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

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Service

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

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

G Check all that apply: ☐ Initial return ☐ Initial Return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name changeUse the
IRS label.
Otherwise,
print
or type.
See Specific
Instructions.SCHOLARSHIP FUND OF THE GATEWAY MASONIC
LODGE #175, A.F. & A.M., INC.
15 NW 17TH PLACE
WARRENTON, OR 97146

A Employer identification number

93-1326010

B Telephone number (see the instructions)

503-861-1133

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 ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐H Check type of organization: ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, column (c), line 16)

\$ 1,413,230.

J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____

(Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses

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

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

REVENUE

- 1 Contributions, gifts, grants, etc. received (att sch)
- 2 Ck ☒ if the foundn is not req to att Sch B
- 3 Interest on savings and temporary cash investments
- 4 Dividends and interest from securities
- 5a Gross rents
- b Net rental income or (loss)
- 6a Net gain/(loss) from sale of assets not on line 10
- b Gross sales price for all assets on line 6a 1,062,000.
- 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/(loss) (att sch)
- 11 Other income (attach schedule)

12 Total. Add lines 1 through 11

13 Compensation of officers, directors, trustees, etc

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule)

b Accounting fees (attach sch) SEE ST 1

c Other prof fees (attach sch)

17 Interest

18 Taxes (attach schedule)(see instr) SEE STM 2

19 Depreciation (attach sch) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

SEE STATEMENT 3

24 Total operating and administrative expenses. Add lines 13 through 23

25 Contributions, gifts, grants paid PART XV

26 Total expenses and disbursements. Add lines 24 and 25

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

c Adjusted net income (if negative, enter -0-)

48,893.

48,893.

48,893.

8,178.

8,178.

8,178.

57,071.

57,071.

57,071.

0.

2,000.

1,000.

1,000.

734.

367.

367.

2,000.

1,000.

1,000.

89.

45.

44.

4,823.

2,412.

2,411.

86,025.

86,025.

90,848.

2,412.

0.

88,436.

-33,777.

54,659.

57,071.

11 914

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	1,160,453.	795,412.	803,902.
	3 Accounts receivable			
	Less: allowance for doubtful accounts			
	4 Pledges receivable			
	Less: allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7 Other notes and loans receivable (attach sch)			
	Less: allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	760.	560.	560.
	10a Investments – U.S. and state government obligations (attach schedule)			
	b Investments – corporate stock (attach schedule) STATEMENT 4		379,083.	410,129.
	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) STATEMENT 5	268,262.	220,643.	198,639.	
14 Land, buildings, and equipment: basis				
Less: accumulated depreciation (attach schedule)				
15 Other assets (describe)				
16 Total assets (to be completed by all filers – see instructions. Also, see page 1, item I)	1,429,475.	1,395,698.	1,413,230.	
LIABILITIES	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
FUND ASSETS	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	1,429,475.	1,395,698.	
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
30 Total net assets or fund balances (see the instructions)	1,429,475.	1,395,698.		
31 Total liabilities and net assets/fund balances (see the instructions)	1,429,475.	1,395,698.		

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	1,429,475.
2 Enter amount from Part I, line 27a	2	-33,777.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	1,395,698.
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	1,395,698.

Part IV Capital Gains and Losses for Tax on Investment Income

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

(b) How acquired
P – Purchase
D – Donation(c) Date acquired
(month, day, year)(d) Date sold
(month, day, year)**1a SEE STATEMENT 6****b****c****d****e**

(e) Gross sales price

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

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

(i) Fair Market Value
as of 12/31/69(j) Adjusted basis
as of 12/31/69(k) Excess of column (i)
over column (j), if any(l) Gains (Column (h)
gain minus column (k), but not less
than -0-) or Losses (from column (h))**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**

0.

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

0.

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

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

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

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

☐ Yes☒ No

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

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2008	77,689.	1,460,521.	0.053193
2007	83,233.	1,522,055.	0.054685
2006	65,134.	1,446,307.	0.045035
2005	75,608.	1,391,925.	0.054319
2004	43,642.	1,339,302.	0.032586

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

0.239818

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**

0.047964

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

1,365,760.

5 Multiply line 4 by line 3**5**

65,507.

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

547.

7 Add lines 5 and 6**7**

66,054.

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

88,436.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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

1 a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter 'N/A' on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary - see instr.)		1	547.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0.
3 Add lines 1 and 2		3	547.
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	547.
6 Credits/Payments:			
a 2009 estimated tax pmts and 2008 overpayment credited to 2009	6a	560.	
b Exempt foreign organizations — tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	560.	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	2.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	11.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax	11.	Refunded	0.

Part VII-A Statements Regarding Activities

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

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Part VII-A Statements Regarding Activities Continued

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>GILBERT GRAMSON</u> Telephone no <u>(503) 861-1133</u> Located at <u>15 NW 17TH PLACE WARRENTON OR</u> ZIP + 4 <u>97146</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>	N/A	☐	N/A

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.

	Yes	No
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 the instructions)? Organizations relying on a current notice regarding disaster assistance check here ☐	1b	N/A
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)).		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? If 'Yes,' list the years <u>20__ , 20__ , 20__ , 20__</u>	☐ Yes ☒ No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see the instructions)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. <u>20__ , 20__ , 20__ , 20__</u>		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ 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	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b N/A

Organizations relying on a current notice regarding disaster assistance check here

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

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

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

6b X

If 'Yes' to 6b, file Form 8870

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

7b N/A

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

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

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

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

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

0

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

3 Five highest-paid independent contractors for professional services – (see instructions). If none, enter 'NONE'.

(a) Name, and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 GRANTING OF SCHOLARSHIPS TO COLLEGE STUDENTS	
	86,025.
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions	
3	
Total. Add lines 1 through 3	0.

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a Average monthly fair market value of securities	1a	1,299,744.
b Average of monthly cash balances	1b	86,814.
c Fair market value of all other assets (see instructions)	1c	
d Total (add lines 1a, b, and c)	1d	1,386,558.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	1,386,558.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	20,798.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,365,760.
6 Minimum investment return. Enter 5% of line 5	6	68,288.

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

1 Minimum investment return from Part X, line 6	N/A	1	
2a Tax on investment income for 2009 from Part VI, line 5	2a		
b Income tax for 2009. (This does not include the tax from Part VI.)	2b		
c Add lines 2a and 2b	2c		
3 Distributable amount before adjustments. Subtract line 2c from line 1	3		
4 Recoveries of amounts treated as qualifying distributions	4		
5 Add lines 3 and 4	5		
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		

Part XII Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1a	88,436.
b Program-related investments — total from Part IX-B	1b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the:		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	88,436.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	547.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	87,889.

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.

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Part XIII Undistributed Income (see instructions)

N/A

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only				
b Total for prior years: 20 __, 20 __, 20 __				
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e				
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$				
a Applied to 2008, but not more than line 2a				
b Applied to undistributed income of prior years (Election required – see instructions)				
c Treated as distributions out of corpus (Election required – see instructions)				
d Applied to 2009 distributable amount				
e Remaining amount distributed out of corpus				
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				
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 instructions				
e Undistributed income for 2008 Subtract line 4a from 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				
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)				
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9.				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

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

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling 5/23/02

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

	Prior 3 years				(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	57,071.	55,360.	76,103.	72,156.	260,690.
b 85% of line 2a	48,510.	47,056.	64,688.	61,333.	221,587.
c Qualifying distributions from Part XII, line 4 for each year listed	88,436.	78,223.	85,551.	66,136.	318,346.
d Amounts included in line 2c not used directly for active conduct of exempt activities					0.
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	88,436.	78,223.	85,551.	66,136.	318,346.
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	45,525.	48,684.	50,735.	48,210.	193,154.
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 organization had \$5,000 or more in assets at any time during the year – see 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))

NONE

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

NONE

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

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

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

SEE STATEMENT 8

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

SEE STATEMENT FOR LINE 2A

- c** Any submission deadlines:

SEE STATEMENT FOR LINE 2A

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

SEE STATEMENT FOR LINE 2A

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

Recipient	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
Name and address (home or business)				
a Paid during the year SEE ATTACHED SCHEDULE	NONE		SEE ATTACHED SCHEDULE	86,025.
Total				86,025.
b Approved for future payment				
Total				

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CLIENT 00124470

SCHOLARSHIP FUND OF THE GATEWAY MASONIC
LODGE #175, A.F. & A.M., INC.

93-1326010

5/12/10

05.38PM

STATEMENT 1
FORM 990-PF, PART I, LINE 16B
ACCOUNTING FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	\$ 2,000.	\$ 1,000.		\$ 1,000.
TOTAL	\$ 2,000.	\$ 1,000.	\$ 0.	\$ 1,000.

STATEMENT 2
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX	\$ 4.	\$ 2.		\$ 2.
IRS FOUNDATION TAX	542.	271.		271.
OREGON TAX	188.	94.		94.
TOTAL	\$ 734.	\$ 367.	\$ 0.	\$ 367.

STATEMENT 3
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
SUPPLIES	\$ 89.	\$ 45.		\$ 44.
TOTAL	\$ 89.	\$ 45.	\$ 0.	\$ 44.

STATEMENT 4
FORM 990-PF, PART II, LINE 10B
INVESTMENTS - CORPORATE STOCKS

CORPORATE STOCKS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
AT&T INC	COST	\$ 10,352.	\$ 11,212.
VERIZON	COST	9,112.	9,939.
FORD MOTOR CO	COST	5,363.	10,000.
EXXON MOBIL	COST	10,555.	10,229.
INTEL	COST	7,857.	10,200.
MCDONALDS	COST	10,899.	12,488.
DEERE & CO	COST	6,339.	8,113.
COLGATE PALMOLIVE	COST	11,305.	12,323.
PROCTOR & GAMBLE	COST	11,211.	12,126.
PEPSICO INC	COST	16,947.	18,240.
UNITED TECH	COST	10,483.	13,882.
GENERAL MILLS	COST	17,757.	21,243.
CHESAPEAKE ENERGY	COST	10,767.	12,940.

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SCHOLARSHIP FUND OF THE GATEWAY MASONIC
LODGE #175, A.F. & A.M., INC.

93-1326010

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STATEMENT 4 (CONTINUED)
FORM 990-PF, PART II, LINE 10B
INVESTMENTS - CORPORATE STOCKS

CORPORATE STOCKS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
GOLD CORP INC	COST	\$ 14,573.	\$ 15,736.
HEINZ	COST	11,689.	12,828.
3M	COST	14,101.	16,534.
AMERICAN TOWER	COST	10,378.	12,963.
HUMANA	COST	16,398.	17,556.
KELLOGG	COST	21,154.	21,280.
WALMART STORES	COST	16,247.	16,035.
MCKESSON CORP	COST	18,179.	18,750.
MERCK & CO INC	COST	18,352.	18,270.
ROSS STORES INC	COST	12,926.	12,813.
CHUBB CORP	COST	19,375.	19,672.
CATERPILLAR INC	COST	16,760.	17,097.
BARCLAYS BK	COST	50,004.	47,660.
	TOTAL	\$ 379,083.	\$ 410,129.

STATEMENT 5
FORM 990-PF, PART II, LINE 13
INVESTMENTS - OTHER

OTHER SECURITIES	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
GEORGIA POWER CAP TRUST	COST	\$ 50,004.	\$ 50,864.
BK AMERICA CAP	COST	65,004.	49,452.
AMERICAN CENTURY	COST	92,095.	81,126.
VANGUARD CAPITAL	COST	13,540.	17,197.
	TOTAL	\$ 220,643.	\$ 198,639.

STATEMENT 6
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
1	ADVANTA BANK	PURCHASED	3/14/2008	3/19/2009
2	CAPITAL ONE BANK	PURCHASED	2/29/2008	3/05/2009
3	CAPITAL ONE NA	PURCHASED	8/08/2008	8/13/2009
4	CATHAY BANK	PURCHASED	7/18/2008	7/23/2009
5	CENTER BANK	PURCHASED	11/17/2008	11/25/2009
6	ENTERPRISE BANK & TRUST	PURCHASED	9/19/2008	9/25/2009
7	EAST NATIONAL BANK	PURCHASED	7/16/2008	7/24/2009
8	FSG BANK NA	PURCHASED	3/14/2008	3/26/2009
9	MIDFIRST BANK	PURCHASED	9/18/2008	9/24/2009
10	NATIONAL BANK SOUTH CAROLINA	PURCHASED	8/15/2008	8/21/2009
11	PINNACLE NATIONAL BANK	PURCHASED	9/18/2009	9/25/2009
12	STATE BANK OF INDIA	PURCHASED	9/05/2008	9/11/2009

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SCHOLARSHIP FUND OF THE GATEWAY MASONIC
LODGE #175, A.F. & A.M., INC.

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STATEMENT 6 (CONTINUED)
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
1	100,000.		100,000.	0.				\$ 0.
2	100,000.		100,000.	0.				0.
3	50,000.		50,000.	0.				0.
4	71,000.		71,000.	0.				0.
5	95,000.		95,000.	0.				0.
6	96,000.		96,000.	0.				0.
7	72,000.		72,000.	0.				0.
8	100,000.		100,000.	0.				0.
9	96,000.		96,000.	0.				0.
10	90,000.		90,000.	0.				0.
11	96,000.		96,000.	0.				0.
12	96,000.		96,000.	0.				0.
							TOTAL	\$ 0.

STATEMENT 7
FORM 990-PF, PART VIII, LINE 1
LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
RONALD C. COLEMAN 34662 AIRPORT LN WARRENTON, OR 97146	PRESIDENT 0	\$ 0.	\$ 0.	\$ 0.
GILBERT GRAMSON 15 NW 17TH PLACE WARRENTON, OR 97146	SECRETARY 0	0.	0.	0.
DICK HELLBERG 900 SE ANCHOR AVE WARRENTON, OR 97146	DIRECTOR 0	0.	0.	0.
BRAD HORN 235 HARBOR ST WARRENTON, OR 97146	0	0.	0.	0.
DAN HUMPHRIES 34495 HWY 105 ASTORIA, OR 97103	0	0.	0.	0.
ROGER K. WILLIAMS 315 SW CEDAR ST WARRENTON, OR 97146	0	0.	0.	0.

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SCHOLARSHIP FUND OF THE GATEWAY MASONIC
LODGE #175, A.F. & A.M., INC.

93-1326010

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STATEMENT 7 (CONTINUED)
FORM 990-PF, PART VIII, LINE 1
LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
JACK BRADBURY P.O. BOX 430 WARRENTON, OR 97146	0	\$ 0.	\$ 0.	\$ 0.
TOTAL		\$ 0.	\$ 0.	\$ 0.

STATEMENT 8
FORM 990-PF, PART XV, LINE 2A-D
APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM: SCHOLARSHIP FUND COMMITTEE
NAME:
CARE OF: WARRENTON HIGH SCHOOL SCHOLARSHIPS INC
STREET ADDRESS: PO BOX 316
CITY, STATE, ZIP CODE: WARRENTON, OR 97146
TELEPHONE: 503-861-3317
FORM AND CONTENT: WARRENTON HIGH SCHOOL SCHOLARSHIPS, INC FACILITATES THE APPLICATION PROCESS. THEY PROVIDE STUDENTS WITH APPLICATION FORMS AND A LIST OF MATERIALS TO BE INCLUDED.
SUBMISSION DEADLINES: 4/02/2009
RESTRICTIONS ON AWARDS: APPLICANTS MUST BE A STUDENT AND GRADUATE FROM WARRENTON HIGH SCHOOL. WARRENTON HIGH SCHOOL IS LOCATED IN WARRENTON, OREGON.

GATEWAY MASONIC LODGE SCHOLARSHIPS, INC.
2009 Scholarship Recipients

\$3000 SCHOLARSHIPS

James Bechtel
89754 Raymond Road
Astoria, OR 97103

Oregon State University
218 Kerr Administration Bldg
Corvallis, OR 97331-4501

Aaron Burkhardt
PO Box 985
Warrenton, OR 97146

George Fox University
414 North Meridian Street #6129
Newberg, OR 97132

Sarah Chamberlain
519 N Main Ave
Warrenton, OR 97146

Oregon State University
218 Kerr Administration Bldg
Corvallis, OR 97331-4501

Audrey Dove
PO Box 321
Hammond, OR 97121

George Fox University
414 North Meridian Street #6129
Newberg, OR 97132

Lauren Dove
PO Box 321
Hammond, OR 97121

Oregon State University
218 Kerr Administration Bldg
Corvallis, OR 97331-4501

Eric Gantenbein
901697 South Lake Road
Warrenton, OR 97146

George Fox University
414 North Meridian Street #6129
Newberg, OR 97132

Janessa Gramson
1197 SW Pine Dr
Warrenton, OR 97146

Pacific Lutheran University
12180 Park Avenue S.
Tacoma, WA 98447

LesleAnn Hayward
855 Alternate Hwy
Warrenton, OR 97146

Oregon State University
218 Kerr Administration Bldg
Corvallis, OR 97331-4501

Brandi Jasmine
33219 Deerfield Lane
Warrenton, OR 97146

George Fox University
414 North Meridian Street #6129
Newberg, OR 97132

Brianna McCain
725 Peacock Street
Hammond, OR 97121

Western Oregon University
345 North Monmouth
Monmouth, OR 97361

Crystal McCallister
330 SW 1st Street
Warrenton, OR 97146

Portland State University
PO Box 751
Portland, Oregon 97207

GATEWAY MASONIC LODGE SCHOLARSHIPS, INC.
2009 Scholarship Recipients

\$3000 SCHOLARSHIPS

Tara McDowell
998 NW Warrenton Dr.
Warrenton, OR 97146

Oregon State University
218 Kerr Administration Bldg
Corvallis, OR 97331-4501

Justine Marxer
1453 SW Oak St
Warrenton, OR 97146

George Fox University
414 North Meridian Street #6129
Newberg, OR 97132

Olivia Newbold
2024 NE 49th Ave
Portland, OR 97213

Portland State University
PO Box 751
Portland, Oregon 97207

Michael O'Casey
33813 Perkins Lane
Warrenton, OR 97146

University of Montana
32 Campus Drive
Missoula, MT 59812

Emily Ogren
PO Box 184
Hammond, OR 97146

University of Montana
32 Campus Drive
Missoula, MT 59812

Billy Pike
175 West Harbor St
Warrenton, OR 97146

Oregon State University
218 Kerr Administration Bldg
Corvallis, OR 97331-4501

Nathan Porter
608 7th Court
Hammond, OR 97121

Oregon State University
218 Kerr Administration Bldg
Corvallis, OR 97331-4501

Hailey Proctor
63 NW Gardenia
Warrenton, OR 97146

Western Oregon University
345 North Monmouth
Monmouth, OR 97361

Anne Wickliffe
158 SW Birch Ave
Warrenton, OR 97146

Oregon State University
218 Kerr Administration Bldg
Corvallis, OR 97331-4501

Pamela Wilkins
33043 Douglas Lane
Warrenton, OR 97146

George Fox University
414 North Meridian Street #6129
Newberg, OR 97132

**GATEWAY MASONIC LODGE SCHOLARSHIPS, INC.
2009 Scholarship Recipients**

\$2000 SCHOLARSHIPS

Jessica Hoffman
1094 SE 2nd Street
Warrenton, OR 97146

Roberta Kelley
535 NW 7th Place
Warrenton, OR 97146

Brianna McCain
725 Peacock Street
Hammond, OR 97121

Jordane Marxer
1453 SW Oak Ave
Warrenton, OR 97146

Steven Scroup
91618 Smith Lake Rd
Warrenton, OR 97146

Clatsop Community College
1653 Jerome Avenue
Astoria, OR 97103

Pacific University
2043 College Way
Forest Grove, OR 97116

Western Oregon University
345 North Monmouth
Monmouth, OR 97361

Lower Columbia College
PO Box 3010
Longview, WA 98632

Clatsop Community College
1653 Jerome Avenue
Astoria, OR 97103

\$1000 SCHOLARSHIPS

Henry Balensifer
947 SE Anchor Ave
Warrenton, OR 97146

Erika Barber
92255 Moore Rd
Warrenton, OR 97146

William Bridgeman
342 37th St
Astoria, OR 97103

Andrew Dugan
1515 S Main Ave
Warrenton, OR 97146

David Dyer
PO Box 1057
Warrenton, OR 97146

George Fox University
414 North Meridian Street #6129
Newberg, OR 97132

Clatsop Community College
1653 Jerome Avenue
Astoria, OR 97103

Clatsop Community College
1653 Jerome Avenue
Astoria, OR 97103

Oregon State University
218 Kerr Administration Bldg
Corvallis, OR 97331-4501

Clatsop Community College
1653 Jerome Avenue
Astoria, OR 97103

GATEWAY MASONIC LODGE SCHOLARSHIPS, INC.

2009 Scholarship Recipients

Ryan Lampi
1441 South Main
Warrenton, OR 97146

George Fox University
414 North Meridian Street #6129
Newberg, OR 97132

Chad McDowell
998 Warrenton Drive
Warrenton, OR 97146

Oregon State University
218 Kerr Administration Bldg
Corvallis, OR 97331-4501

Brian McNulty
787 Jade Ave
Warrenton, Oregon 97146

Oregon State University
218 Kerr Administration Bldg
Corvallis, OR 97331-4501

Ben Murphy
35 NW Birch Ave
Warrenton, OR 97146

Linn Benton Community College
6500 Pacific Blvd SW
Albany, OR 97321

Nick Porter
608 7th Court
Hammond, OR 97121

Clatsop Community College
1653 Jerome Avenue
Astoria, OR 97103

Other Scholarships:

\$500

Henry Balensifer
947 SE Anchor Ave
Warrenton, OR 97146

Clatsop Community College
1653 Jerome Avenue
Astoria, OR 97103

\$500

Henry Balensifer

George Fox University
414 North Meridian Street #6129
Newberg, OR 97132

\$670

David Dyer
PO Box 1057
Warrenton, OR 97146

Clatsop Community College
1653 Jerome Avenue
Astoria, OR 97103

\$1355

Steven Scroup
91618 Smith Lake Rd
Warrenton, OR 97146

Clatsop Community College
1653 Jerome Avenue
Astoria, OR 97103