Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning , 2009, and ending , 20

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: THE CHESTERMAN FAMILY FOUNDATION

A Employer identification number: 91-2086157

Number and street (or P O box number if mail is not delivered to street address): 4700 SOUTH LEWIS BOULEVARD
P. O. BOX 3657

Room/suite

B Telephone number (see page 10 of the instructions): EXT 3125 (712) 252-2653

City or town, state, and ZIP code: SIOUX CITY, IA 51102

C If exemption application is pending, check here ▶ [ ]
D 1. Foreign organizations, check here ▶ [ ]
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ [ ]

H Check type of organization: [X] Section 501(c)(3) exempt private foundation
[ ] Section 4947(a)(1) nonexempt charitable trust [ ] Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ [ ]

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ $ 1,070,289.

J Accounting method: [X] Cash [ ] Accrual
[ ] Other (specify) ____________
(Part I, column (d) must be on cash basis.)

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) (see page 11 of the instructions).)*

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check ▶ [ ] if the foundation is **not** required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	26,737.	26,737.		ATCH 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-176,784.			
	b Gross sales price for all assets on line 6a 767,127.				
	7 Capital gain net income (from Part IV, line 2)				
	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) (attach schedule)				
	11 Other income (attach schedule)				
	12 **Total.** Add lines 1 through 11	-150,047.	26,737.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) [2]	1,530.	1,530.	0.	0.
	c Other professional fees (attach schedule) [3]	7,441.	7,441.		
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions) **	778.	240.		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) [5]	529.	529.		
	24 **Total operating and administrative expenses.** Add lines 13 through 23	10,278.	9,740.	0.	0.
	25 Contributions, gifts, grants paid	65,000.			65,000.
	26 **Total expenses and disbursements.** Add lines 24 and 25	75,278.	9,740.	0.	65,000.
	27 Subtract line 26 from line 12				
	a **Excess of revenue over expenses and disbursements**	-225,325.			
	b **Net investment income** (if negative, enter -0-)		16,997.		
	c **Adjusted net income** (if negative, enter -0-)			-0-	

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Part II Balance Sheets

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

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments	226,260.	86,966.	86,966.
	3	Accounts receivable ▶			
		Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less. allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10 a	Investments - U S and state government obligations (attach schedule) **	210,075.	114,997.	117,085.
	b	Investments - corporate stock (attach schedule) ATCH 7	836,147.	745,194.	766,238.
	c	Investments - corporate bonds (attach schedule)			
	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	12	Investments - mortgage loans			
	13	Investments - other (attach schedule) ATCH 8	0.	100,000.	100,000.
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	1,272,482.	1,047,157.	1,070,289.
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 (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)			
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. ▶ X			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	1,272,482.	1,047,157.	
	30	**Total net assets or fund balances** (see page 17 of the instructions)	1,272,482.	1,047,157.	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	1,272,482.	1,047,157.	

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	1,272,482.
2	Enter amount from Part I, line 27a	2	-225,325.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	1,047,157.
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,047,157.

**ATCH 6

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	SEE PART IV SCHEDULE			
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e				

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

	(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col. (h))
a				
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	-176,784.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8	3	

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 page 18 of the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	55,742.	1,193,500.	0.046705
2007	79,244.	1,435,619.	0.055198
2006	92,022.	1,395,377.	0.065948
2005	65,047.	1,351,912.	0.048115
2004	69,767.	1,283,795.	0.054344

2	Total of line 1, column (d)	2	0.270310
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.054062
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	967,691.
5	Multiply line 4 by line 3	5	52,315.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	170.
7	Add lines 5 and 6	7	52,485.
8	Enter qualifying distributions from Part XII, line 4	8	65,000.

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 on page 18

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 18 of the 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 ruling letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b	1	170.
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	
3	Add lines 1 and 2	3	170.
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	170.
6	Credits/Payments		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 6a: 280.		
b	Exempt foreign organizations-tax withheld at source — 6b: 0.		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 0.		
d	Backup withholding erroneously withheld — 6d:		
7	Total credits and payments. Add lines 6a through 6d	7	280.
8	Enter any **penalty** for underpayment of estimated tax. Check here [ ] if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	110.
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ 110. **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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ▶$ 0. (2) On foundation managers ▶$ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation 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.*	2		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*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		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?	6	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.*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ ____			
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*	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
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 page 20 of the 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 ▶ CY W. CHESTERMAN SR. Telephone no ▶ 712-252-2653

Located at ▶ 4700 LEWIS BLVD, SIOUX CITY, IOWA ZIP + 4 ▶ 51104

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

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)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)).			
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? ☐ Yes ☒ No If "Yes," list the years ▶ ____ , ____ , ____ , ____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect 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 page 20 of the instructions)	2b		X
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.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		X

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 [X] 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 [X] No

(3) Provide a grant to an individual for travel, study, or other similar purposes? [ ] Yes [X] No

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) [ ] Yes [X] 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 [X] 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 page 22 of the instructions)? **5b** X

Organizations relying on a current notice regarding disaster assistance check here ▶ [X]

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? [ ] Yes [X] 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 [X] No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? [ ] Yes [X] No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **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 (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
CY W. CHESTERMAN, SR. SIOUX CITY, IA	DIRECTOR- TIME AS NEEDED	0.	0.	0.
NANCY C. SMITH INDIANAPOLIS, IN	DIRECTOR- TIME AS NEEDED	0.	0.	0.
SUSAN C. BERGESON DAKOTA DUNES, SD	DIRECTOR- TIME AS NEEDED	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1 - see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances

Total number of other employees paid over $50,000 ▶ NONE

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

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation

Total number of others receiving over $50,000 for professional services . . . . . ▶ NONE

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

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 N/A	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments** (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 NONE	
2	
All other program-related investments See page 24 of the instructions. 3 NONE	
Total. Add lines 1 through 3 . . . . . ▶	

Part X **Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	849,946.
b	Average of monthly cash balances	1b	132,481.
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0.
d	**Total** (add lines 1a, b, and c)	1d	982,427.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	982,427.
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	14,736.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	967,691.
6	**Minimum investment return.** Enter 5% of line 5	6	48,385.

Part XI **Distributable Amount** (see page 25 of the 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	48,385.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	170.		
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	170.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	48,215.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	48,215.
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	48,215.

Part XII **Qualifying Distributions** (see page 25 of the 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	65,000.
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	0.
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	0.
b	Cash distribution test (attach the required schedule)	3b	0.
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	65,000.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	170.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	64,830.

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 page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				48,215.
2 Undistributed income, if any, as of the end of 2009.				
a Enter amount for 2008 only			14,254.	
b Total for prior years 20 07 ,20 06 ,20 05				
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005 — 0.				
c From 2006 — 0.				
d From 2007				
e From 2008 — 0.				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ $ 65,000.				
a Applied to 2008, but not more than line 2a			14,254.	
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)				
d Applied to 2009 distributable amount				48,215.
e Remaining amount distributed out of corpus	2,531.			
5 Excess distributions carryover applied to 2009 (*If an amount appears in column (d), the same amount must be shown in column (a).*)				
6 **Enter the net total of each column as indicated below:**				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	2,531.			
b Prior years' undistributed income Subtract line 4b from line 2b				
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				
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions				
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions				
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)				
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a	2,531.			
10 Analysis of line 9				
a Excess from 2005 — 0.				
b Excess from 2006 — 0.				
c Excess from 2007				
d Excess from 2008 — 0.				
e Excess from 2009 — 2,531.				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9) NOT APPLICABLE

1a 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			
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
2a 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 page 28 of 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).)

CY W. CHESTERMAN

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.

N/A

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ▶ [X] if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc. (see page 28 of the 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 XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
ATTACHMENT 9				
Total . . . . ▶ **3a**				65,000.
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue.					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	26,737.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	-176,784.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				-150,047.	

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 -150,047.

(See worksheet in line 13 instructions on page 28 to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See page 29 of the instructions.)
4	THE INCOME EARNED ON THE FOUNDATION'S ASSETS WILL BE USED AS
	CONTRIBUTIONS TO FURTHER SERVE EDUCATIONAL, CHARITABLE,
	CULTURAL AND RELIGIOUS PURPOSES; SPECIFICALLY GIVEN TO
	QUALIFYING PUBLIC CHARITIES UNDER SECTION 501(C)(3).
8	SAME AS LINE 4

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

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?

		Yes	No
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.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
	N/A		N/A

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

Sign Here

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

Signature of officer or trustee   Date 4-26-10   Title Chairman

Paid Preparer's Use Only

Preparer's signature RONALD K. JESTER	Date 4/23/10	Check if self-employed ☐	Preparer's identifying number (See Signature on page 30 of the instructions) P00412759
Firm's name (or yours if self-employed), address, and ZIP code	LABENZ & ASSOCIATES LLC 4535 NORMAL BLVD., SUITE 195 LINCOLN, NE 68506		EIN 47-0814192 Phone no 402-437-8383

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
DIVIDENDS AND INTEREST		26,737.	26,737.
	TOTAL	26,737.	26,737.

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
TAX PREPARATION FEES	1,530.	1,530.		
TOTALS	1,530.	1,530.	0.	0.

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FIDUCIARY FEES	7,441.	7,441.
TOTALS	7,441.	7,441.

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
INCOME TAXES	538.	0.
FOREIGN TAXES PAID	240.	240.
TOTALS	778.	240.

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
INVESTMENT EXPENSES	529.	529.
TOTALS	529.	529.

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

ATTACHMENT 6

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
U.S. OBLIGATIONS	114,997.	117,085.
US OBLIGATIONS TOTAL	114,997.	117,085.

FORM 990PF, PART II - CORPORATE STOCK

ATTACHMENT 7

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
COMMON STOCK	91,313.	106,354.
MUTUAL FUNDS	653,881.	659,884.
TOTALS	745,194.	766,238.

FORM 990PF, PART II - OTHER INVESTMENTS

ATTACHMENT 8

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
CERTIFICATES OF DEPOSIT	100,000.	100,000.
TOTALS	100,000.	100,000.

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		TOTAL CAPITAL GAIN DISTRIBUTIONS					359.	
		VARIOUS - SEE ATTACHED PROPERTY TYPE: SECURITIES				P	VARIOUS	VARIOUS
164,885.		151,715.					13,170.	
		VARIOUS - SEE ATTACHED PROPERTY TYPE: SECURITIES				P	VARIOUS	VARIOUS
87,434.		111,410.					-23,976.	
		VARIOUS - SEE ATTACHED PROPERTY TYPE: SECURITIES				P	VARIOUS	VARIOUS
514,449.		680,786.					-166,337.	
TOTAL GAIN(LOSS)							-176,784.	

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 9

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
MORNINGSIDE COLLEGE 1501 MORNINGSIDE AVE SIOUX CITY, IA 51106	NONE 501(C)(3)	TO FURTHER PROGRAMS OF THE ORGANIZATION	10,000
GIRLS CLUB OF SIOUX CITY - (GIRLS INC) 723 MYRTLE STREET SIOUX CITY, IA 51103	NONE 501(C)(3)	TO FURTHER PROGRAMS OF THE ORGANIZATION	10,000
BRIAR CLIFF UNIVERSITY 3303 REBECCA STREET SIOUX CITY, IA 51104	NONE 501(C)(3)	TO FURTHER PROGRAMS OF THE ORGANIZATION	5,000
WIT FOUNDATION INC 4780 ASHFORD DUNWOODY RD STE A ATLANTA, GA 30338	NONE 501(C)(3)	TO FURTHER PROGRAMS OF THE ORGANIZATION	5,000.
SIOUX CITY GOSPEL MISSION P O. BOX 3745 SIOUX CITY, IA 51102	NONE 501(C)(3)	TO FURTHER PROGRAMS OF THE ORGANIZATION	10,000
JACKSON RECOVERY CENTERS INC 800 FIFTH STREET, SUITE 200 SIOUX CITY, IA 51101	NONE 501(C)(3)	TO FURTHER PROGRAMS OF THE ORGANIZATION	10,000
SIOUXLAND HERITAGE FOUNDATION 2901 JACKSON STREET SIOUX CITY, IA 51104	NONE 501(C)(3)	TO FURTHER PROGRAMS OF THE ORGANIZATION	10,000
BOYS CLUB OF SIOUX CITY INC 823 PEARL ST SIOUX CITY, IA 51101	NONE 501(C)(3)	TO FURTHER PROGRAMS OF THE ORGANIZATION	5,000.
		TOTAL CONTRIBUTIONS PAID	65,000

SCHEDULE D
(Form 1041)

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

▶ **Attach to Form 1041, Form 5227, or Form 990-T. See the instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).**

OMB No 1545-0092

2009

Name of estate or trust	Employer identification number
THE CHESTERMAN FAMILY FOUNDATION	91-2086157

Note: *Form 5227 filers need to complete only Parts I and II.*

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a					
ATTACHMENT 10			164,885.	151,715.	13,170.

b	Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b	1b	
2	Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824	2	
3	Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts	3	
4	Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2008 Capital Loss Carryover Worksheet	4	( )
5	**Net short-term gain or (loss).** Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back ▶	5	13,170.

Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo , day, yr)	(c) Date sold (mo , day, yr)	(d) Sales price	(e) Cost or other basis (see page 4 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a					
ATTACHMENT 11			601,883.	792,196.	-190,313.

b	Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b	6b	
7	Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824	7	
8	Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts	8	
9	Capital gain distributions	9	359.
10	Gain from Form 4797, Part I	10	
11	Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2008 Capital Loss Carryover Worksheet	11	( )
12	**Net long-term gain or (loss).** Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back ▶	12	-189,954.

Part III **Summary of Parts I and II**
Caution: *Read the instructions **before** completing this part.*

			(1) Beneficiaries' (see page 5)	(2) Estate's or trust's	(3) Total
13	**Net short-term gain or (loss)**	13			13,170.
14	**Net long-term gain or (loss):**				
a	Total for year	14a			-189,954.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht.)	14b			
c	28% rate gain	14c			
15	**Total net gain or (loss).** Combine lines 13 and 14a ▶	15			-176,784.

Note: *If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a) If lines 14a and 15, column (2), are net gains, go to Part V, and **do not** complete Part IV If line 15, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet,** as necessary*

Part IV **Capital Loss Limitation**

16 Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the **smaller** of:
a The loss on line 15, column (3) **or** b $3,000 . . . 16 (3,000.)

Note: *If the loss on line 15, column (3), is more than $3,000, **or** if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** on page 7 of the instructions to figure your capital loss carryover.*

Part V **Tax Computation Using Maximum Capital Gains Rates**

Form 1041 filers. Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), **and** Form 1041, line 22, is more than zero.

Caution: *Skip this part and complete the worksheet on page 8 of the instructions if:*

- *Either line 14b, col. (2) or line 14c, col (2) is more than zero, or*
- *Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.*

Form 990-T trusts. Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, **and** Form 990-T, line 34, is more than zero Skip this part and complete the worksheet on page 8 of the instructions if either line 14b, col (2) or line 14c, col. (2) is more than zero.

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34)		17		
18	Enter the **smaller** of line 14a or 15 in column (2) but not less than zero	18			
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	19			
20	Add lines 18 and 19	20			
21	If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0- ▶	21			
22	Subtract line 21 from line 20. If zero or less, enter -0-		22		
23	Subtract line 22 from line 17. If zero or less, enter -0-		23		
24	Enter the **smaller** of the amount on line 17 or $2,300		24		
25	Is the amount on line 23 equal to or more than the amount on line 24? ☐ **Yes.** Skip lines 25 and 26; go to line 27 and check the "No" box. ☐ **No.** Enter the amount from line 23		25		
26	Subtract line 25 from line 24		26		
27	Are the amounts on lines 22 and 26 the same? ☐ **Yes.** Skip lines 27 thru 30, go to line 31 ☐ **No.** Enter the smaller of line 17 or line 22		27		
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)		28		
29	Subtract line 28 from line 27		29		
30	Multiply line 29 by 15% (.15)			30	
31	Figure the tax on the amount on line 23. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)			31	
32	Add lines 30 and 31			32	
33	Figure the tax on the amount on line 17. Use the 2009 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)			33	
34	**Tax on all taxable income.** Enter the **smaller** of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)			34	

Schedule D Detail of Short-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Short-term Gain/Loss
CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES					
VARIOUS - SEE ATTACHED	VARIOUS	VARIOUS	164,885.	151,715.	13,170.
TOTAL CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES			164,885.	151,715.	13,170.
Totals			164,885.	151,715.	13,170.

JSA
9F0971 2 000

Schedule D Detail of Long-term Capital Gains and Losses

ATTACHMENT 11

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES					
TOTAL CAPITAL GAINS (LOSSES) HELD FOR INVESTMENT PURPOSES					
			601,883.	792,196.	-190,313.
VARIOUS - SEE ATTACHED	VARIOUS	VARIOUS	87,434.	111,410.	-23,976.
VARIOUS - SEE ATTACHED	VARIOUS	VARIOUS	514,449.	680,786.	-166,337.
Totals			601,883.	792,196.	-190,313.

JSA
9F0970 2 000

2009 Tax Information Statement

Account Number: 4-07281-00
Recipient's Tax ID number: 91-2086157
Payer's Federal ID number: 42-0943319
Questions? (712)277-6586

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address
CHESTERMAN FAMILY FOUNDATION
PO BOX 3657
SIOUX CITY, IA 51102

Payer's Name and Address
THE SECURITY NATIONAL BANK OF SIOUX CITY
601 PIERCE ST
SIOUX CITY, IA 51101

2009 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
Short Term Sales Reported on 1099-B								
765.9760	091929638	BLACKROCK HIGH YIELD BD FD	04/28/2009	10/16/2009	5,132.04	4,166.91	965.13	0.00
1879.6000	315920686	FIDELITY ADV DIVERSIFIED INTL FD#734	06/11/2009	10/16/2009	28,663.90	24,603.96	4,059.94	0.00
189.3760	315805101	FIDELITY ADV EQUITY GROWTH #86	07/28/2009	10/16/2009	8,521.92	7,700.00	821 92	0 00
210.0000	315920249	FIDELITY ADVISOR EMERGING MKTS FD-I	06/11/2009	10/16/2009	4,351.20	3,500.70	850.50	0 00
1133.0000	318530268	FIRST AMERN REAL ESTATE SECS FD-Y	04/28/2009	10/16/2009	14,661.02	11,182.71	3,478.31	0.00
510.0560	38143H886	GOLDMAN SACHS EMERGING MKT DBT FD-I	06/11/2009	10/16/2009	6,033.96	5,324.98	708.98	0.00
4716.9810	693390700	PIMCO TOTAL RETURN FUND INST	08/03/2009	10/16/2009	51,462.26	50,000.00	1,462.26	0.00
213.0000	922908447	VANGUARD MID CAP INDEX SIGNAL FD	06/11/2009	10/16/2009	4,875.57	4,064.04	811.53	0.00
3820.4390	921937108	VANGUARD TOTAL BD MKT INDEX #84	10/05/2009	10/16/2009	39,808.97	40,000.00	-191 03	0 00
71.0000	961323300	WESTPORT FDS-CL I	06/11/2009	10/16/2009	1,373.85	1,171.50	202.35	0.00
Total Short Term Sales Reported on 1099-B					**164,884.69**	**151,714.80**	**13,169.89**	**0.00**
Long Term 15% Sales Reported on 1099-B								
188.0000	197199409	COLUMBIA ACORN TR FD CL Z	VARIOUS	10/16/2009	4,543.96	6,154.12	-1,610.16	0 00
732.8700	31282R4S0	FHLMC POOL #M80833 4.00000% 8/01/10	08/14/2003	10/15/2009	732.87	728.29	4.58	0.00
627.6400	31282R4S0	FHLMC POOL #M80833 4.00000% 8/01/10	08/14/2003	11/15/2009	627.64	623 72	3.92	0 00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

2009 Tax Information Statement

Account Number: 4-07281-00
Recipient's Tax ID number: 91-2086157
Payer's Federal ID number: 42-0943319
Questions? (712)277-6586

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address
CHESTERMAN FAMILY FOUNDATION
PO BOX 3657
SIOUX CITY, IA 51102

Payer's Name and Address
THE SECURITY NATIONAL BANK OF SIOUX CITY
601 PIERCE ST
SIOUX CITY, IA 51101

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
(Box 5)	*(Box 1b)*	*(Box 7)*		*(Box 1a)*	*(Box 2)*			*(Box 4)*
743.6700	31282R4S0	FHLMC POOL #M80833 4.00000% 8/01/10	08/14/2003	12/15/2009	743.67	739.02	4.65	0.00
857.2600	31282R4T8	FHLMC POOL #M80834 4.50000% 8/01/10	07/30/2003	10/15/2009	857.26	870.92	-13.66	0.00
545.5900	31282R4T8	FHLMC POOL #M80834 4.50000% 8/01/10	07/30/2003	11/15/2009	545.59	554.29	-8.70	0 00
529.9700	31282R4T8	FHLMC POOL #M80834 4.50000% 8/01/10	07/30/2003	12/15/2009	529.97	538.42	-8.45	0.00
620.7600	31282R5D2	FHLMC POOL #M80844 4.00000% 9/01/10	09/12/2003	10/15/2009	620.76	622.89	-2.13	0.00
808.0400	31282R5D2	FHLMC POOL #M80844 4.00000% 9/01/10	09/12/2003	11/15/2009	808.04	810.82	-2.78	0 00
643.0100	31282R5D2	FHLMC POOL #M80844 4.00000% 9/01/10	09/12/2003	12/15/2009	643.01	645.22	-2.21	0.00
3465.4900	31282VB38	FHLMC POOL #M90958 4.00000% 12/01/09	11/22/2004	10/15/2009	3,465.49	3,504.48	-38.99	0.00
8614.7300	31282VB38	FHLMC POOL #M90958 4.00000% 12/01/09	11/22/2004	11/15/2009	8,614.73	8,711.64	-96.91	0.00
9460.7800	31282VB38	FHLMC POOL #M90958 4.00000% 12/01/09	11/22/2004	12/15/2009	9,460.78	9,567.21	-106.43	0.00
871.4000	315920686	FIDELITY ADV DIVERSIFIED INTL FD#734	VARIOUS	10/16/2009	13,288.85	22,155.24	-8,866 39	0.00
836.9300	315805101	FIDELITY ADV EQUITY GROWTH #86	VARIOUS	10/16/2009	37,661.84	50,349.96	-12,688.12	0.00
441.2000	31371LB65	FNMA POOL #254861 4.00000% 8/01/10	07/21/2003	10/25/2009	441.20	449.20	-8.00	0 00
489.7900	31371LB65	FNMA POOL #254861 4.00000% 8/01/10	07/21/2003	11/25/2009	489.79	498.67	-8.88	0 00
418.3500	31371LB65	FNMA POOL #254861 4.00000% 8/01/10	07/21/2003	12/25/2009	418.35	425.93	-7.58	0 00
621.6900	31371LRL5	FNMA POOL #255291 4.50000% 6/01/14	11/18/2004	10/25/2009	621.69	632.96	-11.27	0 00
730.4300	31371LRL5	FNMA POOL #255291 4.50000% 6/01/14	11/18/2004	11/25/2009	730.43	743.67	-13.24	0.00
527.1800	31371LRL5	FNMA POOL #255291 4.50000% 6/01/14	11/18/2004	12/25/2009	527.18	536.73	-9.55	0 00

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2009 Tax Information Statement

Payer's Name and Address
THE SECURITY NATIONAL BANK OF SIOUX CITY
601 PIERCE ST
SIOUX CITY, IA 51101

Account Number: 4-07281-00
Recipient's Tax ID number: 91-2086157
Payer's Federal ID number: 42-0943319
Questions? (712)277-6586

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address
CHESTERMAN FAMILY FOUNDATION
PO BOX 3657
SIOUX CITY, IA 51102

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
(Box 5)	*(Box 1b)*	*(Box 7)*		*(Box 1a)*	*(Box 2)*			*(Box 4)*
53.0000	880210505	TEMPLETON FOREIGN EQUITY SERIES	05/09/2007	10/16/2009	1,060.53	1,546.54	-486.01	0.00
Total Long Term 15% Sales Reported on 1099-B					**87,433.63**	**111,409.94**	**-23,976.31**	**0.00**

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2009 Tax Information Statement

Payer's Name and Address
THE SECURITY NATIONAL BANK OF SIOUX CITY
601 PIERCE ST
SIOUX CITY, IA 51101

Account Number: 5-06103-00
Recipient's Tax ID number: 91-2086157
Payer's Federal ID number: 42-0943319
Questions? (712)277-6586

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address
CHESTERMAN FAMILY FOUNDATION
PO BOX 3657
SIOUX CITY, IA 51102

2009 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
Long Term 15% Sales Reported on 1099-B								
1447.4140	018918433	ALLIANZ NFJ LARGE CAP VAL FD-I	VARIOUS	06/11/2009	15,907.08	29,897.96	-13,990.88	0.00
1186.0630	023375108	AMCAP	VARIOUS	06/11/2009	16,545.58	20,819.81	-4,274.23	0.00
650.0000	023608102	AMEREN CORP	03/25/2003	07/27/2009	16,750.78	25,701.00	-8,950.22	0.00
1604.4890	04315J837	ARTIO INTERNATIONAL EQUITY FD II-I	VARIOUS	06/11/2009	17,216.17	27,010.49	-9,794.32	0.00
522.4490	140193103	CAPITAL INCOME BLDR FD - A	VARIOUS	06/11/2009	22,392.16	25,355.55	-2,963.39	0 00
1933.5890	36559B708	CHESAPEAKE CORE GROWTH FD	VARIOUS	06/11/2009	22,661.66	38,864.83	-16,203.17	0.00
1400.0000	205887102	CONAGRA FOODS INC	09/26/2003	07/27/2009	27,455.95	29,890.00	-2,434.05	0.00
595.0000	209115104	CONSOLIDATED EDISON INC	03/25/2003	07/27/2009	23,282.40	23,353.75	-71.35	0.00
850.0000	260543103	DOW CHEM CO	09/26/2003	07/27/2009	17,009.56	27,727.00	-10,717.44	0.00
398.8900	31282R4S0	FHLMC POOL #M80833 4.00000% 8/01/10	08/14/2003	01/15/2009	398.89	396.40	2.49	0.00
520.5100	31282R4S0	FHLMC POOL #M80833 4.00000% 8/01/10	08/14/2003	02/15/2009	520.51	517.26	3.25	0.00
792.3800	31282R4S0	FHLMC POOL #M80833 4.00000% 8/01/10	08/14/2003	03/15/2009	792.38	787.43	4.95	0.00
836.6200	31282R4S0	FHLMC POOL #M80833 4.00000% 8/01/10	08/14/2003	04/15/2009	836.62	831.39	5.23	0.00
1061.9300	31282R4S0	FHLMC POOL #M80833 4.00000% 8/01/10	08/14/2003	05/15/2009	1,061.93	1,055.29	6.64	0.00
1036.0300	31282R4S0	FHLMC POOL #M80833 4.00000% 8/01/10	08/14/2003	06/15/2009	1,036.03	1,029.55	6.48	0.00
905.4400	31282R4S0	FHLMC POOL #M80833 4.00000% 8/01/10	08/14/2003	07/15/2009	905.44	899.78	5.66	0.00

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2009 Tax Information Statement

Account Number: 5-06103-00
Recipient's Tax ID number: 91-2086157
Payer's Federal ID number: 42-0943319
Questions? (712)277-6586

☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address
CHESTERMAN FAMILY FOUNDATION
PO BOX 3657
SIOUX CITY, IA 51102

Payer's Name and Address
THE SECURITY NATIONAL BANK OF SIOUX CITY
601 PIERCE ST
SIOUX CITY, IA 51101

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
821.7200	31282R4S0	FHLMC POOL #M80833 4.00000% 8/01/10	08/14/2003	08/15/2009	821.72	816.58	5.14	0.00
639.4100	31282R4S0	FHLMC POOL #M80833 4.00000% 8/01/10	08/14/2003	09/15/2009	639.41	635.41	4 00	0 00
162.0300	31282R4T8	FHLMC POOL #M80834 4.50000% 8/01/10	07/30/2003	01/15/2009	162.03	164.61	-2.58	0.00
392.2400	31282R4T8	FHLMC POOL #M80834 4.50000% 8/01/10	07/30/2003	02/15/2009	392.24	398.49	-6.25	0.00
361.4700	31282R4T8	FHLMC POOL #M80834 4.50000% 8/01/10	07/30/2003	03/15/2009	361.47	367.23	-5.76	0.00
711.8400	31282R4T8	FHLMC POOL #M80834 4.50000% 8/01/10	07/30/2003	04/15/2009	711.84	723.19	-11.35	0.00
534.1300	31282R4T8	FHLMC POOL #M80834 4.50000% 8/01/10	07/30/2003	05/15/2009	534.13	542.64	-8.51	0.00
735.3600	31282R4T8	FHLMC POOL #M80834 4.50000% 8/01/10	07/30/2003	06/15/2009	735.36	747.08	-11.72	0.00
993.1100	31282R4T8	FHLMC POOL #M80834 4.50000% 8/01/10	07/30/2003	07/15/2009	993.11	1,008.94	-15.83	0.00
644.9400	31282R4T8	FHLMC POOL #M80834 4.50000% 8/01/10	07/30/2003	08/15/2009	644.94	655.22	-10.28	0.00
581.3500	31282R4T8	FHLMC POOL #M80834 4.50000% 8/01/10	07/30/2003	09/15/2009	581.35	590.62	-9.27	0.00
249.8600	31282R5D2	FHLMC POOL #M80844 4.00000% 9/01/10	09/12/2003	01/15/2009	249.86	250.72	-0.86	0.00
610.0600	31282R5D2	FHLMC POOL #M80844 4.00000% 9/01/10	09/12/2003	02/15/2009	610.06	612.16	-2.10	0.00
790.0000	31282R5D2	FHLMC POOL #M80844 4.00000% 9/01/10	09/12/2003	03/15/2009	790.00	792.72	-2 72	0.00
942.4700	31282R5D2	FHLMC POOL #M80844 4.00000% 9/01/10	09/12/2003	04/15/2009	942.47	945.71	-3.24	0.00
837.6900	31282R5D2	FHLMC POOL #M80844 4.00000% 9/01/10	09/12/2003	05/15/2009	837.69	840.57	-2 88	0.00
762.3700	31282R5D2	FHLMC POOL #M80844 4.00000% 9/01/10	09/12/2003	06/15/2009	762.37	764.99	-2.62	0.00
902.0700	31282R5D2	FHLMC POOL #M80844 4.00000% 9/01/10	09/12/2003	07/15/2009	902.07	905.17	-3.10	0 00
793.7600	31282R5D2	FHLMC POOL #M80844 4.00000% 9/01/10	09/12/2003	08/15/2009	793.76	796.49	-2.73	0.00

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2009 Tax Information Statement

Account Number:	5-06103-00
Recipient's Tax ID number:	91-2086157
Payer's Federal ID number:	42-0943319
Questions?	(712)277-6586

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address
CHESTERMAN FAMILY FOUNDATION
PO BOX 3657
SIOUX CITY, IA 51102

Payer's Name and Address
THE SECURITY NATIONAL BANK OF SIOUX CITY
601 PIERCE ST
SIOUX CITY, IA 51101

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
766.7100	31282R5D2	FHLMC POOL #M80844 4.00000% 9/01/10	09/12/2003	09/15/2009	766.71	769.34	-2.63	0.00
2455.2000	31282VB38	FHLMC POOL #M90958 4.00000% 12/01/09	11/22/2004	01/15/2009	2,455.20	2,482.82	-27 62	0.00
1039.4200	31282VB38	FHLMC POOL #M90958 4.00000% 12/01/09	11/22/2004	02/15/2009	1,039.42	1,051.11	-11.69	0.00
1009 2600	31282VB38	FHLMC POOL #M90958 4.00000% 12/01/09	11/22/2004	03/15/2009	1,009.26	1,020.61	-11.35	0.00
2782.7300	31282VB38	FHLMC POOL #M90958 4.00000% 12/01/09	11/22/2004	04/15/2009	2,782.73	2,814.04	-31.31	0.00
1191 9100	31282VB38	FHLMC POOL #M90958 4.00000% 12/01/09	11/22/2004	05/15/2009	1,191.91	1,205.32	-13.41	0.00
2392.6000	31282VB38	FHLMC POOL #M90958 4.00000% 12/01/09	11/22/2004	06/15/2009	2,392.60	2,419.52	-26.92	0 00
1095.5700	31282VB38	FHLMC POOL #M90958 4.00000% 12/01/09	11/22/2004	07/15/2009	1,095.57	1,107.89	-12.32	0.00
1262 0300	31282VB38	FHLMC POOL #M90958 4.00000% 12/01/09	11/22/2004	08/15/2009	1,262.03	1,276.23	-14 20	0.00
1640.4000	31282VB38	FHLMC POOL #M90958 4.00000% 12/01/09	11/22/2004	09/15/2009	1,640.40	1,658.85	-18.45	0.00
341.5800	31371LB65	FNMA POOL #254861 4.00000% 8/01/10	07/21/2003	01/25/2009	341.58	347.77	-6.19	0.00
487.8800	31371LB65	FNMA POOL #254861 4.00000% 8/01/10	07/21/2003	02/25/2009	487.88	496.72	-8.84	0.00
558.4600	31371LB65	FNMA POOL #254861 4.00000% 8/01/10	07/21/2003	03/25/2009	558.46	568.58	-10.12	0.00
732.8100	31371LB65	FNMA POOL #254861 4.00000% 8/01/10	07/21/2003	04/25/2009	732.81	746.09	-13 28	0.00

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2009 Tax Information Statement

Account Number: 5-06103-00
Recipient's Tax ID number: 91-2086157
Payer's Federal ID number: 42-0943319
Questions? (712)277-6586

☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address
CHESTERMAN FAMILY FOUNDATION
PO BOX 3657
SIOUX CITY, IA 51102

Payer's Name and Address
THE SECURITY NATIONAL BANK OF SIOUX CITY
601 PIERCE ST
SIOUX CITY, IA 51101

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
890.7300	31371LB65	FNMA POOL #254861 4.00000% 8/01/10	07/21/2003	05/25/2009	890.73	906.87	-16.14	0.00
838.5500	31371LB65	FNMA POOL #254861 4.00000% 8/01/10	07/21/2003	06/25/2009	838.55	853.75	-15.20	0.00
956.4000	31371LB65	FNMA POOL #254861 4.00000% 8/01/10	07/21/2003	07/25/2009	956.40	973.74	-17.34	0.00
655.2300	31371LB65	FNMA POOL #254861 4.00000% 8/01/10	07/21/2003	08/25/2009	655.23	667.11	-11.88	0.00
584.5200	31371LB65	FNMA POOL #254861 4.00000% 8/01/10	07/21/2003	09/25/2009	584.52	595.11	-10.59	0.00
610.4900	31371LRL5	FNMA POOL #255291 4.50000% 6/01/14	11/18/2004	01/25/2009	610.49	621.55	-11.06	0.00
681.4900	31371LRL5	FNMA POOL #255291 4.50000% 6/01/14	11/18/2004	02/25/2009	681.49	693.84	-12.35	0.00
679.4900	31371LRL5	FNMA POOL #255291 4.50000% 6/01/14	11/18/2004	03/25/2009	679.49	691.81	-12.32	0.00
771.1500	31371LRL5	FNMA POOL #255291 4.50000% 6/01/14	11/18/2004	04/25/2009	771.15	785.13	-13.98	0.00
713.0500	31371LRL5	FNMA POOL #255291 4.50000% 6/01/14	11/18/2004	05/25/2009	713.05	725.97	-12.92	0.00
708.3400	31371LRL5	FNMA POOL #255291 4.50000% 6/01/14	11/18/2004	06/25/2009	708.34	721.18	-12.84	0.00
718.0000	31371LRL5	FNMA POOL #255291 4.50000% 6/01/14	11/18/2004	07/25/2009	718.00	731.01	-13.01	0.00
794.3500	31371LRL5	FNMA POOL #255291 4.50000% 6/01/14	11/18/2004	08/25/2009	794.35	808.75	-14.40	0.00
513.9200	31371LRL5	FNMA POOL #255291 4.50000% 6/01/14	11/18/2004	09/25/2009	513.92	523.23	-9.31	0.00
500.0000	302571104	FPL GROUP INC	03/25/2003	07/27/2009	29,980.17	14,832.50	15,147.67	0.00
2824.8590	38141W208	G S ULTRA-SHORT DURATION GOVT FD 450	06/25/2003	07/31/2009	25,000.00	27,033.90	-2,033.90	0.00
4403.2710	38141W208	G S ULTRA-SHORT DURATION GOVT FD 450	06/25/2003	10/05/2009	38,968.95	42,139.30	-3,170 35	0.00
1000.0000	370021107	GENERAL GROWTH PPTYS INC	VARIOUS	04/28/2009	574 98	26,597.15	-26,022.17	0 00

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2009 Tax Information Statement

Account Number: 5-06103-00
Recipient's Tax ID number: 91-2086157
Payer's Federal ID number: 42-0943319
Questions? (712)277-6586

☐ Corrected ☐ 2nd TIN notice

Payer's Name and Address
THE SECURITY NATIONAL BANK OF SIOUX CITY
601 PIERCE ST
SIOUX CITY, IA 51101

Recipient's Name and Address
CHESTERMAN FAMILY FOUNDATION
PO BOX 3657
SIOUX CITY, IA 51102

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
(Box 5)	*(Box 1b)*	*(Box 7)*		*(Box 1a)*	*(Box 2)*			*(Box 4)*
1462.7940	399874106	GROWTH FUND OF AMERICA	VARIOUS	06/11/2009	34,609.71	36,978.46	-2,368.75	0.00
1514.7740	411511504	HARBOR CAP APPRECIATION US EQUITIES	VARIOUS	06/11/2009	41,398.77	53,594.38	-12,195.61	0.00
1336.3810	461308108	INVESTMENT CO OF AMERICA	VARIOUS	06/11/2009	29,707.75	39,104.65	-9,396.90	0.00
2366.4470	780905840	PENNSYLVANIA MUTUAL-ROYCE FUNDS	VARIOUS	06/11/2009	18,623.94	29,626.42	-11,002.48	0.00
700.0000	717081103	PFIZER INC	02/24/1994	04/28/2009	9,353.15	3,349.79	6,003.36	0.00
1393.2610	836083105	SOUND SHORE FD INC	VARIOUS	06/11/2009	34,483.21	57,798 81	-23,315 60	0.00
3346.4050	875921108	TARGET LARGE CAP VALUE PORT	VARIOUS	06/11/2009	26,637.38	54,770.89	-28,133.51	0.00
Total Long Term 15% Sales Reported on 1099-B					**514,449.30**	**680,786.22**	**-166,336.92**	**0.00**

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