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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

, 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.

Name of foundation

BARBARA S AND ALLEN C WILCOX, JR  
FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)

83-500 KAWAIKI ROAD

Room/suite

City or town, state, and ZIP code

CAPTAIN COOK, HI 96704

A Employer identification number

94-3270714

B Telephone number

808 329 6439

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

\$ 1,708,885.

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))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received			N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	40,096.	40,096.		Statement 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	-74,045.			
b Gross sales price for all assets on line 6a				
7 Capital gain net income (from Part IV, line 2)		0.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss)				
11 Other income	901.	0.		Statement 2
12 Total: Add lines 1 through 11	-33,048.	40,096.		
13 Compensation of officers, directors, trustees, etc	0.	0.		0.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees				
b Accounting fees				
c Other professional fees Stmt 3	11,401.	11,401.		0.
17 Interest				
18 Taxes Stmt 4	6,526.	6,526.		0.
19 Depreciation and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses Stmt 5	719.	719.		0.
24 Total operating and administrative expenses. Add lines 13 through 23	18,646.	18,646.		0.
25 Contributions, gifts, grants paid	84,050.			84,050.
26 Total expenses and disbursements. Add lines 24 and 25	102,696.	18,646.		84,050.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-135,744.			
b Net investment income (if negative, enter -0-)		21,450.		
c Adjusted net income (if negative, enter -0-)			N/A	

218

Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
Assets	1 Cash - non-interest-bearing	264,734.	460,910.	460,910.
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations Stmt 6	635,247.	185,103.	184,793.
	b Investments - corporate stock Stmt 7	812,144.	928,778.	1,063,182.
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	1,712,125.	1,574,791.	1,708,885.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
Net Assets or Fund Balances	23 Total liabilities (add lines 17 through 22)	0.	0.	
	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	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 ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	1,621,955.	1,621,955.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
Net Assets or Fund Balances	29 Retained earnings, accumulated income, endowment, or other funds	90,170.	-47,164.	
	30 Total net assets or fund balances	1,712,125.	1,574,791.	
	31 Total liabilities and net assets/fund balances	1,712,125.	1,574,791.	

## 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	1,712,125.
2 Enter amount from Part I, line 27a	2	-135,744.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,576,381.
5 Decreases not included in line 2 (itemize) ▶ PRIOR PERIOD ADJUSTMENT	5	1,590.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,574,791.

**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	SCHWAB (SEE STATEMENT D-1)	P	Various	Various
b	SCHWAB (SEE STATEMENT D-1)	P	Various	Various
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		9,969.	-9,969.
b		64,076.	-64,076.
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			-9,969.
b			-64,076.
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	-74,045.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	66,950.	1,744,112.	.038386
2007	89,905.	1,788,530.	.050268
2006	91,336.	1,723,009.	.053010
2005	78,427.	1,675,025.	.046821
2004	35,815.	1,609,224.	.022256

  

2 Total of line 1, column (d)	2	.210741
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	.042148
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,619,805.
5 Multiply line 4 by line 3	5	68,272.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	215.
7 Add lines 5 and 6	7	68,487.
8 Enter qualifying distributions from Part XII, line 4 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.	8	84,050.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	215.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	215.
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	215.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	1,485.	
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	1,485.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,270.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input checked="" type="checkbox"/> 1,270. Refunded <input type="checkbox"/>	11	0.	

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 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 instructions) <input checked="" type="checkbox"/> HI		
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)? 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

N/A

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address **N/A**

14 The books are in care of **BETTY CHEE** Telephone no. **808 329 6439**  
 Located at **83-500 KEAWAIKI ROAD, CAPTAIN COOK, HI** ZIP+4 **96704**

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ☐  
 and enter the amount of tax-exempt interest received or accrued during the year **15** **N/A**

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	<b>N/A</b>	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years <b>N/A</b>		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	<b>N/A</b>	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)	<b>N/A</b>	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b

Form 990-PF (2009)

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

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

N/A

5b

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?

N/A

7b

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 8		0.	0.	0.

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

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

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

0

Form 990-PF (2009)

**Part VIII****Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3** Five highest-paid independent contractors for professional services. 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 N/A	
2	
3	
4	

**Part IX-B** Summary of Program-Related Investments

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.

Form 990-PF (2009)



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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	1,404,899.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	239,573.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	1,644,472.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	1,644,472.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	24,667.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	1,619,805.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	80,990.

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	80,990.
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	215.
<b>b</b>	Income tax for 2009. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	215.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	80,775.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	80,775.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	80,775.

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	84,050.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	84,050.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	215.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	83,835.

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

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

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				80,775.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007	3,743.			
e From 2008				
f Total of lines 3a through e	3,743.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$	84,050.			
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				80,775.
e Remaining amount distributed out of corpus	3,275.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:	7,018.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	7,018.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007	3,743.			
d Excess from 2008				
e Excess from 2009	3,275.			



**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)				
<b>a</b> <i>Paid during the year</i> <b>SEE STATEMENT C</b>				84,050.
<b>Total</b>			▶ <b>3a</b>	<b>84,050.</b>
<b>b</b> <i>Approved for future payment</i>  None				
<b>Total</b>			▶ <b>3b</b>	<b>0.</b>





**Cadinha & Co., LLC**  
**REALIZED GAINS AND LOSSES**  
**BARBARA S. & ALLEN C. WILCOX, JR., FOUNDATION**

2766

From 01-01-09 Through 12-31-09

Open Date	Close Date	Quantity	Security	Cost Basis	Proceeds	Gain Or Loss	
						Short Term	Long Term
11-28-08	02-12-09	1,300	CUMMINS	33,161 44	31,802 78	-1,358 66	
08-28-08	02-18-09	400	XTO ENERGY	20,265 91	13,573 33	-6,692 58	
01-01-50	02-25-09	210	PEPSICO	12,511 70	10,662 82		-1,848 88
05-22-07	02-25-09	290	PEPSICO	19,954 90	14,724 84		-5,230 06
05-31-07	02-25-09	200	PEPSICO	13,745 95	10,155 07		-3,590 88
08-08-08	02-26-09	700	MC DONALD'S	46,087 50	36,986 75	-9,100 75	
05-25-07	03-02-09	300	STRYKER	20,119 20	9,913 85		-10,205 35
11-07-08	03-02-09	1,900	ISHARES MSCI CANADA	36,915 12	26,604 96	-10,310 16	
05-31-07	03-05-09	300	ALTRIA	6,657 70	4,641 32		-2,016 38
01-01-50	03-05-09	100	PROCTER & GAMBLE	5,732 40	4,506 83		-1,225 57
05-18-07	03-05-09	300	PROCTER & GAMBLE	19,051 46	13,520 51		-5,530 95
05-18-07	03-11-09	100	PROCTER & GAMBLE	6,350 49	4,523 09		-1,827 40
05-31-07	03-11-09	100	PROCTER & GAMBLE	6,383 97	4,523 09		-1,860 88
05-31-07	03-11-09	100	PROCTER & GAMBLE	6,383 98	4,523 09		-1,860 89
09-22-08	03-23-09	300,000	US TSY	321,411 75	329,031 30	7,619 55	
			5 000% Due 08-15-11				
05-18-07	05-07-09	300	COCA-COLA	15,738 95	12,859 03		-2,879 92
05-22-07	05-07-09	300	COCA-COLA	15,543 00	12,859 03		-2,683 97
05-22-07	05-07-09	255	COCA-COLA	13,211 55	10,930 18		-2,281 37
05-22-07	05-07-09	100	COCA-COLA	5,181 00	4,286 34		-894 66
05-22-07	05-07-09	45	COCA-COLA	2,331 45	1,928 85		-402 60
08-08-08	05-07-09	200	COCA-COLA	11,104 41	8,572 69	-2,531 72	
03-25-09	05-07-09	2,400	U S BANCORP (NEW)	36,212 95	47,437 83	11,224 88	
06-22-07	05-15-09	170,000	US TSY	171,806 23	170,000 00		-1,806 23
			5 500% Due 05-15-09				
12-11-08	05-26-09	300	GRAINGER (W W )	20,576 29	23,537 72	2,961 43	
01-29-09	05-26-09	200	GRAINGER (W W )	14,823 09	15,691 82	868 73	
04-16-09	06-09-09	400	NUCOR	17,409 71	18,827 80	1,418 09	
07-15-08	06-18-09	120,000	US TSY INFLATION IX	139,298 60	135,062 16	-4,236 44	
			N/B TII 0 7/8				
			0 875% Due 04-15-10				
06-12-08	06-24-09	900	CANADIAN NATL	44,798 76	37,558 96		-7,239 80
			RAILWAY				
03-18-09	06-24-09	200	CANADIAN NATL	6,969 29	8,346 44	1,377 15	
			RAILWAY				
04-15-09	07-29-09	1,200	CIA VALE DO RIO	19,493 83	22,629 06	3,135 23	
			DOCE-ADR				
01-14-09	08-17-09	100,000	US TSY INFLATION IX	98,720 15	99,700 17	980 02	
			N/B TII 0 5/8				
			0 625% Due 04-15-13				
03-25-09	08-17-09	20,000	US TSY INFLATION IX	19,772 86	19,940 04	167 18	
			N/B TII 0 5/8				
			0 625% Due 04-15-13				
12-18-08	09-01-09	600	HUBBELL CL B	19,211 89	22,190 53	2,978 64	
05-25-07	10-02-09	800	WALGREEN	36,245 60	30,502 37		-5,743 23
03-25-09	10-02-09	200	WALGREEN	5,335 26	7,625 59	2,290 33	
01-06-09	10-02-09	500	HUBBELL CL B	17,245 75	19,885 88	2,640 13	
05-19-09	10-02-09	2,300	ISHARES MSCI	20,765 76	23,889 96	3,124 20	
			SINGAPORE				
05-21-07	10-02-09	501	INTEL	11,380 47	9,550 21		-1,830 26
05-21-07	10-02-09	189	INTEL	4,293 14	3,602 77		-690 37
05-21-07	10-02-09	150	INTEL	3,407 25	2,859 34		-547 91

To Tax Preparers Cadinha tax reports should be used in conjunction with the year-end 1099 reported to the IRS by the custodian (bank or brokerage firm) for tax reporting

**Cadinha & Co., LLC**  
**REALIZED GAINS AND LOSSES**  
**BARBARA S. & ALLEN C. WILCOX, JR., FOUNDATION**  
**2766**  
*From 01-01-09 Through 12-31-09*

Open Date	Close Date	Quantity	Security	Cost Basis	Proceeds	Gain Or Loss	
						Short Term	Long Term
05-21-07	10-02-09	60	INTEL	1,362 90	1,143 74		-219 16
08-08-08	10-02-09	1,000	INTEL	24,080 00	19,062 30		-5,017 70
05-07-09	10-02-09	800	QUANTA SERVICES INC	18,472 71	16,841 01	-1,631 70	
07-24-09	10-02-09	1,000	MEMC ELECTRONIC MATERIALS	18,693 85	15,507 35	-3,186 50	
05-07-09	10-02-09	500	ISHARES MSCI AUSTRALIA INDEX	7,861 11	10,710 82	2,849 71	
08-13-09	10-02-09	1,000	ISHARES FTSE XINHUA CHINA 25	41,639 05	39,431 63	-2,207 42	
10-08-08	10-28-09	400 0000	CURRENCYSHARES SWISS FRANC	35,439 84	38,797 73		3,357 89
11-06-08	10-28-09	400 0000	CURRENCYSHARES CANADIAN DOLLAR	33,718 84	36,950 42	3,231 58	
03-25-09	12-07-09	135,000	US TSY INFLATION IX N/B TII 0 5/8	133,466 80	140,641 93	7,175 13	
10-02-09	12-28-09	290,000	US TSY BND STRP INT 0 625% Due 04-15-13	140,942 90	125,282 90	-15,660 00	
08-17-09	12-28-09	1,400 0000	20+ YEAR TREASURY BOND FUND	132,226 21	125,131 59	-7,094 62	
TOTAL GAINS						54,041 98	3,357 89
TOTAL LOSSES						-64,010 55	-67,434 42
						-9,968.57	-64,076.53
TOTAL REALIZED GAIN/LOSS				1,933,514.92	1,859,469.82		
							-74,045 10

To Tax Preparers Cadinha tax reports should be used in conjunction with the year-end 1099 reported to the IRS by the custodian (bank or brokerage firm) for tax reporting



**BARBARA'S AND ALLEN WILCOX JR FOUNDATION**  
**2009 GRANTS**

<b>09-Date</b>	<b>Payee Organization</b>	<b>Request Project Title</b>	<b>2009</b>
11/1/2009	Cystic Fibrosis Foundation P.O. Box 96305 Washington DC 20090-6305	Program Support	\$ 500.00
11/1/2009	Alzheimers Association	Program Support	\$ 500.00
11/1/2009	American Bible Society Grand Central Station P.O. Box 5625 New York, NY 10163-5625	Program Support	\$ 500.00
11/1/2009	American Federation of Police & Concerned Citizens	Police Family Survivors Fund	\$ 600.00
11/1/2009	American Heart Association, HI Affiliate 245 No. Kukui St., Suite 204 Honolulu, HI 96817-3985	Program Support	\$ 250.00
11/1/2009	American Lung Association of Hawaii	Program Support	\$ 3,000.00
11/1/2009	American Red Cross 2005 Hurricane Relief Fund P.O. Box 97089 Washington, DC 90090-7089	Program Support	\$ 500.00
11/1/2009	Arc of Kona	Program Support	\$ 1,000.00
11/1/2009	Best Friends Animal Sanctuary 5001 Angel Canyon Drive Kanab, UT 8471-5001	Program Support	\$ 1,000.00
11/1/2009	Bible First Mission Church	Program Support	\$ 5,000.00
11/1/2009	Children's Wish Foundation International, Inc. 8615 Roswell Road Atlanta, GA 30350	Program Support	\$ 500.00
11/1/2009	Christian Relief Services Charities, Inc. 2550 Huntington Ave., Suite 200 Alexandria, VA 22303-1400	Running Strong Program	\$ 1,000.00
11/1/2009	Compassion International	Program Support	\$ 500.00
11/1/2009	CSN International	Program Support	\$ 1,000.00
11/1/2009	Daughters of Hawaii Hulihee Palace 2913 Pali Hwy. Honolulu, HI 96817	Program Support	\$ 1,000.00
11/1/2009	Elephant Sanctuary in Hohenwald P.O. Box 393 Hohenwald, TN 38462-0393	Program Support	\$ 1,000.00

**BARBARA S AND ALLEN WILCOX JR FOUNDATION**  
**2009 GRANTS**

<b>09-Date</b>	<b>Payee Organization</b>	<b>Request Project Title</b>	<b>2009</b>
11/1/2009	Family Support Services of West Hawaii 75-127 Lunapule Rd. Suite 11 Kailua-Kona, HI 96740-2119	Program Support	\$ 2,000.00
11/1/2009	Feed the Children	Program Support	\$ 1,000.00
11/1/2009	Friends of the Children's Justice Center of West Hawaii, Inc. 77-6403 Nalani Street Kailua-Kona, HI 96740	Program Support	\$ 1,500.00
11/1/2009	The Gideons International	Program Support	\$ 500.00
11/1/2009	Guiding Eyes For The Blind 611 Granite Springs Rd. Yorktown Heights, NY 10598	Program Support	\$ 1,500.00
11/1/2009	Guideposts Foundation	Program Support	\$ 1,000.00
11/1/2009	Habitat for Humanity West Hawaii Inc	Program Support	\$ 1,000.00
11/1/2009	Hawaii Island Humane Society 74-5225 Queen Kaahumanu Hwy. Kailua-Kona, HI 96740	Program Support	\$ 1,500.00
11/1/2009	Hawaii Island United Way	Program Support	\$ 1,000.00
11/1/2009	Hawaiian Historical Society 560 Kawaiahao Street Honolulu, HI 96813	Program Support	\$ 200.00
11/1/2009	Hawaiian Mission Children's Society 553 South King Street Honolulu, HI 96813	Program Support	\$ 1,500.00
11/1/2009	Heifer International	Program Support	\$ 2,500.00
11/1/2009	Historic Hawaii Foundation P.O. Box 1658 Honolulu, HI 96806-1658	Program Support	\$ 1,000.00
11/1/2009	Hospice of Kona P.O. Box 482 Kealahou, HI 96750	Program Support	\$ 1,000.00
11/1/2009	The Pregnancy Center P.O. Box 1102 Kailua-Kona, HI 96745	Program Support	\$ 1,000.00
11/1/2009	In Touch Ministries P.O. Box 7900 Atlanta, GA 30357	Program Support	\$ 2,400.00
11/1/2009	Jews for Jesus	Program Support	\$ 1,000.00
11/1/2009	Joyce Meyer Ministries	Program Support	\$ 2,400.00

**BARBARA'S AND ALLEN WILCOX JR FOUNDATION  
2009 GRANTS**

<b>09-Date</b>	<b>Payee Organization</b>	<b>Request Project Title</b>	<b>2009</b>
	P.O. Box 655 Fenton, MO 63026		
11/1/2009	Kahikolu Congregational Church P.O. Box 1036 Capt. Cook, HI 96704	Program Support	\$ 1,000.00
11/1/2009	Kahuku Congregational Church P.O. Box 6869 Ocean View, HI 96737-6869 Pastor Harold Teves	Program Support	\$ 2,000.00
11/1/2009	Kona Crime Prevention Committee P.O. Box 2043 Kailua-Kona, HI 96745	Program Support	\$ 1,000.00
11/1/2009	Kona Family YMCA 74-5606 Pawai Place Kailua-Kona, HI 96740 Attn. Exec. Director: Mr. Lester Bates	Program Support	\$ 500.00
11/1/2009	Kona Hospital Foundation 79-1019 Haukapila Street Kealahou, HI 96750	New Chapel Fund	\$ 12,000.00
11/1/2009	Kona Outdoor Circle Educational Center 76-6280 Kuakini Hwy. Kailua-Kona, HI 96740	Program Support	\$ 1,000.00
11/1/2009	Leland Stanford Junior University 301 Encina Hall Stanford, CA 94305-6076	for the Stanford Fund	\$ 1,000.00
11/1/2009	Lesea Broadcasting	Program Support	\$ 4,000.00
3/24/2009	Lesea Broadcasting 61300 S. Ironwood Drive South Bend, Indiana 46614	Program Support	\$ 500.00
11/1/2009	Life Outreach International P.O. Box 982000 Fort Worth, TX 76182-9986	Program Support	\$ 1,200.00
11/1/2009	Lyman House Memorial Museum 275 Haili Street Hilo, HI 96720	Program Support	\$ 500.00
11/1/2009	Memorial Sloan-Kettering Cancer Center 1275 York Ave. New York, NY 10021-6007	Program Support	\$ 1,000.00

BARBARA'S AND ALLEN WILCOX JR FOUNDATION  
2009 GRANTS

09-Date	Payee Organization	Request Project Title	2009
9/1/2009	Mission Houses Museum	Program Support	\$ 1,000.00
11/1/2009	Mokuaikaua Church	Program Support	\$ 1,000.00
11/1/2009	Mothers Against Drunk Driving - Hawaii 700 Bishop Street, Suite 1111 Honolulu, HI 96813	Program Support	\$ 1,000.00
11/1/2009	Nature Conservancy of Hawaii 923 Nuuanu Ave. Honolulu, HI 96817	Program Support	\$ 1,000.00
11/1/2009	Nuclear Age Peace Foundation 1622 Anacapa Street Santa Barbara, CA 93101	Program Support	\$ 1,000.00
11/1/2009	PBS Hawaii 2350 Dole Street Honolulu, HI 96822	Program Support	\$ 500.00
11/1/2009	Prison Fellowship Ministries P.O. Box 17500 Washington, DC 20041-0500	Charles Colson #06487268	\$ 1,500.00
11/1/2009	Pulama Ia Kona Heritage Preservation Council c/o Jill Olson P.O. Box 398 Capt. Cook, HI 96704	Program Support	\$ 500.00
11/1/2009	Smile Train	Program Support	\$ 1,000.00
11/1/2009	Special Olympics Hawaii P.O. Box 3295 Honolulu, HI 96801	Program Support	\$ 1,000.00
11/1/2009	St. Jude Children's Research Hospital P.O. Box 50 Memphis, TN 38101-9929	Program Support	\$ 2,000.00
11/1/2009	Women's Fund of Hawaii 1500 S. Beretania Suite 314 Honolulu, Hi. 96826	Program Support	\$ 1,000.00
11/1/2009	The Food Basket Inc. Hawaii Island Food Bank 140-B Holomua St. Hilo, HI 96720-5132	Program Support	\$ 2,000.00
11/1/2009	World Vision	Program Support	\$ 2,000.00
	<b>TOTAL GRANTS</b>		<b><u>\$ 84,050.00</u></b>

Form 990-PF	Dividends and Interest from Securities	Statement	1
Source	Gross Amount	Capital Gains Dividends	Column (A) Amount
SCHWAB CORPORATE BOND	313.	0.	313.
SCHWAB DIVIDEND	21,923.	0.	21,923.
SCHWAB US GOVT INTEREST	17,860.	0.	17,860.
Total to Form 990-PF, Part I, ln 4	40,096.	0.	40,096.

Form 990-PF	Other Income	Statement	2
Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
FEDERAL TAX REFUND	901.	0.	
Total to Form 990-PF, Part I, line 11	901.	0.	

Form 990-PF	Other Professional Fees			Statement	3
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
INVESTMENT MANAGEMENT FEES	11,401.	11,401.			0.
To Form 990-PF, Pg 1, ln 16c	11,401.	11,401.			0.

Form 990-PF	Taxes			Statement	4
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
EXCISE TAXES	6,271.	6,271.			0.
FOREIGN TAXES	255.	255.			0.
To Form 990-PF, Pg 1, ln 18	6,526.	6,526.			0.

Form 990-PF	Other Expenses			Statement	5
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
FILING FEES	209.	209.			0.
BOND AMORTIZATION	510.	510.			0.
To Form 990-PF, Pg 1, ln 23	719.	719.			0.

Form 990-PF	U.S. and State/City Government Obligations			Statement	6
Description	U.S. Gov't	Other Gov't	Book Value	Fair Market Value	
TREASURY NOTES	X		185,103.	184,793.	
Total U.S. Government Obligations			185,103.	184,793.	
Total State and Municipal Government Obligations					
Total to Form 990-PF, Part II, line 10a			185,103.	184,793.	

Form 990-PF	Corporate Stock		Statement	7
Description	Book Value		Fair Market Value	
EQUITIES	928,778.		1,063,182.	
Total to Form 990-PF, Part II, line 10b	928,778.		1,063,182.	

Form 990-PF      Part VIII - List of Officers, Directors      Statement      8  
 Trustees and Foundation Managers

Name and Address	Title and Avrg Hrs/Wk	Compen- sation	Employee Ben Plan Expense Contrib Account
BARBARA S WILCOX 83-500 KEAWAIKI ROAD CAPTAIN COOK, HI 96704	PRES/SEC/DIRECTOR 1.00	0.	0.      0.
STEVEN C WILCOX 83-500 KEAWAIKI ROAD CAPTAIN COOK, HI 96704	VP/TREAS/DIRECTOR 1.00	0.	0.      0.
ANNE IRENE WILCOX 83-500 KEAWAIKI ROAD CAPTAIN COOK, HI 96704	DIRECTOR 1.00	0.	0.      0.
ALLEN C WILCOX III 83-500 KEAWAIKI ROAD CAPTAIN COOK, HI 96704	DIRECTOR 1.00	0.	0.      0.
BETTY CHEE 83-500 KEAWAIKI ROAD CAPTAIN COOK, HI 96704	DIRECTOR 1.00	0.	0.      0.
Totals included on 990-PF, Page 6, Part VIII		0.	0.      0.

WEALTH MANAGEMENT CPAS  
4001 BISHOP ST , SUITE 2880  
HONOLULU, HI 96813

2009 RETURN OF PRIVATE FOUNDATION - FORM 990-PF

EIN	NAME	CR TO EST
94-3270714	WILCOX, BARBARA S. & ALLEN C., JR. FOUNDATION	1,270.00

Department of the Treasury  
Internal Revenue Service Center  
Ogden, UT 84201-0027

CERTIFIED MAIL NO.  
7010 0290 0001 5837 6993

11/15/2010



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

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

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

<b>Part II Additional (Not Automatic) 3-Month Extension of Time.</b> Only file the original (no copies needed)		
Type or print  File by the extended due date for filing the return See instructions	Name of Exempt Organization <b>BARBARA S AND ALLEN C WILCOX, JR FOUNDATION</b>	Employer identification number <b>94-3270714</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>83-500 KAWAIKI ROAD</b>	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions <b>CAPTAIN COOK, HI 96704</b>	

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

- ☐ Form 990    ☐ Form 990-EZ    ☐ Form 990-T (sec. 401(a) or 408(a) trust)    ☐ Form 1041-A    ☐ Form 5227    ☐ Form 8870  
☐ Form 990-BL    ☒ Form 990-PF    ☐ Form 990-T (trust other than above)    ☐ Form 4720    ☐ Form 6069

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

**BETTY CHEE**

- The books are in the care of ☒ **83-500 KEAWAIKI ROAD - CAPTAIN COOK, HI 96704**

Telephone No. ☒ **808 329 6439**

FAX No. ☐

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

4 I request an additional 3-month extension of time until **November 15, 2010**

5 For calendar year **2009**, or other tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

6 If this tax year is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period

7 State in detail why you need the extension

**Additional time is required in order to gather the necessary information.**

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions	8a	\$	<b>215.</b>
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8b	\$	<b>1,485.</b>
c <b>Balance Due.</b> Subtract line 8b from line 8a Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	8c	\$	<b>0.</b>

**Signature and Verification**

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

Signature ☐

Title ☐

Date ☐