(e) Transfer of gift s. and ZIP + 4	Relationshi	p of transferor to tran	nsferee
					×
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift		(d) Description of how gi	ft is held
		 -			
		(e)			-
	Transferee's name, addres	Transfer of gift s. and ZIP + 4	Relationshi	p of transferor to tran	ısferee
					
				_	
(a)	(b)	(c)		(d)	
No. from Part I	Purpose of gift	Use of gift		Description of how gi	ft is held
		(e) Transfer of gift			
	Transferee's name, addres		Relationshi	p of transferor to tran	sferee

2009	FEDE	ΞR	AL STATI	ΞΜΙ	ENTS	·-		PAGE 1
	Т	HE	LARSON LE	GAC	Y			91-1859861
STATEMENT 1 FORM 990-PF, PART I, LINE 16B ACCOUNTING FEES								
SEE SUPPLEMENTAL SCHEDULE	TOTAL	\$	(A) EXPENSES PER BOOKS 16,650.	IN — \$	(B) NET VESTMENT INCOME 4,150. 4,150.	(C) ADJUSTED NET INCOME		(D) ARITABLE URPOSES 12,500. 12,500.
STATEMENT 2 FORM 990-PF, PART I, LINE 18 TAXES								
FEDERAL EXCISE TAX ON INVEST FOREIGN TAX PAID ON INVEST I		\$	(A) EXPENSES PER BOOKS 159. 300.	IN	(B) NET VESTMENT INCOME 300.	(C) ADJUSTED NET INCOME		(D) ARITABLE URPOSES
OREGON CORPORATE LICENSE OREGON REVENUE FEE/FUND BALA			50. 235. 744.	\$	300.		\$ - <u>\$</u>	50. 235. 285.
STATEMENT 3 FORM 990-PF, PART I, LINE 23 OTHER EXPENSES								
		_	(A) EXPENSES PER_BOOKS		(B) NET VESTMENT INCOME	(C) ADJUSTED NET INCOME	CF	(D) HARITABLE PURPOSES
FIDUCIARY FEES INTEREST EXPENSE INVESTMENT EXPENSES INVESTMENT MGT FEES	•	\$	1,592. 446. 64. 20,595.	\$	1,592. 64. 20,595.		\$	446.
PENALTIES	TOTAL	\$	20. 22,717.	\$	22,251.		\$	20. 466.
STATEMENT 4 FORM 990-PF, PART II, LINE 10A INVESTMENTS - U.S. AND STATE 0	OVERN	IME				Door		MA DVIII
U.S. GOVERNMENT OBLIGATIONS					ATION CHOD	BOOK VALUE		MARKET ALUE
SEE SUPPLEMENTAL SCHEDULE			C	OST	\$	95,861. 95,861.	\$	101,406. 101,406.
					TOTAL \$	95,861.	\$	101,406.

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2009 FEDERAL	STATEMENTS		PAGE
THE LAF	RSON LEGACY		91-185986
STATEMENT 5 FORM 990-PF, PART II, LINE 10B INVESTMENTS - CORPORATE STOCKS			
CORPORATE STOCKS SEE SUPPLEMENTAL SCHEDULE	VALUATION METHOD COST	BOOK VALUE 477,350.	FAIR MARKET VALUE \$ 564,318.
	TOTAL §	477,350.	\$ 564,318.
STATEMENT 6 FORM 990-PF, PART II, LINE 10C INVESTMENTS - CORPORATE BONDS			
CORPORATE BONDS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE SUPPLEMENTAL SCHEDULE	COST STOTAL	1,129,602. 1,129,602.	\$ 1,139,294.
STATEMENT 7 FORM 990-PF, PART II, LINE 13 INVESTMENTS - OTHER			
	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
OTHER PUBLICLY TRADED SECURITIES			
SEE SUPPLEMENTAL SCHEDULE	COST \$	438,769.	\$ 473,616.
	TOTAL §	438,769.	\$ 473,616.
STATEMENT 8 FORM 990-PF, PART II, LINE 15 OTHER ASSETS			
PREPAID FEDERAL EXCISE TAX .	— <u>\$</u> TOTAL \$	BOOK VALUE 5,105. 5,105.	FAIR MARKET VALUE \$ 5,105. \$ 5,105.
STATEMENT 9 FORM 990-PF, PART II, LINE 22			
OTHER LIABILITIES			
EXPENSES REIMBURSABLE TO LEE LARSON			\$ 52,437.

TOTAL \$ 52,831.

2009

FEDERAL STATEMENTS

PAGE 3

THE LARSON LEGACY

91-1859861

STATEMENT 10 FORM 990-PF, PART XV, LINE 2A-D APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:

NAME:

LELAND E.G. LARSON

CARE OF:

STREET ADDRESS: CITY, STATE, ZIP CODE: TELEPHONE:

14404 SE KRAUSE LANE HAPPY VALLEY, OR 97086-6534 (503) 593-5674

FORM AND CONTENT:

SEE ATTACHMENTS SEE ATTACHMENTS

SUBMISSION DEADLINES: RESTRICTIONS ON AWARDS:

SEE ATTACHMENTS

THE LARSON LEGACY FORM 990-PF PART I, LINE 16

EIN 91-1859861 FYE 12-31-09

Line 16b, Accounting Fees

Provider of Services. Austen & Co., P C.

Certified Public Accountants

Nature of Services 2008 accounting and preparation of 2008 federal Form

990-PF and Oregon Form CT-12

Amount **16,650**

Value/ Ending Er Maturity Units Valuation Book Fair	c) Iding Market alue
PART II, Line 10a, Investments - U.S. Government obligations	01,406
	01,406
Federal Natl Mtg Assn Medium Term 06/30/10 100,000 Cost 95,861 1	
Part II, Line 10c, Investments - corporate bonds	
	22 525
	32,525
	78,359 27,447
	53,099
	75,856
	77,267
	53,021
·	79,050
·	54,665
	26,476
	79,050
	53,760
	53,756
Nucor Corp 06/01/18 25,000 Cost 25,128	26,940
Oracle Corp 01/15/16 50,000 Cost 52,394	53,993
	30,675
·	79,120
	78,268
Wells Fargo & Co New SR NT 01/31/13 25,000 Cost 24,595	25,967
<u> 1,129,602</u> <u> 1,1</u>	39,294
Part II, Line 13, Investments - other	
Mutual Funds	
Columbia Short Interbond Fund 24,425.287 Cost 170,000 1	76,106
	19,471
•	23,377
	52,382
	39,130
	28,011
	19,703
	35,436
438,769 4	73,616

THE LARSON LEGACY		Ell	V 91-1859861
FORM 990-PF			FYE 12-31-09
PART II, Line 10b, Investments - corporate stocks			
		(b)	(c)
	Number of	Book	Fair Market
Description	Shares	Value	Value
Abbott Labs	85	4,519	4,589
ABB Ltd	325	6,441	6,207
Apple Inc	100	13,143	21,073
AT & T Inc_	160	4,445	4,485
Barclays Bank PLC ETN DJUBS GRNS37	100	4,112	4,088
Barclays Bk PLC IPSP Croil ETN	350	6,174	9,058
Baytex Energy Trust Unit	165	4,254	4,669
BHP Billiton Limited ADR	55	4,253	4,212
Central FD CDA Ltd Cl A	300	3,899	4,134
Chevron Corporation	75	4,825	5,774
Cisco Sys Inc	325	7,032	7,780
Cognizant Tech Solutions	175	6,308	7,933
Du Pont El De Nemours & Co	135	4,405	4,545
Enerplus Resources Fund	325	7,540	7,462
ETF First Tr ISE Rev Nat Gas	450	6,274	7,915
Expeditors Intl Wash Inc	225	7,616	7,823
Freeport-McMoran Copper	140	6,941	11,241
General Electric Capital	500	11,474	11,750
General Electric Co	275	4,331	4,161
Global Agribusiness ETF Tr	100	3,643	4,379
Goldman Sachs Group Inc	75	9,401	12,663
Goldman Sachs Grp Pfd	425	10,650	10,727
Google Incorporated	30	11,811	18,599
International Business Machines	50	6,496	6,545
Ishares Australia Index Fund	300	6,283	6,852
Ishares GS Semiconductor	150	6,124	7,385
Ishares Inc MSCI CDA Index	175	3,717	4,608
Ishares MSCI Brazil Index Fd	100	4,946	7,461
Ishares Tr MSCI All Country Asia Ex Japan	150	8,148	8,357
Ishares Trust MSCI Emerging	335	10,559	13,903
JPMorgan Chase Pfd Ser J	375	10,093	10,590
Lazard Emerging Markets	447.227	7,500	8,055
Lazard Ltd Shs A	200	7,740	7,594
Lowes Companies	325	6,539	7,602
Market Vectors ETF Tr Brazl SMCP ETF	200	7,121	9,882
Matthews Asian Growth & Income Fund	499.667	7,500	7,880
Merck & Co Inc New Com	150	4,655	5,481
Monsanto Co	55	4,474	4,496
Morgan Stanley Co	325	10,255	9,620
MSCI Taiwan Index Fd	300	3,201	3,891
National Oilwell Inc	350	11,656	15,432
New York Community Bancorp	325	4,147	4,716
Nice Sys Ltd Spons ADR	250	5,801	7,760
Oracle Corp	225	4,331	5,519

59861 31-09 31-09 5,496 5,496 5,164 3,006 5,048 0,476 3,878 3,442
5,496 0,850 5,164 3,006 6,048 0,476 3,878
5,496 0,850 5,164 3,006 6,048 0,476 3,878
5,496 0,850 5,164 3,006 6,048 0,476 3,878
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0,476 3,878
3,878
3,878
1,371
1,452
5,265
3,018
5,270
3,827
7,981
2,420
5,248
1,394
5,816
0
1,318

THE LARSON LEGACY		IN 91-1859861
FORM 990-PF		FYE 12-31-09
PART XV, Line 3a	· · · · · · · · · · · · · · · · · · ·	
Supplementary Information, Grants Paid Du	ring the Year	ļ
Recipient	Purpose	Amount
UNITED STATES PUBLIC CHARITIES		
Charitable		
Bouand Dance Company	Funding for organization's 2009 Oregon Public Broadcasting project	5,000
Portland, OR		
Calacırya Foundation	Funding for the organization's Planetary Medicine projects in	12,000
Half Moon Bay, CA	Guatemala	12,000
Calacirya Foundation	Funding for the organization's Pura Vida projects in Guatemala	12,000
Half Moon Bay, CA		ļ
California-Community Partners for Youth	Funding for the organization's Step-Up to Brighter Futures and	10,000
San Jose, CA	other mentoring programs	.5,550
City Repair Project	General funding for the organization's efforts to develop a more	5,000
Portland, OR	community-oriented and ecologically sustainable society	
Clackamas High School	Funding for the school's annual Winter Rage acitivity to help less	500
Clackamas, OR	fortunate families in the local community	300
Old National Control		1
Clackamas Service Center	General funding for the organization's programs providing assistance	1,000
Clackamas, OR	to the poor, needy and homeless of Clackamas County	<u> </u>
Common Cause Oregon	Funding for the Common Cause Education Fund	15,000
Portland, OR	Turiding for the common education fund	10,000
Dress for Success Oregon	General funding for the organization's activities providing career	7,500
Portland, OR	development and job retention resources to low-income women seeking employment in the Portland metropolitan area	<u> </u>
	women seeking employment in the Portiano metropolitan area	
Grace & Joy Scholarship Fund	Funding for the organization's 2009 Camp Winnarainbow summer	10,697
Berkeley, CA	camp programs (total includes direct costs of \$697)	
Grass Roots Events, Inc	Funding for the organization's Mayan Music Education program,	30,996
San Diego, CA	beekeeping program, Larson Sports and Community Center, Fairer Trade Marketing Education program, diabetes testing and	<u> </u>
	general support of Schools for Chiapas (total includes direct	
	costs of \$996)	
Illahee Society	Funding for the organization's Illahee Lecture Series providing	4,000
Portland, OR	a forum for science-based policy-relevant environmental inquiry	
JOIN	Funding for the organization's programs to help homeless individuals	10,000
Portland, OR	and families in the Portland, Oregon Metro area to transition out of	
	homelessness into permanent housing	
Novebborhood House	Funding for the organization's biovals program	250
Neighborhood House Portland, OR	Funding for the organization's bicycle program	250
i ordana, on		
Oregon Food Bank	General funding for the organization's emergency food assistance	750
Portland, OR	programs to the local community	
	1	II .

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THE LARSON LEGACY FORM 990-PF	 	N 91-185986 YE 12-31-0
PART XV, Line 3a		12 12-01-0
Supplementary Information, Grants Paid Durin	g the Year (Continued)	
Recipient	<u>Purpose</u>	Amount
Charitable (Continued)		
Portland Rescue Mission	General funding for the organization's temporary assistance to the	50
Portland, OR	homeless population of inner city Portland, Oregon	
PovertyBridge	Funding for sponsorship of the 2009 PovertyBridge Opportunity	5,00
Portland, OR	Conference	
RSF Social Finance	Funding for the organization's Gift Economy Fund for support of	2,50
San Francisco, CA	Charity Focus	2,50
SEVA Foundation	Funding for the organization's Native American programs	20,00
Berkeley, CA	Tuliding for the organization's reduce American programs	20,00
Sisters of the Road	General funding for the organization's outreach to the local	6,000
Portland, OR	community to help alleviate the systemic causes of poverty	
	and homelessness	
Street Roots	General funding for non-profit grassroots newspaper assisting	10,00
Portland, OR	people experiencing homelessness and poverty by creating	
	flexible income opportunities	
Total Charitable		168,69
Educational		
Cannon Beach Arts Association	General funding for organization supporting, funding and enhancing	50
Cannon Beach, OR	the arts and artists in the local area through education, events	
	and exhibits	<u>-</u>
Committee of 100 for Tibet	Funding for the documentary project 50 Years in Excile The	23,00
San Francisco, CA	Tibetan Refugee Story .	
Drepung Loseling Monastery	General funding for the organization	50
Atlanta, GA		
Drepung Loseling Education Fund	Funding for the organization's Education Fund	50
Atlanta, GA		
Ecumenical Ministries of Oregon	Funding for sponsorship of the 2009 Collins Lecture	1,00
Portland, OR		
Farmworker Housing Development Corporation	Funding for a preschool in Woodburn for children of local farmworkers	7,00
Woodburn, OR		
Institute for Justice & Democracy in Haiti	General funding for organization providing human rights and legal	12,00
Joseph, OR	advocacy assistance to the poor in Haiti	
International Campaign for Tibet	Funding for the organization's efforts to promote human rights and	50
Washington, DC	self-determination for Tibetans and protection of their culture	
	environment including issues relating to the Dalai Lama	
International Documentary Association	Funding for the Doorways to Dignity film project	8,00
Los Angeles, CA		

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THE LARSON LEGACY FORM 990-PF		FYE 12-31-09
PART XV, Line 3a		
Supplementary Information, Grants Paid Dur	ing the Year (Continued)	
Recipient	Purpose	Amount
Educational (Continued)		<u></u>
Living Archives	Funding for the Saint Misbehavin' film project	8,000
New York, NY		
New Directions Education Project	Funding for 2010 winter term class of 15 inmate students at the	5,100
Pendleton, OR	Eastern Oregon Correctional Institution in Pendleton, Oregon	
Permacultura America Latina	Funding for the Institute of MesoAmerican Permaculture's (IMAP)	2,000
Santa Fe, NM	seed bank project in Guatemala	
Puget Sound Network for Compassionate	Funding for sponsorship of the organiztion's 2009 Family Camp	3,500
Communication	5 3 3 4 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	3,000
Vashon Island, WA		
Rokpa USA	Funding to support Rokpa Canada's Tibetan Medical Clinic projects	3,500
Alexandria, VA	J. T.	
Sapling Foundation	Funding for various TED conferences	12,750
New York, NY	Tallang for Various 725 sometimes	12,700
The Tibet Fund	Funding to support the organization's work on behalf of Tibetan	500
New York, NY	refugees in India, Nepal, Bhutan and Tibet	500
Under the Baobab Tree Washington, DC	Funding for the organization's Project Muso Ladamunen program	25,000
United for a Fair Economy	Funding for organization's Responsible Wealth project	500
Boston, MA		
Wholistic Peace Institute	Funding for general support of the organization and to further	6,348
Portland, OR	development of its K-12 Peace Education program	
	(total includes direct costs of \$348)	
Total Educational		120,198
Total United States Public Charities		288,891
FOREIGN PUBLIC CHARITIES		
<u>Charitable</u>		
Bees Abroad UK Ltd	Funding for the organization's beekeeping projects, requests for	3,500
Letchworth, Herts, UK	project funding and technical beekeeping assistance to help alleviate poverty in developing countries	
	alleviate poverty in developing countries	
Yirtrak Foundation	Funding for the organization's 12-day permaculture course presented	13,000
Chiapas, Mexico	ın Chiapas, Mexico	
Total Foreign Public Charities		16,500
Total All Grants Paid During the	Year	305,391

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We can do no
great things...
only small things
with great love.
–Mother Teresa

The Larson Legacy Funding Guidelines

- 1) Our foundation wants to help groups sharing our interest in building a more caring, humane, peaceful planet. We favor progressive causes and groups that are relatively small and grassroots in nature—that are addressing "root" causes in their area of focus. Up to 10% of our funding may go to charitable organizations
- 2) Prior to making a grant application, please send us an introductory letter with a full description of your organization and the project you have in mind. We will respond within 60 days indicating whether or not you should proceed with a complete application. Charitable organizations with requests do not need to fill out the complete application. We will respond to you if we need any more information than was initially sent to us.
- 3) All grant applications must utilize the National Network of Grantmakers common grant application forms (double-sided is fine) Please send six complete copies to our address and you will have our response within five months time, as we fund on a year-round basis. No phone calls please
- 4) Our geographic emphasis is Oregon, Washington, California and Rhode Island. A small number of qualifying international applications (using a U.S. "pass-through" 501(c)(3) organization) may be considered.
- 5) Our range of grants is from \$1,000 to \$10,000, with our average around \$3,500 Multi-year grants will be considered only after a group has first qualified and received funding for an initial year.
- 6) We generally follow the "5-50" rule, rarely funding groups where our support is less than 5% or more than 50% of their annual budget.
- 7) Annual follow-up reports are requested for two years following a grant so we might evaluate our effectiveness
- 8) Please mail all information to.

The Larson Legacy 14404 SE Krause Lane Happy Valley, OR 97086-6534

Thank you for complying with these guidelines. We admire and respect the wonderful work that organizations like yours are doing for others.

The Larson Legacy 14404 SE Krause Lane, Happy Valley, OR 97086-6534

I. Cover Sheet (Please use this format to create a one-page cover sheet.)

Organization name:

Tax exempt status.

Year organization was founded:

Date of application:

Address.

Telephone number

Fax number:

Director:

Contact person and title (if not Director):

Grant request: \$

Penod grant will cover

Type of request (general support, start-up, technical assistance, etc.)

Project title (if project funding is requested)

Total project budget (if request is for other than general support)

Total organizational budget (current year):

Starting date of fiscal year

Summarize the organization's mission (2–3 sentences)

Summary of project or grant request (2-3 sentences).

II. Narrative (maximum of 5 pages)

- A. Introduction and Background of Organization (incorporating the following points)
 - 1 Briefly describe your organization's history and major accomplishments.
 - 2. Describe your current programs and activities.
 - Who is your constituency (be specific about demographics such as race, class, gender, ethnicity, age, sexual orientation, and people with disabilities)? How are they actively involved in your work and how do they benefit from this program and/or your organization?
 - 4. If you are a grassroots group, describe your community If you are a state, regional, or national organization, describe your work with local groups, if applicable, and how other regional and/or national organizations are involved

B. Describe Your Request (incorporating the following points)

- 1 Problem statement: what problems, needs, or issues does it address?
- 2 If other than general operating support, describe the program for which you seek funding, why you decided to pursue this project and whether it is a new or ongoing part of your organization.
- 3. What are the goals, objectives and activities/strategies involved in this request? Describe your specific activities/strategies using a timeline over the course of this request.
- 4 How does your work promote diversity and address inequality, oppression, and discrimination within your organization as well as the larger society?
- 5 Describe systemic or social change you are trying to achieve. How does your work address and change the underlying or root causes of the problem?

The Larson Legacy is a member of the National Network of Grantmakers (NNG). To save you time and effort in the grant application process, the NNG has developed this common application form. NNG is an organization of grantmakers committed to social justice and philanthropic reform. The common application format is one way of moving toward our mission.

III. ATTACHMENTS/REQUIREMENTS

A. Evaluation

1 Briefly describe your plan for evaluating the success of the project or for your organization's work What questions will be addressed? Who will be involved in evaluating this work—staff, board, constituents, community, consultants? How will the evaluation results be used?

B. Organizational Structure/Administration

- 1 Briefly describe how your organization works: What are the responsibilities of board, staff, volunteers, and if membership organization, define criteria for membership. Are there dues?
- Who will be involved in carrying out the plans outlined in this request? Include a brief paragraph summarizing the qualifications of key individuals involved.
- 3 Provide a list of your board of directors with related demographic information
- 4. How is the board selected, who selects them, and how often?
- 5 Organizational chart showing decision-making structure

C. Finances

- 1 Most recent completed full year organizational financial statement (expenses, revenue and balance sheet) audited, if available
- 2 Organization's current annual operating budget (See attached budget format)
- 3 Current project budget, if other than general support (See attached format)
- 4 Projected operating budget for upcoming year (See attached format)
- 5 List individually other funding sources for this request. Include amounts and whether received, committed, or projected/pending
- 6 Describe your plans for future fund raising
- 7 A copy of your IRS 501(c)(3) letter. If you do not have 501(c)(3) status, you must have a fiscal sponsor that does have such status and is willing to exercise expenditure responsibility.

8	Other.	 		 	 	
	_		_			

D. Other Supporting Material

- 1 Letters of support/commitment (Up to three)
- 2. Recent newsletter, articles, newspaper clippings, evaluations, or reviews (Up to three)
- 3 Recent annual report
- 4 Videos/cassettes are accepted

	Other		
~ 1	ITDer		

Guidelines for Applicants:

Send 6 complete copies: Cover sheet, maximum five page proposal, and attachments that are checked off. Use a standard typeface no smaller than 10 picas and no less than .25 in margins.

Proposals by fax are not accepted.

Binders or folders are accepted.

Your proposal may be printed single or double sided on the paper of your choice No aceptamos solicitudes en español. No, we do not accept proposals in Spanish, unless it presents a financial hardship to your organization.

The Larson Legacy 14404 SE Krause Lane, Happy Valley, OR 97086-6534

IV. Budget

If you already prepare organizational and project budgets that approximate this format, please feel free to submit them in their original forms. You may reproduce this form on your computer, and/or submit separate pages for income and expenses.

Budget for the per	iod	to	·	
EXPENSES:			INCOME:	
<u>ITEM</u>		AMOUNT	<u>SOURCE</u>	<u>AMOUNT</u>
	•	Position FT/PT	Government Grants & Contracts (Specify)	\$
Salanes & wages (Breakdown by individual position	S		Foundations (Specify)	\$
and indicate full or part time)				
			Corporations	\$
			Religious Institutions	S
Fringe benefits & payroll taxes	\$		United Way, Combined Federal Campaign & other federated campaigns	\$
Consultants & professional fees	\$		Individual contributions	3
Travel	\$		Fundraising events & products	\$
Equipment	\$		Membership income	\$
Supplies	\$		In-kınd support	\$
Training	S		Other (Earned income,	
Printing & copying	\$		consulting fees, etc Please specify)	\$
Telephone & fax	s			
Postage & delivery	5			·
Rent & utilities	S			
In-kınd expense	\$			
Other (Specify)	\$			
				
TOTAL EXPENSE	\$		TOTAL INCOME	\$
			BALANCE	\$

The Larson Legacy is a member of the National Network of Grantmakers (NNG). To save you time and effort in the grant application process, the *NNG* has developed this common application form. *NNG* is an organization of grantmakers committed to social justice and philanthropic reform. The common application format is one way of moving toward our mission.

AFFIDAVIT OF FOREIGN GRANTEE

Instructions: Complete the following and attach any requested supporting materials. An English translation must be provided for any supporting documents not written in English. The affidavit must be signed by a principal officer of the grantee organization, and his or her signature must be notarized.

The undersigned, to assist grantmaking foundation	
America determine whether	(the grantee organization)
s the equivalent of a "public charity" described in section 509((a)(1) of the United States Internal
Revenue Code or a private operating foundation described in snakes the following statement:	ection 4942(j)(3) of the Code,
(1) I am the	
(2) The grantee organization was created by _	
	r, or other document] in[year],
and is operated exclusively for	
☐ charitable	
☐ religious	
□ scientific	
☐ literary	
☐ educational	
☐ fostering national or international amateur sp	ports competition, or
☐ prevention of cruelty to children or animals	
ourposes under the laws of [the count in the count	try in which the grantee organization was formed].
(3) The activities of the grantee organization h	nave included [describe past and current
nd will include [describe future activities and operations]	
(4) Copies of the charter, bylaws, and other dorantee organization is governed are attached.	ocuments pursuant to which the
(5) The laws and customs applicable to the grany of its income or assets to be distributed to, or applied for the on-charitable organization other than pursuant to the conduct charitable activities, or as payment of reasonable compensation ayment representing the fair market value of property which the	ne benefit of, a private person or of the grantee organization's of for services rendered or as

(6) The grantee organization has no shareholders or members who have a propriety or profit-making interest in the income or assets of the organization.

purchased.

(7) In the event that the grantee organization were to be liquidated or dissolved, under the laws and customs applicable, or under the governing instruments, all its assets would be distributed to another not-for-profit organization for charitable, religious, scientific, literary, or educational purposes, or to a government instrumentality. A copy of the relevant statutory law or provisions in the governing instruments controlling the distribution of the organization's assets on liquidation is attached.

(8) The laws and customs applied the organization (other than as an insubstantial pare not for religious, charitable, scientific, literary influence legislation, by propaganda or otherwise	y, or educational purposes, or to attempt to
(9) The laws and customs applithe organization directly or indirectly to particip behalf of, or in opposition to, any candidate for participates of the control of the custom of the cus	
(10) The grantee organization is any organization other than as follows:	not controlled by or operated in connection with
(11) The grantee organization is	the equivalent of a "public charity" because it is
☐ A church or convention or ass	sociation of churches
described in section 170(b)(1)(A)(ii) of the adopted and operates pursuant to a racial	
☐ An organization whose prima research	ry purpose is medical care, education or
☐ An endowment fund for a pub	olic college or university
☐ An organization that normally support from governmental units, contrib combination of these sources – complete if necessary)	<u> </u>
	[NAME OF ORGANIZATION]
	Ву
	Name:
	Title:
I,	[Name], being first duly sworn, depose itle] of[Name of Grantee it and know the contents thereof, and that the
SUBSCRIBED and sworn to before	re me this, day of,
(affix seal here)	Notary Public for My commission expires:

PDXDOCS 1055210 1

Schedule A

Schedule of Public Support for Four Most Recent Tax Years

[To be completed only if grantee organization is claiming public charity status because it receives at least one-third of its support from public sources. See number 11.]

Instructions: Provide the following information for the four most recently completed taxable years.

t be equal to or greater than 33.33% to qualify under this category

Form **886**8 (Rev April 2009)

Application for Extension of Time To File an Exempt Organization Return

Department of the Treasury

File a separate application for each return.

OMB No 1545-1709

internal Revenue	Service	The a separate application for each retain.				
If you are	filing for an Automatic 3-Month	Extension, complete only Part I and check this box			. ► X	
If you are	filing for an Additional (Not Aut	omatic) 3-Month Extension, complete only Part II (on pa	age 2 of the	ıs form)		
•	•	dy been granted an automatic 3-month extension on a r	-	•		
Part I/	Automatic 3-Month Extens	ion of Time. Only submit original (no copies r	needed).			
A corporation	required to file Form 990-T and	requesting an automatic 6-month extension — check this	s box and o	complete Part I onl	y ► 🗍	
All other corp		, partnerships, REMICS, and trusts must use Form 7004	to request	t an extension of ti	me to file	
Electronic Fi returns noted the additiona Form 990-T	ling (e-file). Generally, you can e	lectronically file Form 8868 if you want a 3-month autom on required to file Form 990-T). However, you cannot file ion or (2) you file Forms 990-BL, 6069, or 8870, group re y completed and signed page 2 (Part II) of Form 8868. F e-file for Charities & Nonprofits	atic extens Form 886 eturns, or a or more de	sion of time to file on the selectronically if (see a composite or conseitalls on the electronicalls).	one of the 1) you want solidated onic filing of	
····	Name of Exempt Organization			Employer identification	number	
Type or						
print	THE LARSON LEGACY			91-1859861		
File by the	Number, street, and room or suite number	If a P O box, see instructions				
due date for filing your return See	14404 SE KRAUSE LANE					
return See instructions	City, town or post office, state, and ZIP cod			 		
	HAPPY VALLEY, OR 970	86-6534				
Check type o	of return to be filed (file a separa		· · · · · · · · · · · · · · · · · · ·			
Form 990	· -	Form 990-T (corporation)	Form 472	20		
Form 990	-	Form 990-T (section 401(a) or 408(a) trust)	Form 522			
Form 990	-	Form 990-T (trust other than above)	Form 606			
X Form 990	L-	Form 1041-A	Form 887			
If the org. If this is f check this the exten I reques until The ext X X	for a Group Return, enter the organish box If it is for part of the sion will cover stan automatic 3-month (6 month 8/15 , 20 10 , to file ension is for the organization's recalled a great of the organization of the called a great of the organization of the called a great of the organization of the orga	, 20, and ending, 20	If the names and on of time led above		nbers	
		0-PF, 990-T, 4720, or 6069, enter the tentative tax, less		Thange in accounting		
nonrefu	indable credits. See instructions			3a \$	400.	
	pplication is for Form 990-PF or nclude any prior year overpayme	990-T, enter any refundable credits and estimated tax paint allowed as a credit	ayments	3ь \$	0.	
deposit	e Due. Subtract line 3b from line with FTD coupon or, if required, tructions.	3a Include your payment with this form, or, if required, by using EFTPS (Electronic Federal Tax Payment Syste	m).	3c \$	400.	
Caution. If yo payment inst		ic fund withdrawal with this Form 8868, see Form 8453-E	EO and For	rm 8879-EO for		
BAA For Pri	vacy Act and Paperwork Reducti	on Act Notice, see instructions.		Form 8868 ((Rev 4-2009)	

Form 8868	(Rev 4-2009)				Page Z
• If you a	ire filing for an Additional (Not Automatic) 3-Month Extension, complete only Pa	rt II and check t	his box		<u>► X</u>
	complete Part II if you have already been granted an automatic 3-month extension			n 8868	_
-	re 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	(по соріе	s needed).
<u> </u>	Name of Exempt Organization		Employer iden	tification num	ber
T		Í			
Type or print	THE LARSON LEGACY	,	91-1859861		
F	Number, street, and room or suite number. If a P.O. box, see instructions		For IRS use or	ly	-
File by the extended	AUSTEN & CO., P.C., CPA'S	, ,			
due date for	13800 SE WEBSTER ROAD	,	c		r
return See instructions	City, town or post office, state, and ZIP code For a foreign address, see instructions	,	•		•
mod dollaria	MILWAUKIE, OR 97267				
Check type	e of return to be filed (File a separate application for each return)				
Form 9		Form 1041-A		Form	1 6069
Form 9		Form 4720		\vdash	1 8870
Form 9		Form 5227		L	
	not complete Part II if you were not already granted an automatic 3-month exten		ously filed I	Orm 8868	
	oks are in care of LELAND E.G. LARSON	sion on a picer	Justy micu i	07111 00001	
	one No ► 503-658-4250 FAX No. ►				
•	rganization does not have an office or place of business in the United States, che				▶ [7]
	rganization does not have an office of place of business in the office States, the series for a Group Return, enter the organization's four digit Group Exemption Number			If th	nis is for the
		attach a list wi	th the name		
•		allacii a iist wi	in the name	S allu Elivs	, or an
	he extension is for				
	uest an additional 3-month extension of time until $11/15$, 20 10 .	and anding		20	
	alendar year 2009, or other tax year beginning, 20			, 20	
			Change		
	in detail why you need the extension ADDITIONAL TIME IS NEEDE	TO TO WOSE	MOTE IUI	- NECE2	SAKI
TNE	ORMATION TO FILE A COMPLETE AND ACCURATE RETURN.	- 			
			1		
	application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative	tax, less any	8a	ė	400.
	sfundable credits. See instructions			<u>Y</u>	400.
b It this	s application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credi ients made. Include any prior year overpayment allowed as a credit and any amoi	is and estimate unt paid previou	u tax slv		
with F	Form 8868 .		8b	\$	400.
c Balan	nce Due. Subtract line 8b from line 8a. Include your payment with this form, or, if	required, depos	at		_
with F	TD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment Sys	tem) See instr	8c	\$	0.
	Signature and Verification				
Under penalties correct, and co	s of perjury, I declare that I have examined this form, including accompanying schedules and statements, and implete, and that I am authorized to prepare this form	d to the best of my kr	owledge and b	elief, it is true,	
Signature -	Title ►		Da	ite ►	
. 5				· · · · · · · · · · · · · · · · · · ·	
BAA	FIFZ0502L 03/11/09			Form 8868	(Rev 4-2009)