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Form 990-PF

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

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning 01-01-2009 , and ending 12-31-2009

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 SUNFLOWER FOUNDATION		A Employer identification number 95-2644098	
	Number and street (or P O box number if mail is not delivered to street address) C/O POST OFFICE BOX 22557		Room/suite	B Telephone number (see page 10 of the instructions) (805) 563-1049
	City or town, state, and ZIP code SANTA BARBARA, CA 93121		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, col. (c), line 16) \$ 1,713,901		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 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	10,365	10,365	10,365	
	4 Dividends and interest from securities.	4,747	4,747	4,747	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-48,286			
	b Gross sales price for all assets on line 6a _____ 51,662				
	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				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	149,795	149,795	149,795	
	12 Total. Add lines 1 through 11	116,621	164,907	164,907	
	13 Compensation of officers, directors, trustees, etc	45,000	9,000		18,000
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	22,874	16,050		3,824
	c Other professional fees (attach schedule)	150	150		
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	10,259	796		1,592
	19 Depreciation (attach schedule) and depletion . . .	0			
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	24,664	22,842		1,477
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	102,947	48,838		24,893
	25 Contributions, gifts, grants paid	66,500			66,500
	26 Total expenses and disbursements. Add lines 24 and 25	169,447	48,838		91,393
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-52,826			
	b Net investment income (if negative, enter -0-)		116,069		
	c Adjusted net income (if negative, enter -0-)			164,907	

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	23,329	29,631	29,631
	2	Savings and temporary cash investments	145,806	653,864	653,864
	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 15 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			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	28,250 	28,250	13,827
	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)	1,112,387 	567,191	567,191
	14	Land, buildings, and equipment basis ▶ _____ 7,999 Less accumulated depreciation (attach schedule) ▶ _____ 7,999			
	15	Other assets (describe ▶ _____)	 21,836		 449,388
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,331,608	1,278,936	1,713,901

Liabilities	17	Accounts payable and accrued expenses	211	365	
	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)	211	365	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	1,331,397	1,278,571	
	30	Total net assets or fund balances (see page 17 of the instructions)	1,331,397	1,278,571	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	1,331,608	1,278,936	

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 1,331,397
2	Enter amount from Part I, line 27a	2 -52,826
3	Other increases not included in line 2 (itemize) ▶ _____	3
4	Add lines 1, 2, and 3	4 1,278,571
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 1,278,571

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)
1 a	CREDIT SUISSE JAPAN EQUITY FUND	P	2007-12-01	2009-08-04
b	135 SH ALLIANZ NFJ INTL VL VL C	P	2008-12-12	2009-01-14
c	1868 08 SH ALLIANZ NFJ INTL VL VL C	P	2007-12-20	2009-01-14
d	66 SH AMER EURO PAC GW CL C	P	2008-12-26	2009-01-14
e	965 397 SH AMER EURO PAC GW CL C	P	2007-12-13	2009-01-14

(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 135			135
b 1,331		1,634	-303
c 23,829		47,769	-23,940
d 1,687		1,747	-60
e 24,680		48,798	-24,118

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			135
b			-303
c			-23,940
d			-60
e			-24,118

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	-48,286
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	-363

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			
2007			
2006			
2005			
2004			

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

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 VIExcise 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 letter if necessary—see instructions)			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	2,321
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	2,321
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5		Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	2,321
6		Credits/Payments			
a		2009 estimated tax payments and 2008 overpayment credited to 2009	6a	5,600	
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	5,600
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	3,279
11		Enter the amount of line 10 to be Credited to 2010 estimated tax ☐ 2,360	Refunded ☐	11	919

Part VII-AStatements Regarding Activities

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?		Yes	No
		1a		No
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)?			No
	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		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ _____ (2) On foundation managers ☐ \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		No
	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?.	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?.	4b		No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
	If "Yes," attach the statement required by General Instruction T.			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			
	• By language in the governing instrument, or			
	• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
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	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ☐ CA _____			
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	Yes	
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		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

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 page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of DAVID L PERI CPA Telephone no (805) 563-1049 Located at 360 S HOPE AVE SUITE C300 SANTA BARBARA CA ZIP+4 93105			
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)?. Organizations relying on a current notice regarding disaster assistance check here.	1b		No
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		No
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 20____, 20____, 20____, 20____			
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		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20____, 20____, 20____, 20____			
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		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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 page 22 of the 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 page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	5b		No
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? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>			
	☐ Yes ☒ No			
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? <i>If "Yes" to 6b, file Form 8870.</i>	6b		No
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		No

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
See Additional Data Table				
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
NONE				
Total number of other employees paid over \$50,000.				

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

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 THE FOUNDATION LIMITS ITS ACTIVITIES TO GRANTMAKING AND CORRESPONDENCE WITH CURRENT AND PAST GRANTEES. TWENTY-ONE GRANTS WERE MADE THIS YEAR, AFTER CONSIDERING MANY REQUESTS.	91,393
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	
2	
All other program-related investments. See page 24 of the instructions.	
3	
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	697,876
b	Average of monthly cash balances.	1b	546,672
c	Fair market value of all other assets (see page 24 of the instructions).	1c	719,715
d	Total (add lines 1a, b, and c).	1d	1,964,263
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	
3	Subtract line 2 from line 1d.	3	1,964,263
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	29,464
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,934,799
6	Minimum investment return. Enter 5% of line 5.	6	96,740

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	96,740
2a	Tax on investment income for 2009 from Part VI, line 5.	2a	2,321
b	Income tax for 2009 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,321
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	94,419
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	94,419
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	94,419

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	91,393
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	91,393
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	91,393
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			
2	Undistributed income, if any, as of the end of 2008			
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.			94,419
b	From 2005.			
c	From 2006.			
d	From 2007.			
e	From 2008.			
f	Total of lines 3a through e.	9,933		
4	Qualifying distributions for 2009 from Part XII, line 4 ➤ \$ 91,393			
a	Applied to 2008, but not more than line 2a			
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). . .	0		
d	Applied to 2009 distributable amount.			91,393
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	6,907		
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.			0
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.			
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. . . .			

Part XIV

Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

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 organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2009	(b) 2008	(c) 2007	(d) 2006	
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 organization had \$5,000 or more in assets at any time during the year—see page 27 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))

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

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 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

RICHARD PARKER
535 QUINCY MAIL CENTER
CAMBRIDGE, MA 02138
(805) 563-1049

b

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

BRIEF DESCRIPTION OF PROGRAM, AMOUNT, AND COPY OF EXEMPTION LETTER

c

Any submission deadlines

NONE

d

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

NONE

Form 990-PF (2009)

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 Additional Data Table				
Total			3a	66,500
b Approved for future payment				
Total			3b	

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			14	10,365	
4 Dividends and interest from securities. . . .			14	4,747	
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	-48,286	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a ROYALTY INCOME _____			15	149,795	
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e). .				116,621	
13 Total. Add line 12, columns (b), (d), and (e).			13		116,621

[illegible]

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)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

[illegible]

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

b If "Yes," complete the following schedule		
(a) Name of organization	(b) Type of organization	(c) Description of relationship

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			
*****		2010-05-28	*****
Signature of officer or trustee		Date	Title

Paid Preparer's Use Only	Preparer's Signature	DAVID L PERI	Date	Check if self-employed ☐	Preparer's identifying number (see Signature on page 30 of the instructions)
	Firm's name (or yours if self-employed), address, and ZIP code			EIN	
	PERI & ALVARADO CPAs INC 360 S HOPE AVENUE SUITE C300 SANTA BARBARA, CA 93105			Phone no (805) 563-1049	

Additional Data

Software ID: 09000047
Software Version:
EIN: 95-2644098
Name: SUNFLOWER FOUNDATION

Form 990PF Part VIII Line 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
LIZ SAVAGE	Director 0 00	0		
3041 SEDGWICK ST NW WASHINGTON,DC 20008				
MICHAEL ANSARA	Director 0 00	0		
225 LOWELL RD CARLISLE,MA 01741				
ROBIN WRIGHT	Executive Direc 0 00	45,000		
535 QUINCY MAIL CTR CAMBRIDGE,MA 02138				
DAVID L PERI	SECRETARY/TREAS 0 00	0		
4878 VIEJA DR SANTA BARBARA,CA 93110				
RICHARD PARKER	PRESIDENT 0 00	0		
HARVARD UNIVERSITY CAMBRIDGE,MA 02138				

Form 990PF Part XV Line 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				
THE INSTITUTE FOR LOCAL SELF-RELIAN1313 5TH STREET SE MINNEAPOLIS,MN 55414	NONE	PUBLIC	TO SUPPORT THEIR BRING BANK BACK HOME PROGRAM-RESEARCH REPORTS ON FINANCIAL SYSTEMS & OUR CURRENT ECONOMIC CRISIS THAT LEAD TO A NATIONAL & INTERNATIONAL DISCUSSION OF A HUMANLY-SCALED FINANCIAL SYSTEM TO REDUCE SYSTEMIC RISK & STRENGTHEN LOCAL & REGIONAL ECONOMIES	2,000
ORGANIZING LEADERSHIP TRAINING CENT1773 DORCHESTER AVENUE DORCHESTER,MA 02124	NONE	PUBLIC	TO SUPPORT THEIR COALITION & ORGANIZING WORK & LEADERSHIP TRAINING IN MASSACHUSETTS	2,000
WOMEN'S EARTH ALLIANCE2150 ALLSTON WAY SUITE 460 BERLKLEY,CA 94704	NONE	PUBLIC	SUPPORT OF WOMEN AND WATER INITIATIVE IN WEST AFRICA	2,500
EPISCOPAL CITY MISSION138 TREMONT STREET BOSTON,MA 02111	NONE		GENERAL SUPPORT	2,000
COMMON COUNSEL FOUNDATION 678 13TH STREET SUITE 100 OAKLAND,CA 94612	NONE	PUBLIC	TO SUPPORT A RETREAT CENTER FOR PROGRESSIVE AND ENVIRONMENTAL WRITERS	5,000
ADA EDUCATION FUND1625 K ST NW STE 210 WASHINGTON,DC 20006	NONE	PUBLIC	TO SUPPORT RESEARCH ON GROUP'S SOCIAL POLICY AGENDA	10,000
IDAHO RIVERS UNITEDPO BOX 633 BOISE,ID 83701	NONE	PUBLIC	TO SUPPORT THE BOISE RIVER CAMPAIGN, A PROJECT DESIGNED TO WIN ON-THE-GROUND PROTECTIONS FOR THE RIVER AND BUILD CONSTITUENCIES FOR RIVER CONSERVATION IN IDAHO	2,000
THE GIRLS AND BOYS PROJECTS 541 EAST 12TH ST NEW YORK,NY 10009	NONE	PUBLIC	TO SUPPORT THEIR USE OF DEMOCRATIC METHODS & CRITICAL THINKING SKILLS TO ADDRESS THE ROOT CAUSES OF SOCIETY'S PROBLEMS IN NYC GIRLS AND BOYS BETWEEN 10 - 18 YEARS OLD	1,000
BAY AREA WILDERNESS TRAINING 2301 BROADWAY SUITE B OAKLAND,CA 94612	NONE	PUBLIC	TO SUPPORT OUTDOOR EDUCATIONAL PROGRAMS FOR UNDERSERVED URBAN YOUTH IN THE BAY AREA	2,500
NATURAL RESOURCES DEFENSE COUNCIL40 WEST 20TH ST NEW YORK,NY 10011	NONE	PUBLIC	TO SUPPORT THEIR ONEARTH MAGAZINE AND ENVIRONMENTAL JOURNALISM	4,000
MASS IMMIGRANT REFUGEE ADVOC COALIT105 CHAUNCY ST 901 BOSTON,MA 02111	NONE	PUBLIC	TO SUPPORT THEIR "GIVE LIBERTY A HAND" CELEBRATION HONORING INDIVIDUALS WHO WORK TO PROTECT & PROMOTE THE RIGHTS & OPPORTUNITIES OF IMMIGRANTS AND REFUGEES	1,000
CULTURAL ORGANIZATION OF LOWELL375 MERRIMACK ST 3RD FLOOR LOWELL,MA 01852	NONE	PUBLIC	TO SUPPORT THE LOWELL POETRY FESTIVAL TO BRING ARTS TO A MAJOR THIRD-WORLD COMMUNITY	1,000
SHARED INTEREST121 W 27TH ST STE 805 NEW YORK,NY 10001	NONE	PUBLIC	TO SUPPORT THE NEXT DECADE DINNER IN MARCH 2010,PROCEEDS TO SUPPORT THEIR WORK TO ENABLE LOW-INCOME BLACK SOUTH AFRICANS GAIN ACCESS TO CAPITAL & TECHNICAL ASSISTANCE IN SOUTH AFRICA	2,000
THE HOPI FOUNDATIONPO BOX 301 KYKOTSMOVI,AZ 86039	none	public	TO SUPPORT THEIR LEADERSHIP & MENTORING PROGRAM	3,000
CAMP STEVENSPPO BOX 2320 JULIAN,CA 92036	none	public	TO SUPPORT THEIR 6-DAY SOCIAL & ENVRIONMENTAL JUSTICE SUMMER SESSION, HELPING TO FUND 10 REFUGEE CHILDREN TO ATTEND 2010 CAMP	2,000
Total  3a				66,500

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
CTR FOR COMMUNITY CHANGE1536 U ST NW WASHINGTON,DC 20009	none	public	TO SUPPORT A NATIONAL TRAINING PROGRAM FOR MINORITY COMMUNITY ORGANIZERS AND LEADERSHIP	5,000
ECONOMISTS FOR PEACE SECURITYPO BOX 5000 ANNANDALEONTHEHUD,NY 12504	none	public	FOR GENERAL SUPPORT, IN HONOR OF ANDY BRIMMER & DINNER PROGRAM LISTING	3,000
INTERFAITH WORKER JUSTICE1020 W BRYN MAWR AVE 4TH FLOOR CHICAGO,IL 60660	NONE	PUBLIC	TO SUPPORT THEIR NATIONAL CAMPAIGN ON WAGE THEFT	2,500
CHRIST CHURCHZERO GARDEN STREET CAMBRIDGE,MA 02138	NONE	PUBLIC	FOR GENERAL SUPPORT	1,000
EARTH ISLAND INSTITUTE2150 ALLSTON WAY STE 460 BERKELEY,CA 94704	NONE	PUBLIC	FOR GENERAL SUPPORT	3,000
ACLU FOUNDATION OF SO CALIF 1313 W 8TH STREET LOS ANGELES,CA 90017	NONE	PUBLIC	TO SUPPORT THEIR CONFERENCE ON INCOME INEQUALITY	10,000
Total			3a	66,500

TY 2009 Accounting Fees Schedule**Name:** SUNFLOWER FOUNDATION**EIN:** 95-2644098**Software ID:** 09000047**Software Version:** 2009v1.3

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ROGERS & ELSTON	5,850	5,850	0	0
PERI & ALVARADO	17,024	10,200	0	3,824

**TY 2009 Investments Corporate
Stock Schedule**

Name: SUNFLOWER FOUNDATION

EIN: 95-2644098

Software ID: 09000047

Software Version: 2009v1.3

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CLIFFS NAT RES INC COM	28,250	13,827

TY 2009 Investments - Other Schedule

Name: SUNFLOWER FOUNDATION

EIN: 95- 2644098

Software ID: 09000047

Software Version: 2009v1.3

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
FIDELITY CASH RESERVES MUTUAL FD	AT COST	567,191	567,191

TY 2009 Land, Etc. Schedule

Name: SUNFLOWER FOUNDATION

EIN: 95- 2644098

Software ID: 09000047

Software Version: 2009v1.3

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Machinery and Equipment	7,999	7,999		

TY 2009 Other Expenses Schedule

Name: SUNFLOWER FOUNDATION

EIN: 95-2644098

Software ID: 09000047

Software Version: 2009v1.3

Description	Revenue and Expenses per Books	Net Invest ment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SUBSCRIPTIONS	472			472
OFFICE EXPENSES	159			
LICENSES & FEES	20			
INSURANCE	2,011	1,006		1,005
BANK CHARGES	166			
Amortization	21,836	21,836		

TY 2009 Other Income Schedule

Name: SUNFLOWER FOUNDATION

EIN: 95-2644098

Software ID: 09000047

Software Version: 2009v1.3

Description	Revenue And Expenses Per Books	Net Invest ment Income	Adjusted Net Income
ROYALTY INCOME	149,795	149,795	149,795

TY 2009 Other Professional Fees Schedule

Name: SUNFLOWER FOUNDATION

EIN: 95-2644098

Software ID: 09000047

Software Version: 2009v1.3

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MERRILL LYNCH	150	150	0	0

TY 2009 Taxes Schedule**Name:** SUNFLOWER FOUNDATION**EIN:** 95-2644098**Software ID:** 09000047**Software Version:** 2009v1.3

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
US TREASURY	6,194			
PAYROLL TAXES	3,980	796		1,592
FRANCHISE TAX BOARD	10			
CA DEPT OF JUSTICE	75			