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Return of Organization Exempt From Income Tax

2009

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code
(except black lung benefit trust or private foundation)Department of the Treasury
Internal Revenue Service

The organization may have to use a copy of this return to satisfy state reporting requirements.

Open to Public Inspection

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

B Check if applicable: ☐ Address change ☐ Name change ☐ Initial return ☐ Termination ☐ Amended return ☐ Application pending	C Please use IRS label or print or type. See specific instructions. COMMUNITY FOUNDATION OF THE JEWISH FEDERATION OF ORANGE COUNTY 1 FEDERATION WAY #210 IRVINE, CA 92603	D Employer Identification Number 95-3645825
		E Telephone number 949 435-3490
F Name and address of principal officer MYRNA SHIELDS SAME AS C ABOVE		G Gross receipts \$ 13,209,889.
I Tax-exempt status ☒ 501(c) (3) (insert no) ☐ 4947(a)(1) or ☐ 527		H(a) Is this a group return for affiliates? ☐ Yes ☒ No H(b) Are all affiliates included? ☐ Yes ☐ No If 'No,' attach a list (see instructions)
J Website: WWW.FOUNDATIONJFLOC.ORG		H(c) Group exemption number
K Form of organization ☒ Corporation ☐ Trust ☐ Association ☐ Other		L Year of Formation 1981 M State of legal domicile CA

Part I Summary

Activities & Governance	1 Briefly describe the organization's mission or most significant activities <u>ACQUIRE, MANAGE, ADMINISTER, AND EXPEND FUNDS FOR CHARITABLE PURPOSES AND TO SUPPORT OTHER 501(C)(3) ORGANIZATIONS.</u>			
	2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its assets			
	3	Number of voting members of the governing body (Part VI, line 1a)	25	
	4	Number of independent voting members of the governing body (Part VI, line 1b)	25	
	5	Total number of employees (Part V, line 2a)	3	
	6	Total number of volunteers (estimate if necessary)	0	
	7a	Total gross unrelated business revenue from Part VIII, column (C), line 12	0.	
7b	Net unrelated business taxable income from Form 990-T, line 34	0.		
Revenue	8	Contributions and grants (Part VIII, line 1a)	Prior Year 1,824,837.	Current Year 2,049,377.
	9	Program service revenue (Part VIII, line 2g)		
	10	Investment income (Part VIII, column (A), lines 3, 6, and 7d)	8,711.	-1,787,659.
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8, 9c, 10c, and 11e)	5,584.	2,957,914.
	12	Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)	1,839,132.	3,219,632.
	13	Grants and similar amounts (Part IX, column (A), lines 1-3)	40,974,480.	3,372,663.
	14	Benefits paid to or for members (Part IX, column (A), line 4)		
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)	40,974,480.	172,800.
	16a	Professional fundraising fees (Part IX, column (A), line 11e)		
	16b	Total fundraising expenses (Part IX, column (D), line 25)	78,043.	
Expenses	17	Other expenses (Part IX, column (A), lines 11a-11d, 11f-24f)	27,305,485.	164,837.
	18	Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)	109,254,445.	3,710,300.
	19	Revenue less expenses. Subtract line 18 from line 12	-107,415,313.	-490,668.
	20	Total assets (Part X, line 16)	Beginning of Year 27,305,485.	End of Year 27,006,096.
Net Assets or Fund Balances	21	Total liabilities (Part X, line 26)	12,509,677.	12,700,956.
	22	Net assets or fund balances. Subtract line 21 from line 20	14,795,808.	14,305,140.

Part II Signature Block

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.	
	Signature of officer <u>David B. Lang</u> DAVID LANG Type or print name and title	Date <u>8/6/2010</u> TREASURER
Paid Preparer's Use Only	Preparer's signature <u>Judith A. Rosenthal</u> Firm's name (or yours if self-employed), address, and ZIP + 4 JUDITH A. ROSENTHAL, CPA 6609 N. SCOTTSDALE RD. SUITE 108 SCOTTSDALE, AZ 85250	Date <u>8/2/10</u> Check if self-employed ☒ Preparer's identifying number (see instructions) <u>N/A</u> EIN <u>N/A</u> Phone no <u>(480) 361-4949</u>

May the IRS discuss this return with the preparer shown above? (see instructions)

☒ Yes ☐ No

BAA For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

TEEA0113L 12/29/09 Form 990 (2009)

SCANNED AUG 27 2010

8/17/10

Part III Statement of Program Service Accomplishments

- 1 Briefly describe the organization's mission:

ACQUIRE, MANAGE, ADMINISTER, AND EXPEND FUNDS FOR CHARITABLE PURPOSES AND TO SUPPORT
OTHER 501(C)(3) ORGANIZATIONS.

- 2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?

☐ Yes ☒ No

If 'Yes,' describe these new services on Schedule O.

- 3 Did the organization cease conducting, or make significant changes in how it conducts, any program services?

☐ Yes ☒ No

If 'Yes,' describe these changes on Schedule O.

- 4 Describe the exempt purpose achievements for each of the organization's three largest program services by expenses. Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a (Code:) (Expenses \$ 3,445,952. including grants of \$ 3,372,663.) (Revenue \$ 3,146,343.)

TO ACQUIRE, MANAGE, ADMINISTER AND EXPEND FUNDS FOR CHARITABLE PURPOSES, INCLUDING
ASSISTANCE AND SUPPPORT OF 501(C)(3) ORGANIZATIONS, ASSOCIATIONS AND UNDERTAKINGS.

4b (Code:) (Expenses \$ including grants of \$) (Revenue \$)4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)

4d Other program services (Describe in Schedule O.)

(Expenses \$ including grants of \$) (Revenue \$)

4e Total program service expenses ▶ 3,445,952.

Part IV Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If 'Yes,' complete Schedule A	X	
2 Is the organization required to complete Schedule B, Schedule of Contributors?	X	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If 'Yes,' complete Schedule C, Part I		X
4 Section 501(c)(3) organizations Did the organization engage in lobbying activities? If 'Yes,' complete Schedule C, Part II		X
5 Section 501(c)(4), 501(c)(5), and 501(c)(6) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? If 'Yes,' complete Schedule C, Part III		
6 Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If 'Yes,' complete Schedule D, Part I	X	
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? If 'Yes,' complete Schedule D, Part II		X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If 'Yes,' complete Schedule D, Part III		X
9 Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If 'Yes,' complete Schedule D, Part IV		X
10 Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? If 'Yes,' complete Schedule D, Part V		X
11 Is the organization's answer to any of the following questions 'Yes'? If so, complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable	X	
• Did the organization report an amount for land, buildings and equipment in Part X, line 10? If 'Yes,' complete Schedule D, Part VI		
• Did the organization report an amount for investments— other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VII		
• Did the organization report an amount for investments— program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part VIII		
• Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If 'Yes,' complete Schedule D, Part IX		
• Did the organization report an amount for other liabilities in Part X, line 25? If 'Yes,' complete Schedule D, Part X		
• Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48? If 'Yes,' complete Schedule D, Part X		
12 Did the organization obtain separate, independent audited financial statement for the tax year? If 'Yes,' complete Schedule D, Parts XI, XII, and XIII	X	
12A Was the organization included in consolidated, independent audited financial statement for the tax year? If 'Yes,' completing Schedule D, Parts XI, XII, and XIII is optional	Yes	No
		X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If 'Yes,' complete Schedule E		X
14a Did the organization maintain an office, employees, or agents outside of the United States?		X
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? If 'Yes,' complete Schedule F, Part I		X
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the United States? If 'Yes,' complete Schedule F, Part II		X
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the United States? If 'Yes,' complete Schedule F, Part III		X
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If 'Yes,' complete Schedule G, Part I		X
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If 'Yes,' complete Schedule G, Part II		X
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If 'Yes,' complete Schedule G, Part III		X
20 Did the organization operate one or more hospitals? If 'Yes,' complete Schedule H		X

Part IV Checklist of Required Schedules (continued)

		Yes	No
21	Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? <i>If 'Yes,' complete Schedule I, Parts I and II</i>	X	
22	Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If 'Yes,' complete Schedule I, Parts I and III</i>		X
23	Did the organization answer 'Yes' to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If 'Yes,' complete Schedule J</i>		X
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, and that was issued after December 31, 2002? <i>If 'Yes,' answer lines 24b through 24d and complete Schedule K. If 'No,' go to line 25</i>		X
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?		
d	Did the organization act as an 'on behalf of' issuer for bonds outstanding at any time during the year?		
25a	Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If 'Yes,' complete Schedule L, Part I</i>		X
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If 'Yes,' complete Schedule L, Part I</i>		X
26	Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If 'Yes,' complete Schedule L, Part II</i>		X
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? <i>If 'Yes,' complete Schedule L, Part III</i>		X
28	Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)		
a	A current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
b	A family member of a current or former officer, director, trustee, or key employee? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
c	An entity of which a current or former officer, director, trustee, or key employee of the organization (or a family member) was an officer, director, trustee, or direct or indirect owner? <i>If 'Yes,' complete Schedule L, Part IV</i>		X
29	Did the organization receive more than \$25,000 in non-cash contributions? <i>If 'Yes,' complete Schedule M</i>		X
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If 'Yes,' complete Schedule M</i>		X
31	Did the organization liquidate, terminate, or dissolve and cease operations? <i>If 'Yes,' complete Schedule N, Part I</i>		X
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If 'Yes,' complete Schedule N, Part II</i>		X
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If 'Yes,' complete Schedule R, Part I</i>		X
34	Was the organization related to any tax-exempt or taxable entity? <i>If 'Yes,' complete Schedule R, Parts II, III, IV, and V, line 1</i>		X
35	Is any related organization a controlled entity within the meaning of section 512(b)(13)? <i>If 'Yes,' complete Schedule R, Part V, line 2</i>		X
36	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If 'Yes,' complete Schedule R, Part V, line 2</i>		X
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If 'Yes,' complete Schedule R, Part VI</i>		X
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? Note. All Form 990 filers are required to complete Schedule O	X	

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Form 990 (2009)

Part V Statements Regarding Other IRS Filings and Tax Compliance

		Yes	No
1 a	Enter the number reported in Box 3 of form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter -0- if not applicable.		
1 b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable.		
1 c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	
2 a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return.		
2 b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file this return. (see instructions)	X	
3 a	Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?		X
3 b	If 'Yes,' has it filed a Form 990-T for this year? If 'No,' provide an explanation in Schedule O.		
4 a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		X
4 b	If 'Yes,' enter the name of the foreign country: _____ See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
5 a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		X
5 b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
5 c	If 'Yes,' to line 5a or 5b, did the organization file Form 8886-T, Disclosure by Tax-Exempt Entity Regarding Prohibited Tax Shelter Transaction?		
6 a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?		X
6 b	If 'Yes,' did the organization include with every solicitation an express statement that such contributions or gifts were not deductible?		
7	Organizations that may receive deductible contributions under section 170(c).		
7 a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?		X
7 b	If 'Yes,' did the organization notify the donor of the value of the goods or services provided?		
7 c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		X
7 d	If 'Yes,' indicate the number of Forms 8282 filed during the year.		
7 e	Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
7 f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		X
7 g	For all contributions of qualified intellectual property, did the organization file Form 8899 as required?		
7 h	For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?		
8	Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		X
9	Sponsoring organizations maintaining donor advised funds.		
9 a	Did the organization make any taxable distributions under section 4966?		
9 b	Did the organization make any distribution to a donor, donor advisor, or related person?		X
10	Section 501(c)(7) organizations. Enter.		
10 a	Initiation fees and capital contributions included on Part VIII, line 12.		
10 b	Gross Receipts, included on Form 990, Part VIII, line 12, for public use of club facilities.		
11	Section 501(c)(12) organizations. Enter.		
11 a	Gross income from other members or shareholders.		
11 b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them).		
12 a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?		
12 b	If 'Yes,' enter the amount of tax-exempt interest received or accrued during the year.		

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Form 990 (2009)

Part VI

Governance, Management and Disclosure For each 'Yes' response to lines 2 through 7b below, and for a 'No' response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

Section A. Governing Body and Management

	Yes	No
1a Enter the number of voting members of the governing body	25	
1b Enter the number of voting members that are independent	25	
2 Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee or key employee? SEE SCHEDULE O	X	
3 Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?		X
4 Did the organization make any significant changes to its organizational documents since the prior Form 990 was filed?		X
5 Did the organization become aware during the year of a material diversion of the organization's assets?		X
6 Does the organization have members or stockholders?		X
7a Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?		X
7b Are any decisions of the governing body subject to approval by members, stockholders, or other persons?		X
8 Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a The governing body?	X	
b Each committee with authority to act on behalf of the governing body?	X	
9 Is there any officer, director or trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? <i>If 'Yes,' provide the names and addresses in Schedule O</i>		X

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)

	Yes	No
10a Does the organization have local chapters, branches, or affiliates?		X
10b If 'Yes,' does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?		
11 Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?	X	
11A Describe in Schedule O the process, if any, used by the organization to review this Form 990 SEE SCHEDULE O		
12a Does the organization have a written conflict of interest policy? <i>If 'No,' go to line 13</i>	X	
12b Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	X	
12c Does the organization regularly and consistently monitor and enforce compliance with the policy? <i>If 'Yes,' describe in Schedule O how this is done</i> SEE SCHEDULE O	X	
13 Does the organization have a written whistleblower policy?	X	
14 Does the organization have a written document retention and destruction policy?	X	
15 Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?		
a The organization's CEO, Executive Director, or top management official SEE SCHEDULE O	X	
b Other officers of key employees of the organization SEE SCHEDULE O	X	
If 'Yes' to line 15a or 15b, describe the process in Schedule O (See instructions)		
16a Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?		X
16b If 'Yes,' has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?		

Section C. Disclosures

17 List the states with which a copy of this Form 990 is required to be filed ► CA

18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.
☐ Own website ☐ Another's website ☒ Upon request

19 Describe in Schedule O whether (and if so, how) the organization makes its governing documents, conflict of interest policy, and financial statements available to the public **SEE SCHEDULE O**

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization
 ► JUDITH A. ROSENTHAL 6609 N. SCOTTSDALE RD. STE. 108 SCOTTSDALE AZ 85250 480 361-4949

Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees**

1 a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year. Use Schedule J-2 if additional space is needed.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees. See instructions for definition of 'key employees.'
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

☐ Check this box if the organization did not compensate any current officer, director, or trustee

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
HOWARD BLOCK DIRECTOR	1	X						0.	0.	0.
MICHAEL GORDON DIRECTOR	1	X						0.	0.	0.
IRVING BURG DIRECTOR	1	X						0.	0.	0.
JOHN RAU DIRECTOR	1	X						0.	0.	0.
JASON ROSIAK DIRECTOR	1	X						0.	0.	0.
HENRY SCHRIMMER DIRECTOR	1	X						0.	0.	0.
DAVID FISHMAN DIRECTOR	1	X						0.	0.	0.
ALLEN FAINBARG DIRECTOR	1	X						0.	0.	0.
ROBERT BAIRD DIRECTOR	1	X						0.	0.	0.
JON FEDER DIRECTOR	1	X						0.	0.	0.
SOL ZECHTER DIRECTOR	1	X						0.	0.	0.
STANLEY SACKLER DIRECTOR	1	X						0.	0.	0.
SUSAN GLASS DIRECTOR	1	X						0.	0.	0.
LAUREN KLEIN SECRETARY	1	X		X				0.	0.	0.
DAVID LANG TREASURER	1	X		X				0.	0.	0.
GIDEON BERNSTEIN PRESIDENT & CEO	3	X		X				0.	0.	0.
KATE KING DIRECTOR	1	X						0.	0.	0.

Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (cont.)

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional trustee	Officer	Key employee	Highest compensated employee	Former			
STEVEN FAINBARG DIRECTOR	1	X						0.	0.	0.
LINDA SCHULEIN DIRECTOR	1	X						0.	0.	0.
RALPH STERN DIRECTOR	1	X						0.	0.	0.
GARY BRAHM DIRECTOR	1	X						0.	0.	0.
PEGGY FEDER DIRECTOR	1	X						0.	0.	0.
RICHARD GOLLIS DIRECTOR	1	X						0.	0.	0.
SIMON PEARLMAN DIRECTOR	1	X						0.	0.	0.
MYRNA SHIELDS ADMIN. DIRECTOR	40			X	X			86,400.	0.	0.
BARRY FRIEDMAN DEVELOPMENT DIR	40			X	X			17,500.	0.	0.
1 b Total								103,900.	0.	0.

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 in reportable compensation from the organization **0**

3 Did the organization list any **former** officer, director or trustee, key employee, or highest compensated employee on line 1a? If 'Yes,' complete Schedule J for such individual

	Yes	No
3		X
4		X
5		X

4 For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? If 'Yes,' complete Schedule J for such individual

5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? If 'Yes,' complete Schedule J for such person

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization

(A) Name and business address	(B) Description of Services	(C) Compensation

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization **0**

Part VIII Statement of Revenue

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
CONTRIBUTIONS, GIFTS, GRANTS AND OTHER SIMILAR AMOUNTS	1a Federated campaigns	1a 1,895,539.				
	b Membership dues	1b				
	c Fundraising events	1c				
	d Related organizations	1d				
	e Government grants (contributions)	1e				
	f All other contributions, gifts, grants, and similar amounts not included above	1f 153,838.				
	g Noncash contribns included in lns 1a-1f.	\$				
h Total. Add lines 1a-1f			2,049,377.			
PROGRAM SERVICE REVENUE	Business Code					
	2a -----					
	b -----					
	c -----					
	d -----					
	e -----					
	f All other program service revenue					
g Total. Add lines 2a-2f						
OTHER REVENUE	3 Investment income (including dividends, interest and other similar amounts)		618,565.			618,565.
	4 Income from investment of tax-exempt bond proceeds					
	5 Royalties					
	6a Gross Rents					
	b Less rental expenses					
	c Rental income or (loss)					
	d Net rental income or (loss)					
	7a Gross amount from sales of assets other than inventory					
	b Less cost or other basis and sales expenses					
	c Gain or (loss)					
	d Net gain or (loss)		-2,406,224.			-2,406,224.
	8a Gross income from fundraising events (not including \$ of contributions reported on line 1c) See Part IV, line 18					
	b Less direct expenses					
	c Net income or (loss) from fundraising events					
	9a Gross income from gaming activities See Part IV, line 19					
	b Less direct expenses					
	c Net income or (loss) from gaming activities					
	10a Gross sales of inventory, less returns and allowances					
b Less cost of goods sold						
c Net income or (loss) from sales of inventory						
Miscellaneous Revenue		Business Code				
11a UNREALIZED GAIN-INVEST.			4,899,703.			4,899,703.
b DONOR DESIGNATED INV. INC			-195,017.			-195,017.
c DONOR DES. CAP LOSS ALLOC			-1,746,772.			-1,746,772.
d All other revenue						
e Total. Add lines 11a-11d			2,957,914.			
12 Total revenue. See instructions			3,219,632.	0.	0.	1,170,255.

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

<i>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</i>	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21	3,372,663.	3,372,663.		
2 Grants and other assistance to individuals in the U.S. See Part IV, line 22				
3 Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	103,900.	0.	64,800.	39,100.
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0.	0.	0.	0.
7 Other salaries and wages	35,700.		26,775.	8,925.
8 Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	10,184.		7,638.	2,546.
9 Other employee benefits	12,337.		8,142.	4,195.
10 Payroll taxes	10,679.		7,048.	3,631.
11 Fees for services (non-employees)				
a Management				
b Legal				
c Accounting	32,400.		32,400.	
d Lobbying				
e Prof fundraising svcs. See Part IV, ln 17				
f Investment management fees	73,289.	73,289.		
g Other	2,970.		2,970.	
12 Advertising and promotion				
13 Office expenses				
14 Information technology	7,544.		5,054.	2,490.
15 Royalties				
16 Occupancy	9,077.		5,991.	3,086.
17 Travel	159.		105.	54.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	4,090.		4,090.	
23 Insurance				
24 Other expenses. Itemize expenses not covered above. (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below.)				
a INSURANCE/FEES	9,302.		6,202.	3,100.
b AUDIT	8,500.		8,500.	
c POSTAGE AND SHIPPING	3,715.		1,226.	2,489.
d BANK CHARGES	3,642.		1,202.	2,440.
e MARKETING	3,274.			3,274.
f All other expenses	6,875.		4,162.	2,713.
25 Total functional expenses. Add lines 1 through 24f	3,710,300.	3,445,952.	186,305.	78,043.
26 Joint costs. Check here ☒ if following SOP 98-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

BAA

Form 990 (2009)

Part X Balance Sheet

		(A) Beginning of year		(B) End of year
ASSETS	1 Cash — non-interest-bearing		1	
	2 Savings and temporary cash investments	10,186,768.	2	8,076,876.
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net	31,181.	4	31,254.
	5 Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L		5	
	6 Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L		6	
	7 Notes and loans receivable, net		7	
	8 Inventories for sale or use		8	
	9 Prepaid expenses and deferred charges		9	
	10a Land, buildings, and equipment cost or other basis. Complete Part VI of Schedule D	10a 55,875.		
	b Less: accumulated depreciation	10b 42,654.	7,280.	10c 13,221.
	11 Investments — publicly-traded securities	16,798,470.	11	18,601,046.
	12 Investments — other securities. See Part IV, line 11		12	
	13 Investments — program-related. See Part IV, line 11		13	
	14 Intangible assets		14	
	15 Other assets. See Part IV, line 11	281,786.	15	283,699.
16 Total assets. Add lines 1 through 15 (must equal line 34).	27,305,485.	16	27,006,096.	
LIABILITIES	17 Accounts payable and accrued expenses	1,979.	17	11,391.
	18 Grants payable	9,500.	18	1,800.
	19 Deferred revenue		19	
	20 Tax-exempt bond liabilities		20	
	21 Escrow or custodial account liability. Complete Part IV of Schedule D		21	
	22 Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L		22	
	23 Secured mortgages and notes payable to unrelated third parties		23	
	24 Unsecured notes and loans payable to unrelated third parties		24	
	25 Other liabilities. Complete Part X of Schedule D	12,498,198.	25	12,687,765.
	26 Total liabilities. Add lines 17 through 25.	12,509,677.	26	12,700,956.
NET ASSETS OR FUND BALANCES	Organizations that follow SFAS 117, check here ☒ and complete lines 27 through 29 and lines 33 and 34.			
	27 Unrestricted net assets	11,546,274.	27	10,282,888.
	28 Temporarily restricted net assets	2,937,290.	28	3,403,358.
	29 Permanently restricted net assets	312,244.	29	618,894.
	Organizations that do not follow SFAS 117, check here ☐ and complete lines 30 through 34.			
	30 Capital stock or trust principal, or current funds		30	
	31 Paid-in or capital surplus, or land, building, and equipment fund		31	
	32 Retained earnings, endowment, accumulated income, or other funds		32	
	33 Total net assets or fund balances	14,795,808.	33	14,305,140.
	34 Total liabilities and net assets/fund balances.	27,305,485.	34	27,006,096.

BAA

Form 990 (2009)

Part XI Financial Statements and Reporting1 Accounting method used to prepare the Form 990 ☐ Cash ☒ Accrual ☐ Other

If the organization changed its method of accounting from a prior year or checked 'Other,' explain in Schedule O

2a Were the organization's financial statements compiled or reviewed by an independent accountant?

b Were the organization's financial statements audited by an independent accountant?

c If 'Yes' to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?

If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O

d If 'Yes' to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a consolidated basis, separate basis, or both:

☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis

3a As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?

b If 'Yes,' did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits

Yes No

2a X

2b X

2c X

3a X

3b

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Form 990 (2009)

SCHEDULE A
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

► Attach to Form 990 or Form 990-EZ. ► See separate instructions.

OMB No 1545-0047

2009

Open to Public
Inspection

Name of the organization **COMMUNITY FOUNDATION OF THE JEWISH
FEDERATION OF ORANGE COUNTY**

Employer identification number
95-3645825

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions

The organization is not a private foundation because it is (For lines 1 through 11, check only one box.)

- 1 ☐ A church, convention of churches or association of churches described in **section 170(b)(1)(A)(i)**.
- 2 ☐ A school described in **section 170(b)(1)(A)(ii)**. (Attach Schedule E.)
- 3 ☐ A hospital or cooperative hospital service organization described in **section 170(b)(1)(A)(iii)**.
- 4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii)**. Enter the hospital's name, city, and state _____
- 5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv)**. (Complete Part II.)
- 6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v)**.
- 7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 8 ☐ A community trust described in **section 170(b)(1)(A)(vi)**. (Complete Part II.)
- 9 ☐ An organization that normally receives (1) more than 33-1/3 % of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions – subject to certain exceptions, and (2) no more than 33-1/3 % of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See **section 509(a)(2)**. (Complete Part III.)
- 10 ☐ An organization organized and operated exclusively to test for public safety. See **section 509(a)(4)**.
- 11 ☒ An organization organized and operated exclusively for the benefit of, to perform the functions of, or carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See **section 509(a)(3)**. Check the box that describes the type of supporting organization and complete lines 11e through 11h.
- a ☒ Type I b ☐ Type II c ☐ Type III – Functionally integrated d ☐ Type III – Other
- e ☒ By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).
- f ☐ If the organization received a written determination from the IRS that is a Type I, Type II or Type III supporting organization, check this box.
- g Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

- (i) a person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization?
- (ii) a family member of a person described in (i) above?
- (iii) a 35% controlled entity of a person described in (i) or (ii) above?

	Yes	No
11 g (i)		X
11 g (ii)		X
11 g (iii)		X

h Provide the following information about the supported organizations

(i) Name of Supported Organization	(ii) EIN	(iii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) Is the organization in col (i) listed in your governing document?		(v) Did you notify the organization in col (i) of your support?		(vi) Is the organization in col (i) organized in the U.S.?		(vii) Amount of Support
			Yes	No	Yes	No	Yes	No	
SEE ATTACHED ST. 1 OF ALLOCATIONS									
		501 (C) (3)	X						3,372,663.
Total									3,372,663.

BAA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Schedule A (Form 990 or 990-EZ) 2009

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions and membership fees received. (Do not include 'unusual grants'.)						
2 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf						
3 The value of services or facilities furnished to the organization by a governmental unit without charge. Do not include the value of services or facilities generally furnished to the public without charge.						
4 Total. Add lines 1-through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 Public support. Subtract line 5 from line 4						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
11 Total support. Add lines 7 through 10						
12 Gross receipts from related activities, etc. (see instructions)					12	
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here. ▶ ☐						

Section C. Computation of Public Support Percentage

14 Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f))	14	%
15 Public support percentage from 2008 Schedule A, Part II, line 14	15	%
16a 33-1/3 support test – 2009. If the organization did not check the box on line 13, and the line 14 is 33-1/3 % or more, check this box and stop here. The organization qualifies as a publicly supported organization. ▶ ☐		
b 33-1/3 support test – 2008. If the organization did not check a box on line 13, or 16a, and line 15 is 33-1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization. ▶ ☐		
17a 10%-facts-and-circumstances test – 2009 If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and stop here. Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization. ▶ ☐		
b 10%-facts-and-circumstances test – 2008. If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the 'facts-and-circumstances' test, check this box and stop here. Explain in Part IV how the organization meets the 'facts-and-circumstances' test. The organization qualifies as a publicly supported organization. ▶ ☐		
18 Private foundation. If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions. ▶ ☐		

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Schedule A (Form 990 or 990-EZ) 2009

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I.)

Section A. Public Support

Calendar year (or fiscal yr beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
1 Gifts, grants, contributions and membership fees received. (Do not include 'unusual grants'.)						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in a activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public support (Subtract line 7c from line 6.)						

Section B. Total Support

Calendar year (or fiscal yr beginning in) ▶	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included on line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 Total support. (add lines 9, 10c, 11, and 12.)						
14 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here ☐						

Section C. Computation of Public Support Percentage

15 Public support percentage for 2009 (line 8, column (f) divided by line 13, column (f))	15	%
16 Public support percentage from 2008 Schedule A, Part III, line 15	16	%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f))	17	%
18 Investment income percentage from 2008 Schedule A, Part III, line 17	18	%
19a 33-1/3 support tests — 2009. If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ☐		
b 33-1/3 support tests — 2008. If the organization did not check a box on line 14 or 19a, and line 16 is more than 33-1/3%, and line 18 is not more than 33-1/3%, check this box and stop here. The organization qualifies as a publicly supported organization ☐		
20 Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ☐		

Part IV **Supplemental Information.** Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Provide any other additional information. See instructions.

This image shows a blank sheet of white paper with horizontal dashed lines. The lines are evenly spaced and run across the width of the page, providing a guide for handwriting practice. There are no other markings, text, or illustrations on the page.

**SCHEDULE D
(Form 990)**Department of the Treasury
Internal Revenue Service**Supplemental Financial Statements**

- Complete if the organization answered 'Yes,' to Form 990,
Part IV, lines 6, 7, 8, 9, 10, 11, or 12.
► Attach to Form 990. ► See separate instructions

OMB No 1545-0047

2009**Open to Public
Inspection**

Name of the organization

COMMUNITY FOUNDATION OF THE JEWISH
FEDERATION OF ORANGE COUNTY

Employer identification number

95-3645825

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts Complete if
the organization answered 'Yes' to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1 Total number at end of year	359	
2 Aggregate contributions to (during year)	1,839,502.	
3 Aggregate grants from (during year)	3,358,763.	
4 Aggregate value at end of year	12,513,203.	

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☒ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor or for any other purpose conferring impermissible private benefit? ☒ Yes ☐ No

Part II Conservation Easements Complete if the organization answered 'Yes' to Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply)

☐ Preservation of land for public use (e.g., recreation or pleasure)	☐ Preservation of an historically important land area
☐ Protection of natural habitat	☐ Preservation of certified historic structure
☐ Preservation of open space	

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

	Held at the End of the Year
a Total number of conservation easements	2a
b Total acreage restricted by conservation easements	2b
c Number of conservation easements on a certified historic structure included in (a).	2c
d Number of conservation easements included in (c) acquired after 8/17/06	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ► _____

4 Number of states where property subject to conservation easement is located ► _____

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easement it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year ► _____

7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ► \$ _____

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets
Complete if the organization answered 'Yes' to Form 990, Part IV, line 8.

1 a If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items.

b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenues included in Form 990, Part VIII, line 1 ► \$ _____

(ii) Assets included in Form 990, Part X ► \$ _____

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items

a Revenues included in Form 990, Part VIII, line 1 ► \$ _____

b Assets included in Form 990, Part X ► \$ _____

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization's acquisition accession and other records, check any of the following that are a significant use of its collection items (check all that apply):

a ☐ Public exhibition

d ☐ Loan or exchange programs

b ☐ Scholarly research

e ☐ Other _____

c ☐ Preservation for future generations

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?

☐ Yes

☐ No

Part IV Escrow and Custodial Arrangements Complete if organization answered 'Yes' to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian, or other intermediary for contributions or other assets not included on Form 990, Part X?

☐ Yes

☐ No

b If 'Yes,' explain the arrangement in Part XIV and complete the following table

	Amount
1c Beginning balance	
1d Additions during the year	
1e Distributions during the year	
1f Ending balance	

2a Did the organization include an amount on Form 990, Part X, line 21?

☐ Yes

☐ No

b If 'Yes,' explain the arrangement in Part XIV.

Part V Endowment Funds Complete if organization answered 'Yes' to Form 990, Part IV, line 10.

1a Beginning of year balance

b Contributions

c Net Investment earnings, gains, and losses

d Grants or scholarships

e Other expenditures for facilities and programs

f Administrative expenses

g End of year balance

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a					
1b					
1c					
1d					
1e					
1f					
1g					

2 Provide the estimated percentage of the year end balance held as

a Board designated or quasi-endowment _____ %

b Permanent endowment _____ %

c Term endowment _____ %

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by

(i) unrelated organizations

(ii) related organizations

b If 'Yes' to 3a(ii), are the related organizations listed as required on Schedule R?

	Yes	No
3a(i)		
3a(ii)		
3b		

4 Describe in Part XIV the intended uses of the organization's endowment funds.

Part VI Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated Depreciation	(d) Book Value
1a Land				
b Buildings				
c Leasehold improvements				
d Equipment		37,285.	27,256.	10,029.
e Other		18,590.	15,398.	3,192.
Total. Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c).)				13,221.

BAA

Schedule D (Form 990) 2009

Part VII Investments—Other Securities See Form 990, Part X, line 12. N/A

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
Financial derivatives		
Closely-held equity interests		
Other		
Total. (Column (b) must equal Form 990 Part X, col (B) line 12.) ▶		

Part VIII Investments—Program Related (See Form 990, Part X, line 13) N/A

(a) Description of investment type	(b) Book value	(c) Method of valuation Cost or end-of-year market value
Total. (Column (b) must equal Form 990, Part X, Col (B) line 13.) ▶		

Part IX Other Assets (See Form 990, Part X, line 15) N/A

(a) Description	(b) Book value
Total. (Column (b) must equal Form 990, Part X, col (B), line 15) ▶	

Part X Other Liabilities (See Form 990, Part X, line 25)

(a) Description of Liability	(b) Amount
Federal Income Taxes	
ANNUITY OBLIGATIONS	1,393,061.
DONOR DESIGNATED FUNDS	8,321,964.
DUE TO OTHER ORGANIZATIONS	2,972,740.
Total. (Column (b) must equal Form 990, Part X, col (B) line 25) ▶	12,687,765.

2. FIN 48 Footnote. In Part XIV, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48

Part XI Reconciliation of Change in Net Assets from Form 990 to Financial Statements

1	Total revenue (Form 990, Part VIII, column (A), line 12)	3,219,632.
2	Total expenses (Form 990, Part IX, column (A), line 25)	3,710,300.
3	Excess or (deficit) for the year Subtract line 2 from line 1	-490,668.
4	Net unrealized gains (losses) on investments	
5	Donated services and use of facilities	
6	Investment expenses	
7	Prior period adjustments	
8	Other (Describe in Part XIV)	
9	Total adjustments (net) Add lines 4 through 8	
10	Excess or (deficit) for the year per audited financial statements Combine lines 3 and 9	-490,668.

Part XII Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements	1	3,219,632.
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12:		
a	Net unrealized gains on investments	2a	
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1	3	3,219,632.
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1:		
a	Investments expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	
5	Total revenue Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)	5	3,219,632.

Part XIII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements	1	3,710,300.
2	Amounts included on line 1 but not on Form 990, Part IX, line 25:		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1	3	3,710,300.
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investments expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	
5	Total expenses Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)	5	3,710,300.

Part XIV Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4; Part X, line 2, Part XI, line 8, Part XII, lines 2d and 4b, and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

Part XIV	Supplemental Information <i>(continued)</i>
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This image shows a full page of white paper with horizontal dashed lines, typical of primary-ruled notebook paper. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings present.

Complete if the organization answered 'Yes,' to Form 990, Part IV, lines 21 or 22.

► Attach to Form 990.

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Name of the organization

Employer identification number

95-3645825

COMMUNITY FOUNDATION OF THE JEWISH

Part I	General Information on Grants and Assistance
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- 1** Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

- 2** Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States. **SEE PART IV**

Part II	Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered 'Yes' to Form
---------	--

990. Part IV, line 21 for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Use

Part IV and Schedule I-1 (Form 990) if additional space is needed

[illegible]

- 2** Enter total number of section 501(c)(3) and government organizations

- 3 Enter total number of other organizations**

BAA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

TEEA3901L 02/10/10

Schedule I (Form 990) 2009

SCHEDULE O
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990

Complete to provide information for responses to specific questions on
Form 990 or to provide any additional information.
▶ Attach to Form 990.

OMB No 1545-0047

2009

**Open to Public
Inspection**

Name of the organization **COMMUNITY FOUNDATION OF THE JEWISH
FEDERATION OF ORANGE COUNTY**

Employer identification number
95-3645825

FORM 990, PART VI, LINE 2 - BUSINESS OR FAMILY RELATIONSHIP OF OFFICERS, DIRECT

JON FEDER AND PEGGY FEDER ARE MARRIED. STEVEN FAINBARG IS THE SON OF ALLAN FAINBARG.

FORM 990, PART VI, LINE 11 - FORM 990 REVIEW PROCESS

REVIEW BY BOARD TREASURER AND DIRECTOR OF ADMINISTRATION BEFORE FILING.

FORM 990, PART VI, LINE 12C - EXPLANATION OF MONITORING AND ENFORCEMENT OF CONFLICTS

UPDATED AND REVIEWED ANNUALLY BY BOARD OF DIRECTORS

FORM 990, PART VI, LINE 15A - COMPENSATION REVIEW & APPROVAL PROCESS FOR CEO, EXEC. DIR., OR TOP MGT

COMPENSATION RECOMMENDED TO BOARD OF DIRECTORS BY PERSONNEL COMMITTEE. FINAL

APPROVAL BY BOARD OF DIRECTORS.

FORM 990, PART VI, LINE 15B - COMPENSATION REVIEW & APPROVAL PROCESS FOR OFFICERS & KEY EMPLOYEES

COMPENSATION REVIEWED AND DETERMINED BY PERSONNEL COMMITTEE, FOLLOWED BY BOARD OF

DIRECTORS APPROVAL.

FORM 990, PART VI, LINE 19 - OTHER ORGANIZATION DOCUMENTS PUBLICLY AVAILABLE

ALL DOCUMENTS, POLICIES, AND FINANCIAL STATEMENTS PRESENTED TO BOARD OF DIRECTORS.

ADDITIONAL COPIES AVAILABLE BY ANY DIRECTOR OR INTERESTED PARTY WHO REQUESTS ONE.

Name of the organization COMMUNITY FOUNDATION OF THE JEWISH
FEDERATION OF ORANGE COUNTY

Employer identification number
95-3645825

2009

FEDERAL WORKSHEETS
COMMUNITY FOUNDATION OF THE JEWISH
FEDERATION OF ORANGE COUNTY

PAGE 1

95-3645825

FORM 990, PART IX, LINE 24
OTHER EXPENSES

	(A) TOTAL	(B) PROGRAM SERVICES	(C) MANAGEMENT & GENERAL	(D) FUNDRAISING
MEALS/FUNCTIONS	382.		191.	191.
PAYROLL FEES	1,797.		1,203.	594.
STORAGE	840.		840.	
SUPPLIES	3,244.		1,622.	1,622.
TELEPHONE	612.		306.	306.
TOTAL	\$ 6,875.	\$ 0.	\$ 4,162.	\$ 2,713.

COMMUNITY FOUNDATION of the Jewish Federation of Orange County
2009 Allocations by Recipients

Recipient	Amount
1939 CLUB	\$500 00
ACLU FOUNDATION OF SOUTHERN CALIFORNIA	\$200 00
AIDS PROJECT LOS ANGELES	\$100 00
AIDS SERVICES FOUNDATION	\$100 00
AIR FORCE ASSOCIATION	\$150 00
AISH HATORAH	\$10,699 00
ALBUQUERQUE BIOLOGICAL PARK	\$750 00
ALLIANCE FOR THE ARTS	\$250 00
ALTERNATIVE LIVING FOR THE AGING	\$500 00
ALZHEIMER'S ASSOCIATION	\$1,610 00
ALZHEIMERS ASSOCIATION OF ORANGE COUNTY	\$200 00
ALZHEIMER'S DISEASE & RDA	\$650 00
ALZHEIMER'S FAMILY SERVICE CENTER	\$250 00
AMANDA FOUNDATION	\$250 00
AMAZE	\$500 00
AMERICAN ASSOC - PREVENTION OF CRUELTY OF ANIMALS	\$100 00
AMERICAN ASSOCIATES BEN GURION UNIVERSITY	\$235 00
AMERICAN CANCER SOCIETY	\$3,035 00
AMERICAN COMMITTEE FOR SHAARE ZEDEK JERUSALEM	\$250 00
AMERICAN DIABETES ASSOCIATION	\$2,000 00
AMERICAN FARMLAND TRUST	\$100 00
AMERICAN FRIENDS HEBREW UNIVERSITY	\$350 00
AMERICAN FRIENDS OF BAR-ILAN UNIVERSITY	\$180 00
AMERICAN FRIENDS OF GEORGIAN GROUP LONDON	\$2,500 00
AMERICAN FRIENDS OF ISRAEL MUSEUM	\$350 00
AMERICAN FRIENDS OF MAGEN DAVID ADOM	\$40,867 00
AMERICAN FRIENDS OF PONEVITZ YESHIVA	\$1,800 00
AMERICAN FRIENDS OF TEL AVIV UNIVERSITY	\$100 00
AMERICAN FRIENDS OF THE IPO	\$360 00
AMERICAN FRIENDS OF YAD EZRA V'SHULAMIT	\$360 00
AMERICAN HEART ASSOCIATION	\$1,000 00
AMERICAN JEWISH COMMITTEE	\$32,135 00
AMERICAN JEWISH COMMITTEE - NEW YORK	\$3,000 00
AMERICAN JEWISH CONGRESS	\$100 00
AMERICAN JEWISH HISTORICAL SOCIETY	\$200 00
AMERICAN JEWISH WORLD SERVICE	\$2,550 00
AMERICAN PADRES FOUNDATION	\$5,000 00
AMERICAN RED CROSS	\$100 00
AMERICAN RED CROSS GREATER LOS ANGELES	\$3,300 00
AMERICAN RED CROSS ORANGE COUNTY CHAPTER	\$3,035 00
AMERICAN SOCIETY FOR PREVENTION OF CRUELTY TO	\$100 00
AMERICAN SOCIETY FOR YAD VASHEM	\$530 00
AMERICAN STROKE ASSOCIATION	\$100 00
AMERICAN TECHNION SOCIETY	\$5,953 00
AMERICAN TINNITUS ASSOCIATION	\$100 00
AMERICAN ISRAELI COOPERATIVE ENTERPRISE	\$100 00
AMERICANS UNITED FOR SEPARATION OF CHURCH & STATE	\$200 00
AMIT	\$100 00
AMNESTY INTERNATIONAL USA	\$700 00
ANGELS BEARING GIFTS	\$200 00
ANTI-DEFAMATION LEAGUE	\$29,165 00
ARIEL RESCUE	\$250 00
ARMDI GOLDEN RULE CHAPTER OF LAGUNA HILLS	\$135 00
ARTHRITIS FOUNDATION SOUTHERN CALIFORNIA CHAPTER	\$200 00
ARTISTS FOR HUMANITY	\$100 00
ARTS ORANGE COUNTY	\$2,250 00
ASSOCIATION JEWISH LIBRARIES SOUTHERN CALIFORNIA	\$500 00
ASSOCIATION OF CALIFORNIA SYMPHONY ORCHESTRAS	\$170 00
AUTISM SPEAKS	\$200 00
AUXILIARY SERVICE CORP / CSUF	\$200 00
BALBOA PERFORMING ARTS THEATER FOUNDATION	\$600 00
BARBER SHOP HARMONY SOCIETY	\$100 00
BAT SHEVA LABOWE-STOLL FUND FOR THE SUPPORT OF	\$2,000 00
BECKSTRAND CANCER FOUNDATION	\$500 00
BEST FRIENDS ANIMAL SANCTUARY	\$300 00
BET TZEDEK	\$600 00
BETH AARON V' ISRAEL	\$1,000 00
BETH EL TEMPLE CENTER	\$250 00

Recipient	Amount
BETH JACOB CONGREGATION	\$100 00
BETH JACOB CONGREGATION OF IRVINE	\$14,496 00
BETH MEDRASH GOVOHA	\$180 00
BETH SHALOM OF WHITTIER	\$150 00
BETH TORAH SYNAGOGUE	\$140,245 48
BIRTHRIGHT ISRAEL FOUNDATION	\$300 00
B'NAI B'RITH YOUTH ORGANIZATION	\$320 00
B'NAI EMUNAH	\$2,500 00
BOALT HALL SCHOOL OF LAW	\$5,000 00
BOB HOPE DESERT CLASSIC CHARITIES	\$8,000 00
BOWERS MUSEUM OF CULTURAL ART	\$275 00
BOXER RESCUE LOS ANGELES	\$150 00
BOY SCOUTS OF AMERICA	\$1,425 00
BOYS & GIRLS CLUB OF TUSTIN	\$500 00
BOYS & GIRLS CLUB OF VENICE	\$500 00
BOYS TOWN JERUSALEM FOUNDATION OF AMERICA	\$100 00
BRADY CENTER TO PREVENT GUN VIOLENCE	\$150 00
BRAILLE INSTITUTE OF AMERICA	\$1,100 00
BRAIN INJURY CENTER	\$1,000 00
BREAST CANCER FUND	\$400 00
BRENTWOOD SCHOOL	\$4,600 00
BRIDGE LEARNING CENTER	\$1,000 00
BRONX HIGH SCHOOL OF SCIENCE	\$100 00
BROWN ALUMNI MAGAZINE	\$100 00
BROWN UNIVERSITY	\$1,000 00
BUREAU OF JEWISH EDUCATION	\$113,079 97
BUREAU OF JEWISH EDUCATION LOS ANGELES	\$400 00
CAL STATE FULLERTON PHILANTHROPIC FOUNDATION	\$3,350 00
CAL STATE UNIVERSITY FULLERTON	\$200 00
CAL STATE UNIVERSITY LONG BEACH	\$1,300 00
CALIFORNIA DOLLARS FOR SCHOLARS	\$400 00
CALIFORNIA STATE PARKS FOUNDATION	\$100 00
CAMP BEECHCLIFF	\$100 00
CANYON ACRES CHILDREN & FAMILY SERVICES	\$1,100 00
CARE GIFT CENTER	\$100 00
CARING BRIDGE	\$380 00
CARYN ALTMAN FOUNDATION	\$120 09
CASA OF ORANGE COUNTY	\$1,000 00
CDCH FOUNDATION FOR SPECIAL CHILDREN	\$125 00
CENTENNIAL FARMS FOUNDATION	\$600 00
CENTER FOR REPRODUCTIVE RIGHTS	\$100 00
CENTER THEATRE GROUP	\$10,000 00
CHABAD	\$1,125 00
CHABAD - INLAND EMPIRE	\$1,000 00
CHABAD AT UNIVERSITY OF COLORADO	\$613 00
CHABAD JEWISH CENTER OF NEWPORT BEACH	\$5,550 00
CHABAD JEWISH STUDENT CENTER @ USC	\$475 00
CHABAD LUBAVITCH	\$1,000 00
CHABAD OF IRVINE	\$20,246 00
CHABAD OF LAGUNA BEACH	\$1,000 00
CHABAD OF NEW MEXICO	\$500 00
CHABAD OF NEWPORT BEACH	\$33,536 00
CHABAD OF NORTHERN NEVADA	\$1,000 00
CHABAD OF RENO	\$1,000 00
CHABAD OF SAN CLEMENTE	\$7,500 00
CHABAD OF WEST VALLEY	\$500 00
CHAI HOUSE	\$3,600 00
CHAI LIFELINE	\$500 00
CHAMPIONS OF DISCOVERY	\$360 00
CHAPMAN UNIVERSITY	\$109,325
CHARITY NAVIGATOR	\$100 00
CHARTER 100	\$250 00
CHILDREN'S DEFENSE FUND	\$100 00
CHILDREN'S DENTAL CENTER	\$250 00
CHILDREN'S HOME SOCIETY	\$2,500 00
CHILDREN'S HOSPITAL FOUNDATION	\$3,700 00
CHILDREN'S HOSPITAL OF ORANGE COUNTY	\$28,000 00
CHILDREN'S TUMOR FOUNDATION	\$200 00

COMMUNITY FOUNDATION of the Jewish Federation of Orange County
2009 Allocations by Recipients

Recipient	Amount
CHRON'S COLITIS FOUNDATION OF AMERICA	\$200 00
CITIZENS AGAINST GOVERNMENT WASTE	\$100 00
CITY OF HOPE	\$18,280 00
CLAIRE TREVOR SCHOOL OF THE ARTS	\$250 00
CLAREMONT INSTITUTE	\$1,000 00
CLARENCE GERBER MEMORIAL PASSOVER PROGRAM	\$200 00
COLUMBUS TUSTIN P T O	\$1,000 00
COMBINED JEWISH PHILANTHROPIES	\$100 00
COMMITTEE FOR ACCURACY IN MIDDLE EAST REPORTING IN	\$800 00
COMMITTEE FOR CONSTRUCTIVE TOMORROW	\$100 00
COMMUNICATIONS DISORDERS RESEARCH FOUNDATION	\$12,000 00
COMMUNITY SENIOR SERVICE	\$100 00
CONCERN FOUNDATION	\$1,200 00
CONCILLIO DE YOLO COUNTY	\$2,000 00
CONCILLIO OF YOLO COUNTY	\$2,000 00
CONEJO JEWISH DAY SCHOOL	\$300 00
CONGREGATION BETH MEIER	\$600 00
CONGREGATION BETH MEIR HA COHEN	\$25,000 00
CONGREGATION B'NAI ISRAEL	\$86,832 00
CONGREGATION B'NAI TORAH	\$2,900 00
CONGREGATION B'NAI TZEDEK	\$100 00
CONGREGATION EILAT	\$1,104 50
CONGREGATION EMANUEL	\$325 00
CONGREGATION ETZ CHAIM	\$5,531 00
CONGREGATION KOL AMI	\$1,250 00
CONGREGATION OHR HA CHAIM	\$180 00
CONGREGATION OR HADASH	\$1,200 00
CONGREGATION SHIR HA-MA' ALOT	\$33,220 00
CONSTITUTIONAL RIGHTS FOUNDATION	\$100 00
CONSUMER REPORTS FOUNDATION	\$900 00
CORNELL UNIVERSITY	\$100 00
COUNTY LIBRARY FOUNDATION	\$100 00
COURT APPOINTED SPECIAL ADVOCATES OF ORANGE COUNTY	\$625 00
CRI HELP INC	\$400 00
CRITTENTON SERVICES FOR CHILDREN & FAMILIES	\$250 00
CRUISIN FOR A CURE	\$1,000 00
CSPINUTRITION ACTION HEALTHLETTER	\$100 00
CUDDLY CANINES RESCUE	\$250 00
CYSTIC FIBROSIS FOUNDATION	\$400 00
DANA FARBER CANCER CENTER	\$2,180 00
DAVID HOROWITZ FREEDOM CENTER	\$100 00
DECORATIVE ARTS SOCIETY	\$1,500 00
DEFENDERS OF WILDLIFE	\$100 00
DIRECT RELIEF INTERNATIONAL	\$200 00
DISABILITY RIGHTS ADVOCATES FOR TECHNOLOGY	\$1,000 00
DISCOVERY SCIENCE CENTER	\$500 00
DOCTORS MAYO SOCIETY	\$100 00
DOCTORS WITHOUT BORDERS	\$1,050 00
DOHENY EYE INSTITUTE	\$2,600 00
DOLPHIN FORCE - BASEBALL	\$340 00
DOOR OF FAITH ORPHANAGE	\$800 00
DRUG USE IS LIFE ABUSE	\$6,000 00
EARTHJUSTICE	\$200 00
EAST LOS ANGELES COLLEGE FOUNDATION	\$3,000 00
ELDERHOSTEL ANNUAL FUND	\$100 00
ENVIRONMENTAL DEFENSE	\$100 00
EPILEPSY FOUNDATION OF GREATER LOS ANGELES	\$180 00
EPSTEIN SCHOOL	\$2,000 00
EZRA CENTER	\$5,500 00
EZRAS TORAH	\$180 00
EZRAT ISRAEL	\$1,000 00
FACING HISTORY AND OURSELVES	\$350 00
FAIRVIEW FAMILIES & FRIENDS	\$100 00
FAMILIES FORWARD	\$8,500 00
FAMILY SERVICE OF MORRIS COUNTY	\$750 00
FEEDING AMERICA	\$200 00
FINCA INTERNATIONAL, INC	\$300 00
FIND FOOD BANK	\$100 00

Recipient	Amount
FOUNDATION FIGHTING BLINDNESS	\$100 00
FRIENDS & HELPERS	\$200 00
FRIENDS OF ARAVA INSTITUTE	\$100 00
FRIENDS OF BEVERLY HILLS PUBLIC LIBRARY	\$100 00
FRIENDS OF HATZOLAH ISRAEL	\$360 00
FRIENDS OF IR DAVID	\$180 00
FRIENDS OF ISRAEL DEFENSE FORCES	\$100 00
FRIENDS OF ISRAEL DISABLED VETERANS, INC	\$100 00
FRIENDS OF MADISON SHADE TREES	\$100 00
FRIENDS OF MCGILL UNIVERSITY	\$500 00
FRIENDS OF OASIS	\$200 00
FRIENDS OF ORANGE COAST INTERFAITH SHELTER	\$55,930 00
FRIENDS OF ORANGE COUNTY HOMELESS PETS	\$250 00
FRIENDS OF SOUTH COAST REPERTORY	\$150 00
FRIENDS OF THE EARTH	\$100 00
FRIENDS OF YAD EZRA VESHULAMIT	\$2,000 00
FRIENDS OF YAD SARAH	\$111 00
FRIENDSHIP CIRCLE ORANGE COUNTY	\$7,550 00
FRIENDSHIP SHELTER OF LAGUNA BEACH	\$350 00
FULLERTON FRIENDS OF MUSIC	\$150 00
FURNISHING HOPE	\$100 00
GARY CENTER	\$150 00
GENERAL ISRAEL ORPHANS HOME FOR GIRLS	\$100 00
GETTYSBURG FOUNDATION	\$125 00
GIRL SCOUT TROOP #106	\$1,000 00
GIRLS INC	\$500 00
GIRLS INCORPORATED OF ORANGE COUNTY	\$34,750 00
GLAUCOMA FOUNDATION	\$400 00
GRANDPARENT AUTISM NETWORK	\$830 00
GREAT SWAMP WATERSHED ASSOCIATION	\$100 00
GUARDIANS	\$600 00
GUIDE DOGS FOUNDATION FOR THE BLIND	\$200 00
GUIDE DOGS OF AMERICA	\$150 00
GUTTMACHER INSTITUTE	\$100 00
HABITAT FOR HUMANITY	\$200 00
HABONIM DROR NORTH AMERICA	\$108 00
HACHNASAS KALLAH OF GREATER LOS ANGELES	\$2,500 00
HADASSAH	\$1,200 00
HADASSAH - NEW YORK	\$530 00
HADASSAH - ORANGE COUNTY	\$87 00
HADASSAH HOUSE	\$100 00
HADASSAH LAGUNA HILLS	\$200 00
HADASSAH SOUTHERN CALIFORNIA	\$200 00
HADASSAH, WOMEN'S ZIONIST ORGANIZATION OF AMERICA	\$52,942 00
HANDS TOGETHER, A CENTER FOR CHILDREN	\$1,000 00
HAR ZION TEMPLE	\$2,290 00
HARBOR DAY SCHOOL	\$150 00
HAVE A CHANCE FOUNDATION	\$100 00
HEALING ODYSSEY	\$100 00
HEART ASSOCIATION	\$100 00
HEARTS FOR HOUNDS	\$250 00
HEBREW ACADEMY	\$27,360 00
HEBREW IMMIGRANT AID SOCIETY	\$250 00
HEBREW UNION COLLEGE	\$1,000 00
HELPING HANDS	\$228 00
HELPING HANDS OF CEDAR SINAI HOSPITAL	\$100 00
HERITAGE FOUNDATION	\$100 00
HERITAGE MUSEUM	\$125 00
HERITAGE POINTE	\$141,664 00
HEROES FOR CHILDREN	\$250 00
HIDDUR CENTER FOR AGING & JUDAISM	\$1,500 00
HILLEL	\$1,108 00
HILLEL FOUNDATION FOR JEWISH CAMPUS LIFE	\$200 00
HILLEL FOUNDATION OF ORANGE COUNTY	\$71,879 00
HOAG HOSPITAL	\$13,250 00
HOAG HOSPITAL FOUNDATION	\$61,300
HOLOCAUST MUSEUM	\$460 00
HOPE FUND	\$300 00

COMMUNITY FOUNDATION of the Jewish Federation of Orange County
2009 Allocations by Recipients

Recipient	Amount
HOPITAL ALBERT SCHWEITZER HAITI	\$100 00
HUMAN OPTIONS	\$1,100 00
ILLINOIS INSTITUTE OF TECHNOLOGY	\$1,500 00
IN DEFENSE OF ANIMALS	\$200 00
INTERCOLLEGIATE STUDIES INSTITUTE, INC	\$100 00
INTERFAITH INVENTIONS	\$140 00
INTERNATIONAL CHILDREN'S FUND	\$200 00
INTERNATIONAL PLANNED PARENTHOOD FEDERATION	\$100 00
INTERNATIONAL RESCUE COMMITTEE	\$400 00
INTERNATIONAL WALDENSTROM MACROGLOBULINEMIA	\$100 00
INTERNATIONAL WALDENSTROM MACROGLOBULINEMIA	\$500 00
INVEST IN CHILDRENS FUND	\$2,000 00
INVESTIGATIVE PROJECT ON TERRORISM FOUNDATION	\$500 00
IRVINE BARCLAY THEATRE	\$1,300 00
ISRAEL CANCER RESEARCH FUND	\$35 00
ISRAEL GUIDE DOG CENTER FOR THE BLIND	\$300 00
ISRAEL UP CLOSE	\$5,000 00
JACK & JILL LATE STAGE CANCER FOUNDATION	\$500 00
JBI INTERNATIONAL	\$300 00
JCC ASSOCIATION	\$500 00
JEREMIAH SOCIETY	\$100 00
JEWISH BRAILLE INSTITUTE OF AMERICA	\$100 00
JEWISH CHAUTAUQUA SOCIETY	\$108 00
JEWISH COMMUNITY CENTER OF GREATER BOSTON	\$1,875 00
JEWISH COMMUNITY CENTER OF LONG BEACH	\$500 00
JEWISH COMMUNITY CENTER OF ORANGE COUNTY	\$257,300 00
JEWISH COMMUNITY FORUM	\$140 00
JEWISH FAMILY & CHILDRENS SERVICES	\$609 00
JEWISH FAMILY SERVICE LOS ANGELES	\$1,250 00
JEWISH FAMILY SERVICE OF ORANGE COUNTY	\$233,344 72
JEWISH FAMILY SERVICE OF THE DESERT	\$5,100 00
JEWISH FEDERATION LAS VEGAS	\$5,000 00
JEWISH FEDERATION OF GREATER ATLANTA	\$180 00
JEWISH FEDERATION OF GREATER PHILADELPHIA	\$500 00
JEWISH FEDERATION OF LOS ANGELES	\$1,250 00
JEWISH FEDERATION OF ORANGE COUNTY	\$776,603 19
JEWISH FEDERATION OF PALM SPRINGS	\$1,000 00
JEWISH FEDERATION OF SILICON VALLEY	\$5,632 00
JEWISH FEDERATION OF TULSA	\$5,000 00
JEWISH FOUNDATION FOR THE RIGHTEOUS	\$300 00
JEWISH FREE LOAN ASSOCIATION	\$1,400 00
JEWISH FUND FOR JUSTICE	\$750 00
JEWISH INSTITUTE FOR NATIONAL SECURITY AFFAIRS (JINSA)	\$100 00
JEWISH NATIONAL FUND	\$3,648 00
JEWISH PARTISANS EDUCATIONAL FOUNDATION	\$180 00
JEWISH RECONSTRUCTIONIST FEDERATION	\$4,400 00
JEWISH STUDIES PROGRAM	\$500 00
JEWISH WAR VETERANS	\$200 00
JEWISH WOMEN INTERNATIONAL	\$100 00
JEWISH WORLD WATCH	\$3,530 00
JEWISHGEN INC	\$100 00
JMF/LOS ANGELES ZIMRIYAN CHORALE	\$100 00
JOHN DOUGLAS FRENCH ALZHEIMER'S FOUNDATION	\$1,000 00
JOHN WAYNE CANCER INSTITUTE	\$1,000 00
JUDAISM BY CHOICE INC	\$1,000 00
JUDICIAL WATCH	\$350 00
JUNIOR BLIND OF AMERICA	\$500 00
JUVENILE DIABETES RESEARCH FOUNDATION	\$2,350 00
KCET T V	\$1,695 00
KCRW	\$660 00
KEHILLAT ISRAEL CONGREGATION	\$2,400 00
KEHILLAT MEVARSHEL DERESH	\$100 00
KELLNER FAMILY PEDIATRIC LIVER FOUNDATION	\$100 00
KEREN HASHVIVIS	\$680 00
KEREN OR JERUSALEM CENTER FOR MULTIPLE HANDICAPPED	\$100 00
KEREN YEHOSHUA VYISROEL, INC	\$1,500 00
KIDS V CANCER	\$100 00
KOCE-TV	\$350 00

Recipient	Amount
KOL YISROEL AREIVIM (KYA)	\$1,000 00
KOLLEL ZICHRON SCHNEUR	\$180 00
KOMEN ORANGE COUNTY RACE FOR THE CURE	\$200 00
KPCC FM	\$620 00
KPCC 89.3 SOUTHERN CALIFORNIA PUBLIC RADIO	\$1,150 00
KUSC 91.5	\$600 00
L A TIMES SUMMER CAMP FUND	\$350 00
LAGUNA ART MUSEUM	\$100 00
LAGUNA BEACH ANIMAL SHELTER	\$100 00
LAGUNA BEACH HIGH SCHOOL SCHOLARSHIP FOUNDATION	\$180 00
LAGUNA PLAYHOUSE	\$3,100 00
LAURA'S HOUSE	\$500 00
LAW ENFORCEMENT LEGAL DEFENSE FUND	\$100 00
LEADERSHIP INSTITUTE	\$200 00
LEAGUE OF AMERICAN ORCHESTRAS	\$1,250 00
LEGAL MOMENTUM	\$100 00
LEHIGH UNIVERSITY	\$250 00
LEO BAECK INSTITUTE	\$100 00
LEUKEMIA & LYMPHOMA SOCIETY	\$200 00
LIBRARY FOUNDATION OF LOS ANGELES	\$100 00
LINUS PAULING INSTITUTE	\$100 00
LIVING SUCCESS CENTER	\$600 00
LIVINGSTON MEMORIAL VISITING NURSE ASSOCIATION	\$200 00
LONG ISLAND UNIVERSITY	\$1,000 00
LOS ANGELES CONSERVANCY	\$100 00
LOS ANGELES COUNTY MUSEUM OF ART	\$200 00
LOS ANGELES HIGH SCHOOL	\$29,000 00
LOS ANGELES JEWISH HOME FOR AGING	\$400 00
LOS ANGELES PHILHARMONIC ASSOC	\$500 00
LOS ANGELES TIMES FUND	\$200 00
LUND FAMILY CENTER	\$100 00
MACCABI USA / SPORTS FOR ISRAEL	\$400 00
MADISON EAGLE CHRISTMAS FUND	\$750 00
MADISON HIGH SCHOOL EDUCATION FOUNDATION	\$200 00
MADISON VOLUNTEER AMBULANCE CORPS	\$100 00
MADISON VOLUNTEER FIRE DEPARTMENT	\$100 00
MAINSTAY LIFE SERVICES	\$250 00
MAKE A WISH FOUNDATION	\$1,600 00
MAKE A WISH FOUNDATION OF ORANGE COUNTY	\$250 00
MARCH OF DIMES	\$200 00
MARINE MAMMAL CENTER	\$200 00
MARINE TOYS FOR TOTS FOUNDATION	\$200 00
MARKAZ HATORAH KOLLEL	\$1,000 00
MARNI FUND STOP CANCER	\$300 00
MASORTI FOUNDATION FOR CONSERVATIVE JUDAISM IN	\$100 00
MASSACHUSETTS INSTITUTE OF TECHNOLOGY	\$500 00
MAYIM RABIN CONGREGATION	\$100 00
MAZON - A JEWISH RESPONSE TO HUNGER	\$7,980 00
MCNEESE ATHLETIC FOUNDATION	\$1,800 00
MEIR PANIM SOUP KITCHENS IN ISRAEL	\$200 00
MELANOMA RESEARCH FOUNDATION	\$1,000 00
MEMORIAL SLOAN-KETTERING HOSPITAL	\$335 00
MEMPHIS JEWISH COMMUNITY CENTER	\$180 00
MENTOR NET	\$1,000 00
MERCY HOUSE	\$100 00
MERKAZ HATORAH KOLLEL	\$500 00
MESIVTA BIRKAS YITZCHOK	\$1,500 00
MIDDLE EAST FORUM	\$500 00
MIDDLE EAST MEDIA RESEARCH INSTITUTE	\$1,500 00
MILIKEN COMMUNITY HIGH SCHOOL ANNUAL GIVING	\$5,000 00
MILWAUKEE JEWISH FEDERATION	\$1,600 00
MIND RESEARCH INSTITUTE	\$6,000 00
MORASHA JEWISH DAY SCHOOL	\$8,891 00
MOSDOS AMRON CHASIDA	\$500 00
MOTHERS AGAINST DRUNKEN DRIVERS	\$150 00
MOUNTAIN STATES LEGAL FOUNDATION	\$100 00
MULTIPLE SCLEROSIS FOUNDATION	\$900 00
MUSCULAR DYSTROPHY	\$250 00

COMMUNITY FOUNDATION of the Jewish Federation of Orange County
2009 Allocations by Recipients

Recipient	Amount
MUSEUM OF FINE ARTS	\$100 00
MUSEUM OF LATIN AMERICAN ART	\$250 00
MUSEUM OF TOLERANCE	\$485 00
MYELOPROLIFERATIVE DISORDERS FOUNDATION	\$2,121 25
MYER C & IDA MILLER HOSPICE	\$25,000 00
MYSTONIC DYSTROPHY FOUNDATION	\$100 00
NA'AMAT USA	\$27,860 00
NATIONAL ALLIANCE FOR MENTALLY ILL	\$100 00
NATIONAL BRAIN TUMOR SOCIETY	\$100 00
NATIONAL CHRISTIAN LEADERSHIP CONFERENCE FOR ISRAEL	\$200 00
NATIONAL COMMITTEE FOR FURTHERANCE OF JEWISH	\$1,000 00
NATIONAL COUNCIL OF JEWISH WOMEN	\$100 00
NATIONAL JEWISH HEALTH	\$400 00
NATIONAL JEWISH MEDICAL & RESEARCH CENTER	\$600 00
NATIONAL MULTIPLE SCLEROSIS SOCIETY	\$300 00
NATIONAL PARK FOUNDATION	\$300 00
NATIONAL PARKINSON'S FOUNDATION	\$100 00
NATIONAL PARKS CONSERVATION	\$200 00
NATIONAL RIGHT TO WORK LEGAL DEFENSE FOUNDATION	\$750 00
NATIONAL WASP WWII MUSEUM	\$100 00
NATIONAL WILDLIFE FOUNDATION	\$100 00
NATIONAL YIDDISH BOOK CENTER	\$1 450 00
NATURAL RESOURCES DEFENSE COUNCIL	\$350 00
NATURE CONSERVANCY	\$1,300 00
NER YISRO'EL	\$1,000 00
NETHERLANDS SOCIAL SERVICE ORGANIZATION (NESSO)	\$100 00
NEUROFIBROMATOSIS, INC	\$100 00
NEW ISRAEL FUND	\$908 00
NEWPORT BEACH PUBLIC LIBRARY	\$550 00
NEWPORT BEACH PUBLIC LIBRARY FOUNDATION	\$2,550 00
NEWPORT THEATRE ARTS CENTER	\$100 00
NORTH AMERICAN CONFERENCE ON ETHIOPIAN JEWRY	\$700 00
NORTH COUNTY CHABAD	\$1,000 00
NORTH TAHOE HEBREW CONGREGATION	\$1,000 00
NORTHEAST INDIANA CHAPTER ARTHRITIS FOUNDATION	\$300 00
NORTHWESTERN UNIVERSITY	\$100 00
OASIS SENIOR CENTER	\$100 00
OBESITY ACTION COALITION	\$380 00
OCEAN CONSERVANCY	\$100 00
OCEANNA	\$4,000 00
OCEANVIEW HIGH SCHOOL	\$200 00
OD YOSEF CHAI	\$180 00
OKLAHOMA ALLIANCE FOR ANIMALS	\$250 00
OPEN PATHS COUNSELING CENTER	\$7,300 00
ORANGE COAST INTERFAITH SHELTER	\$5,100 00
ORANGE COUNTY COMMUNITY FOUNDATION	\$3,000 00
ORANGE COUNTY COMMUNITY HOUSING CORPORATION-	\$5,000 00
ORANGE COUNTY EDUCATION & RESEARCH INSTITUTE	\$500 00
ORANGE COUNTY HIGH SCHOOL OF THE ARTS	\$1,200 00
ORANGE COUNTY HIGH SCHOOL OF THE ARTS FOUNDATION	\$1,000 00
ORANGE COUNTY JEWISH COMMUNITY SCHOLAR PROGRAM	\$15,510 00
ORANGE COUNTY MUSEUM OF ART	\$9,450 00
ORANGE COUNTY PERFORMING ARTS CENTER	\$35,140 00
ORANGE COUNTY RESCUE MISSION	\$450 00
ORANGE COUNTY SCHOOL OF THE ARTS	\$2,500 00
ORANGEWOOD CHILDREN'S FOUNDATION	\$1,400 00
ORECH L'SHABBOS	\$180 00
OREGON SHAKESPEARE FESTIVAL	\$100 00
ORT AMERICA, INC	\$17,660 00
OSHER LIFELONG LEARNING INSTITUTE	\$100 00
OUR COMMUNITY SCHOOL OCS	\$100 00
PACIFIC CHORALE	\$1,500 00
PACIFIC INSTITUTE FOR WOMEN'S HEALTH	\$9,000 00
PACIFIC SYMPHONY	\$26,100 00
PALM BEACH SYNAGOGUE	\$3,000 00
PALM SPRINGS DESERT MUSEUM	\$500 00
PALMIERI, TYLER, WIENER, WILHELM & WALDRON	\$1,710 00
PANCREATIC CANCER ACTION NETWORK	\$1,000 00

Recipient	Amount
PANIM INSTITUTE FOR JEWISH LEADERSHIP & VALUES	\$500 00
PARALYZED VETERANS OF AMERICA	\$100 00
PARENT ASSOCIATION-BAY LAUREL ELEMENTARY	\$380 00
PARENT'S FUND - POMONA COLLEGE	\$150 00
PARENTS TELEVISION COUNCIL	\$100 00
PARKINSONS DISEASE FOUNDATION	\$250 00
PARTNERS IN HEALTH	\$250 00
PCL FOUNDATION	\$100 00
PEABODY CHARTER SCHOOL FOUNDATION	\$300 00
PEDIATRIC CANCER RESEARCH FOR KIDS	\$2,500 00
PEF ISRAEL ENDOWMENT FUNDS, INC	\$3,000 00
PEGASUS SCHOOL	\$39,550 00
PEOPLE FOR THE ETHICAL TREATMENT OF ANIMALS	\$200 00
PEPPERMINT RIDGE	\$7,335 00
PET PROJECT FOUNDATION	\$250 00
PHILADELPHIA JEWISH ARCHIVES CENTER	\$500 00
PHILADELPHIA MUSEUM OF ART	\$1,000 00
PHILHARMONIC SOCIETY OF ORANGE COUNTY	\$6,600 00
PIECE BY PIECE	\$1,000 00
PILLAR OF KINDNESS, INC	\$100 00
PLANNED PARENTHOOD	\$700 00
PLANNED PARENTHOOD FEDERATION OF AMERICA	\$200 00
POPULATION CONNECTION	\$100 00
PRINCETON UNIVERSITY - ANNUAL GIVING	\$850 00
PROGRESSIVE JEWISH ALLIANCE	\$250 00
PROJECT HOPE	\$100 00
PROVIDENCE SAINT JOSEPH FOUNDATION	\$100 00
RABBI MEIR BAAL HANESS CHARITY - CHESED UTZDAKA	\$360 00
RADY CHILDRENS FOUNDATION	\$180 00
RAOUL WALLENBERG COMMITTEE	\$100 00
RECONSTRUCTIONIST RABBINICAL COLLEGE	\$200 00
RED TAIL PROJECT	\$100 00
REDLANDS FIRST UNITED METHODIST CHURCH	\$1,000 00
RESCUING UNWANTED FURRY FRIENDS	\$250 00
REUT INSTITUTE	\$1,000 00
REVLON RUN / WALK FOR WOMEN	\$150 00
RODGERS CENTER FOR HOLOCAUST EDUCATION	\$1,000 00
ROLLING HILLS ELEMENTARY SCHOOL	\$200 00
ROOSEVELT SCHOOL	\$1,400 00
ROSENBERG FUND FOR CHILDREN	\$100 00
RUTGERS UNIVERSITY FOUNDATION	\$500 00
RYMAN ARTS	\$5,400 00
SADDLEBACK CHURCH	\$150 00
SAGE HILL SCHOOL	\$6,000 00
SAGE HILL SCHOOL LIGHTNING FUND	\$250 00
SALERVI COLLEGIUM	\$150 00
SALVATION ARMY	\$2,000 00
SAMUELI HOLOCAUST LIBRARY	\$3,960 00
SAN CLEMENTE ANIMAL SHELTER	\$100 00
SAN FRANCISCO UNIVERSITY HIGH SCHOOL	\$1,500 00
SANTA ANA-TUSTIN HADASSAH	\$100 00
SANTA BARBARA FOUNDATION	\$200 00
SANTIAGO HILLS ELEMENTARY SCHOOL	\$200 00
SARCOMA ALLIANCE	\$1,300 00
SAVE A CHILD'S HEART	\$1,100 00
SCHODACK CAMPSHIP INITIATIVE	\$250 00
SCPR	\$500 00
SECOND HARVEST FOOD BANK OF ORANGE COUNTY	\$6,100 00
SEMPER FI INJURED SOLDIER FUND	\$200 00
SERVING PEOPLE IN NEED - SPIN	\$100 00
SHAAREI TEFILA	\$150 00
SHARE OUR SELVES	\$2,500 00
SHEA THERAPEUTIC RIDING CENTER	\$1,000 00
SHEBA MEDICAL CENTER	\$30 185 00
SHERWIN MILLER MUSEUM OF JEWISH ART	\$250 00
SIGMA ALPHA MU FOUNDATION	\$430 00
SILVER GAN ISRAEL	\$1,100 00
SIMON WIESENTHAL CENTER	\$30,915 00

COMMUNITY FOUNDATION of the Jewish Federation of Orange County
2009 Allocations by Recipients

Recipient	Amount
SISTERS OF CHARITY - SETON RESIDENCE	\$1,000 00
SKIRBALL CULTURAL CENTER	\$1,250 00
SMILE TRAIN	\$700 00
SOUTH COAST REPERTORY	\$61,100 00
SOUTH COUNTY ORT	\$100 00
SOUTHERN CALIFORNIA PUBLIC RADIO	\$1,200 00
SOUTHERN POVERTY LAW CENTER	\$3,900 00
SOUTHWEST HARBOR BEAUTIFICATION	\$150 00
SPECIAL OLYMPICS	\$100 00
SPONDYLITIS ASSOCIATION OF AMERICA	\$800 00
ST HUBERTS ANIMAL WELFARE CENTER	\$350 00
ST JOSEPH BALLET	\$6,000 00
ST JUDE CHILDREN'S HOSPITAL RESEARCH	\$300 00
ST JUDE MEMORIAL FOUNDATION	\$125 00
ST MARY'S HOSPITAL FOUNDATION OF RENO	\$650 00
STANFORD UNIVERSITY	\$275 00
SURFRIDER FOUNDATION	\$200 00
SUSAN G KOMEN FOR THE CURE	\$850 00
SUSAN KOMEN BREAST CANCER FOUNDATION	\$200 00
SWITZER LEARNING CENTER	\$500 00
TALLER SAN JOSE	\$500 00
TARBUT VTORAH COMMUNITY DAY SCHOOL	\$85,479 00
TEACH FOR AMERICA	\$600 00
TEL AVIV UNIVERSITY AMERICAN COUNCIL	\$30,185 00
TEMPLE ALBERT	\$1,400 00
TEMPLE BAT YAHM	\$45,587 00
TEMPLE BETH AM	\$7,500 00
TEMPLE BETH DAVID	\$1,800 00
TEMPLE BETH EL	\$5,105 00
TEMPLE BETH EL OF SOUTH ORANGE COUNTY	\$11,299 00
TEMPLE BETH EMET	\$4,549 00
TEMPLE BETH SHOLOM	\$31,081 00
TEMPLE BETH TIKVAH	\$7,824 00
TEMPLE B'NAI OR	\$4,291 00
TEMPLE B'NAI SHALOM	\$3,541 00
TEMPLE EMANUEL OF RENO	\$1,760 00
TEMPLE HAR SHALOM	\$1,200 00
TEMPLE ISRAEL	\$250 00
TEMPLE JUDEA	\$9,530 00
TEMPLE KLAL YISRAEL	\$2,500 00
TEMPLE NER TAMID	\$200 00
TEMPLE SHIR TIKVA	\$1,000 00
TEMPLE SINAI	\$100 00
THE ARTHRITIS FOUNDATION OF ORANGE COUNTY	\$1,000 00
THE CENTER ORANGE COUNTY	\$500 00
THE JEWISH LEARNING EXCHANGE	\$180 00
THE PESKY LEARNING FOUNDATION	\$100 00
THINK TOGETHER	\$2,000 00
THIRTEEN / WNET	\$100 00
TOMCHEI SHABBOS OF LOS ANGELES	\$2,000 00
TORA DAY SCHOOL	\$250 00
TORAS EMES	\$500 00
TREE PEOPLE	\$350 00
TRINITY COLLEGE	\$250 00
TROOPS NEED YOU	\$100 00
TRUST FOR PUBLIC LAND	\$300 00
TURNING POINT CENTER FOR FAMILIES	\$100 00
TWECADO TRUST	\$250 00
TZIDKATH YOSEPH NAFTALI	\$680 00
U S HOLOCAUST MEMORIAL MUSEUM	\$1,600 00
UC BERKELEY FOUNDATION	\$2,000 00
UC DAVIS FOUNDATION	\$100 00
UC SAN DIEGO SCHOOL OF MEDICINE	\$200 00
UCI FOUNDATION	\$256,500 00
UCLA ALUMNI ASSOCIATION	\$300 00
UCLA CENTER ON AGING	\$200 00
UCLA FOUNDATION	\$7,200 00
UCLA FOUNDATION COLLEGE OF LETTERS & SCIENCE	\$100 00

Recipient	Amount
UCLA FUND	\$100 00
UCLA JONSSON CANCER CENTER FOUNDATION	\$200 00
UCLA SWC DANCE MARATHON	\$100 00
UCSB ALUMNI ASSOCIATION	\$400 00
UNICEF	\$175 00
UNION COUNCIL FOR SOVIET JEWS	\$30,185 00
UNION FOR REFORM JUDAISM	\$108 00
UNION OF CONCERNED SCIENTISTS	\$100 00
UNION RESCUE MISSION	\$500 00
UNITED JEWISH FUND	\$15,000 00
UNITED SERVICES ORGANIZATIONS (USO)	\$300 00
UNITED SYNAGOGUE	\$100 00
UNITED SYNAGOGUE OF CONSERVATIVE JUDAISM	\$100 00
UNITED WAY OF LOS ANGELES	\$300 00
UNITED WAY OF ORANGE COUNTY	\$1,782 00
UNIVERSITY INTERFAITH FOUNDATION	\$100 00
UNIVERSITY OF CALIFORNIA	\$1,180 00
UNIVERSITY OF CALIFORNIA, IRVINE	\$1,000 00
UNIVERSITY OF DENVER	\$100 00
UNIVERSITY OF MEMPHIS FOUNDATION	\$300 00
UNIVERSITY OF PUGET SOUND	\$100 00
UNIVERSITY OF TEXAS / CALLIER CENTER FOR COMM DIS	\$457 00
UNIVERSITY SYNAGOGUE	\$141,140 00
US FUND FOR UNICEF	\$200 00
USC/NORRIS COMPREHENSIVE CANCER CENTER	\$585 00
USO WORLD HEADQUARTERS	\$350 00
VARIETY BOYS & GIRLS CLUB	\$800 00
VENICE FAMILY CLINIC	\$2,500 00
VILLA ESPERANZA	\$100 00
VISTA DEL MAR ASSOCIATES	\$3,200 00
VISTA VERDE PTA	\$700 00
VP FOUNDATION	\$100 00
WASHINGTON UNIVERSITY	\$125 00
WEIZMANN INSTITUTE OF SCIENCE	\$100 00
WEST LOS ANGELES SYMPHONY	\$150 00
WESTERN STATES JEWISH HISTORY	\$250 00
WESTSIDE JEWISH COMMUNITY CENTER	\$500 00
WILDLIFE CONSERVATION SOCIETY	\$100 00
WILSHIRE BOULEVARD TEMPLE	\$17,750 00
WISE PLACE	\$800 00
WNYC RADIO	\$100 00
WOMEN & CHILDRENS CENTER OF THE SIERRAS	\$3,000 00
WOMEN FOR WOMEN INTERNATIONAL	\$100 00
WOMEN'S CANCER ACTION	\$500 00
WOMEN'S CANCER RESEARCH FOUNDATION	\$1,500 00
WOMEN'S ENVIRONMENTAL INSTITUTE	\$300 00
WOODEN FLOOR	\$2,500 00
WOODLAND HILLS - ROTARY FOUNDATION	\$1,000 00
WOODROW WILSON HIGH SCHOOL	\$52,000 00
WOODWARD ACADEMY	\$100 00
WORLD JEWISH CONGRESS	\$785 00
WORLD JEWISH CONGRESS FOUNDATION	\$350 00
WORLD WAR II VETERANS COMMITTEE	\$100 00
WORLD WILDLIFE FUND	\$100 00
YAD EZRA VSHULAMIT	\$360 00
YESHIVA AND MESIVTA MEOR YITCHOK	\$1,500 00
YESHIVA OF LOS ANGELES	\$860 00
YOUNG AMERICA'S FOUNDATION	\$100 00
ZAKA RESCUE & RECOVERY	\$360 00
ZETA BETA TAU FOUNDATION	\$600 00
Grand Total	\$4 163,888 20

Less allocations of funds held for others

Allocations per return

< 791,225 >

3,372,663

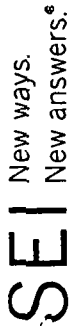
Statement 2

COMM FOUNDATION - 2009 REALIZED CAPITAL GAINS, (LOSS)

MONTH	BAL FUND	AMER JEWISH	HERT PT	FAINBARG A	FEUERSTEIN A FUND	R FEUERSTEIN A FUND	PHIL FUNDS	JFS
JAN	(2,280,778 90)	(6 72)	(123 29)	(28 16)	(27 35)	(3 30)	-	-
FEB	(44,498 65)	(10 16)	(116 03)	(74 93)	(72 82)	(8 56)	-	-
MAR	(2,842 66)	(7 94)	(145 20)	(43 82)	(42 58)	(4 88)	-	-
APR	(3,977 39)	(158 45)	-	(27 82)	(27 04)	(3 08)	(1,936 73)	-
MAY	(1,780 21)	(5 83)	(79 65)	(1,263 55)	(41 89)	(4 80)	(1,141 00)	-
JUNE	(2,282 61)	(0 55)	(85 70)	(15 56)	(15 96)	(1 82)	(2,908 26)	(4,048 31)
JULY	(54,939 99)	(3 76)	(1,148 08)	(6 40)	(6 55)	(0 76)	(6,865 48)	-
AUG	40 77	(118 60)	-	10 32	10 40	1 19	-	-
SEPT	-	(62 52)	(29 83)	13 71	14 00	1 61	809 97	-
OCT	-	(42 95)	(4,745 38)	19.55	19 94	2 28	2,061 65	-
NOV	332 50	(3 04)	-	28.74	29 35	3 37	-	-
DEC	2,753 14	(62 90)	118 54	45 24	46 18	5 28	4,383 25	5 55
TOTAL	<u>(2,387,974 00)</u>	<u>(483 42)</u>	<u>(6,354 62)</u>	<u>(1,342 68)</u>	<u>(114 32)</u>	<u>(13 47)</u>	<u>(5,596 60)</u>	<u>(4,042 76)</u>
PROCEEDS	6,650,158 18	8,602 87	102,966 05	44,144 02	9,840 18	1,134 30	705,365 42	50,000 00
COST BASIS	<u>(9,038,131 18)</u>	<u>(9,086 29)</u>	<u>(109,320 67)</u>	<u>(45,486 70)</u>	<u>(9,954 50)</u>	<u>(1,147 77)</u>	<u>(710,962 02)</u>	<u>(54,042 76)</u>
GAIN, (LOSS)	<u>(2,387,973 00)</u>	<u>(483 42)</u>	<u>(6,354 62)</u>	<u>(1,342 68)</u>	<u>(114 32)</u>	<u>(13 47)</u>	<u>(5,596 60)</u>	<u>(4,042 76)</u>

<u>SHIR</u>	<u>SCHWARTZ PHIL FUND</u>	<u>TOTAL</u>
-	(0 97)	(2,280,968 69)
-	-	(44,781 15)
-	(9 74)	(3,096.82)
(2 43)		(6,132 94)
(157 41)	(3 29)	(4,477 63)
(1 31)	(0 47)	(9,360 55)
(188 12)	(42 34)	(63,201 48)
(0 38)	-	(56 30)
0 67	49 38	796 99
3 08	24 24	(2,657 59)
-	-	390 92
<u>22 43</u>	<u>2 84</u>	<u>7,319 55</u>
<u>(323 47)</u>	<u>19 65</u>	<u>(2,406,225 69)</u>

6,133 28	5,688 98	7,584,033 28
<u>(6,456 75)</u>	<u>(5,669 33)</u>	<u>(9,990,257 97)</u>
<u>(323 47)</u>	<u>19 65</u>	<u>(2,406,224 69)</u>



2009 Tax Information Statement

COMMUNITY FDN OF JEWISH FED OF OC

From:

SEI PRIVATE TRUST COMPANY
ONE FREEDOM VALLEY DRIVE
OAKS, PA 19456

CFJFOC-BALANCED POOL

Contents

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Proceeds from Broker and Barter Exchange Transactions	6
Dividends and Interest Detail	11
Other Tax Information	14

Mail to:

COMMUNITY FDN OF JEWISH FED OF OC
C/O MYRNA SHIELDS
1 FEDERATION WAY - SUITE #210
IRVINE, CA 92603

Questions?

If you have any questions regarding this tax information statement, please call SEI PRIVATE TRUST COMPANY at (888)734-2010



Important Tax Information

Balanced Pool

2009 Tax Information Statement

Account Number: 15960
Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
COMMUNITY FDN OF JEWISH FED OF
OC

1 FEDERATION WAY - SUITE #210
IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
ONE FREEDOM VALLEY DRIVE
OAKS, PA 19456

2009 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP	Description	Date		Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
			Acquired	Date of Sale				
Short Term Sales								
18,7710	783925472	REAL ESTATE FUND (SETAX)	12/31/2008	04/15/2009	124.45	153.83	-29.38	0.00
213,5490	783925472	REAL ESTATE FUND (SETAX)	12/31/2008	04/28/2009	1,450.00	1,750.11	-300.11	0.00
136,5630	783925472	REAL ESTATE FUND (SETAX)	12/31/2008	05/15/2009	919.07	1,119.18	-200.11	0.00
283,1250	783925472	REAL ESTATE FUND (SETAX)	12/31/2008	06/16/2009	2,030.00	2,320.31	-290.31	0.00
24,8650	783925472	REAL ESTATE FUND (SETAX)	12/31/2008	08/11/2009	211.60	203.28	8.32	0.00
24,6340	783925472	REAL ESTATE FUND (SETAX)	12/31/2008	11/19/2009	231.81	201.68	30.13	0.00
115,9510	783925472	REAL ESTATE FUND (SETAX)	12/31/2008	12/01/2009	1,109.66	949.58	160.08	0.00
370,8070	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/10/2009	3,422.55	3,598.31	-175.76	0.00
871,1910	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/12/2009	8,058.52	8,454.03	-395.51	0.00
21929,8240	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/24/2009	200,000.00	212,806.75	-12,806.75	0.00
4414,1490	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/27/2009	39,992.19	42,834.85	-2,842.66	0.00
37,7360	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	04/15/2009	348.68	365.85	-17.17	0.00
438,7150	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	04/28/2009	4,062.50	4,253.35	-190.85	0.00
274,5180	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	05/15/2009	2,574.98	2,660.90	-85.92	0.00
468,5100	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	05/21/2009	4,403.99	4,541.26	-137.27	0.00
603,7690	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	06/16/2009	5,687.50	5,851.54	-164.04	0.00
60,8060	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	08/11/2009	592.86	587.48	5.38	0.00

This is important tax information and is being furnished to you.



2009 Tax Information Statement

Account Number: 15960

Recipient's Name and Address

COMMUNITY FDN OF JEWISH FED OF OC

1 FEDERATION WAY - SUITE #210
IRVINE, CA 92603

Recipient's Tax ID number: 95-3645825

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
ONE FREEDOM VALLEY DRIVE
OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks, Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
6226.6490	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	02/24/2009	50,000.00	62,407.36	-12,407.36	0.00
8.7120	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	04/15/2009	75.10	86.86	-11.76	0.00
100.9230	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	04/28/2009	875.00	1,006.20	-131.20	0.00
61.2150	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	05/15/2009	554.61	610.31	-55.70	0.00
129.7670	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	06/16/2009	1,225.00	1,293.77	-68.77	0.00
13.0030	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	08/11/2009	127.69	129.33	-1.64	0.00
8278.1470	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	02/24/2009	50,000.00	69,989.50	-19,989.50	0.00
11.9810	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	04/15/2009	75.12	100.48	-25.36	0.00
135.2400	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	04/28/2009	875.00	1,134.26	-259.26	0.00
81.7990	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	05/15/2009	554.60	685.04	-130.44	0.00
168.0380	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	06/16/2009	1,225.00	1,406.27	-181.27	0.00
16.2660	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	08/11/2009	127.69	135.67	-7.98	0.00
106.5510	783980741	SEI LARGE CAP DIV ALPHA FUND (SCDAX)	12/31/2008	04/15/2009	622.26	652.47	-30.21	0.00
1232.9930	783980741	SEI LARGE CAP DIV ALPHA FUND (SCDAX)	12/31/2008	04/28/2009	7,250.00	7,550.26	-300.26	0.00
755.8130	783980741	SEI LARGE CAP DIV ALPHA FUND (SCDAX)	12/31/2008	05/15/2009	4,595.34	4,628.24	-32.90	0.00

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2009 Tax Information Statement

Account Number: 15960
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
 OC

1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
1608 5580	783980741	SEI LARGE CAP DIV ALPHA FUND (SCDAX)	12/31/2008	06/16/2009	10,150 00	9,850 04	299 96	0 00
26272 6600	783980741	SEI LARGE CAP DIV ALPHA FUND (SCDAX)	12/31/2008	06/30/2009	168,145 02	160,901 13	7,243.89	0 00
152 8930	783980741	SEI LARGE CAP DIV ALPHA FUND (SCDAX)	12/31/2008	08/11/2009	1,058.02	936.59	121 43	0 00
151 5100	783980741	SEI LARGE CAP DIV ALPHA FUND (SCDAX)	12/31/2008	11/19/2009	1,159 05	930 12	228.93	0 00
715.9070	783980741	SEI LARGE CAP DIV ALPHA FUND (SCDAX)	12/31/2008	12/01/2009	5,548 28	4,397 09	1,151 19	0 00
31463 2790	783980733	SEI REAL RETURN PLUS FUND (RRPAX)	12/31/2008	02/24/2009	303,306 00	302,029 77	1,276 23	0 00
34 6950	783980733	SEI REAL RETURN PLUS FUND (RRPAX)	12/31/2008	04/15/2009	348 68	333 06	15 62	0 00
405.4390	783980733	SEI REAL RETURN PLUS FUND (RRPAX)	12/31/2008	04/28/2009	4,062 50	3,892 09	170.41	0 00
256 2170	783980733	SEI REAL RETURN PLUS FUND (RRPAX)	12/31/2008	05/15/2009	2,574 98	2,459.61	115 37	0 00
564 7960	783980733	SEI REAL RETURN PLUS FUND (RRPAX)	12/31/2008	06/16/2009	5,687 50	5,421 88	265 62	0 00
58.6990	783980733	SEI REAL RETURN PLUS FUND (RRPAX)	12/31/2008	08/11/2009	592 86	568.33	24 53	0 00
61 5030	783980733	SEI REAL RETURN PLUS FUND (RRPAX)	12/31/2008	11/19/2009	649 47	595 83	53 64	0 00
293 0210	783980733	SEI REAL RETURN PLUS FUND (RRPAX)	12/31/2008	12/01/2009	3,108 95	2,839 33	269 62	0 00
24 6430	783980709	SEI SMALL CAP FUND (SLPAX)	12/31/2008	04/15/2009	175.95	184 07	-8 12	0 00
278.1550	783980709	SEI SMALL CAP FUND (SLPAX)	12/31/2008	04/28/2009	2,050 00	2,077 71	-27 71	0 00
172 5580	783980709	SEI SMALL CAP FUND (SLPAX)	12/31/2008	05/15/2009	1,299.37	1,288 94	10.43	0 00
360 5530	783980709	SEI SMALL CAP FUND (SLPAX)	12/31/2008	06/16/2009	2,870 00	2,693 19	176.81	0 00

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2009 Tax Information Statement

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Account Number: 15960
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF -
 OC

1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks, Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
7679.7290	783980709	SEI SMALL CAP FUND (SLPAX)	12/31/2008	06/30/2009	62,129.01	57,387.57	4,741.44	0.00
33.3140	783980709	SEI SMALL CAP FUND (SLPAX)	12/31/2008	08/11/2009	299.16	249.04	50.12	0.00
34.2810	783980709	SEI SMALL CAP FUND (SLPAX)	12/31/2008	11/19/2009	327.73	257.00	70.73	0.00
163.0790	783980709	SEI SMALL CAP FUND (SLPAX)	12/31/2008	12/01/2009	1,568.82	1,223.21	345.61	0.00
52.4440	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	04/15/2009	375.50	593.18	-217.68	0.00
617.9380	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	04/28/2009	4,375.00	6,989.35	-2,614.35	0.00
356.8920	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	05/15/2009	2,773.05	4,036.72	-1,263.67	0.00
748.7780	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	06/16/2009	6,125.00	8,445.61	-2,320.61	0.00
22166.6600	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	06/30/2009	183,096.61	250,021.93	-66,925.32	0.00
70.7830	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	08/11/2009	638.46	797.85	-159.39	0.00
<i>January 2009</i>					1,167,897.74	1,275,868.55	-107,970.81	0.00
Total Short Term Sales					5479,835.47	7,753,643.37	-2,280,778.90	
Long Term 15% Sales								
64.3040	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	11/19/2009	649.47	621.70	27.77	0.00
306.9050	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	12/01/2009	3,108.95	2,968.07	140.88	0.00
13.1480	783980758	SEI EMERGING MKRKT DEBT FUND (SEDAX)	08/25/2008	11/19/2009	139.89	130.96	8.93	0.00

This is important tax information and is being furnished to you.

2009 Tax Information Statement

Account Number: 15960
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
63.4710	783980758	SEI EMERGING MKRKT DEBT FUND (SEDAX)	08/25/2008	12/01/2009	669.62	632.28	37.34	0.00
16.5160	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	11/19/2009	139.89	137.66	2.23	0.00
78.8720	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	12/01/2009	669.62	657.51	12.11	0.00
70.0830	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	11/19/2009	699.43	789.29	-89.86	0.00
329.2130	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	12/01/2009	3,348.10	3,706.98	-358.88	0.00
Total Long Term 15% Sales						9,644.45	-219.48	0.00

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Activity Detail Section (continued)

Statement of Value and Activity

January 1, 2009 - January 31 2009

Date	Transaction Description	Cash	Tax Cost
1/2/09	Sold 527,220 423 Units of SEI Large Cap Disciplined Equity 295 Trade Date 12/31/08	\$3,843,436 88	-\$5,694,495 05
	St Capital Loss of \$1,851,058 17- on Federal Cost Federal Tax Cost \$5,694,495 05		
1/2/09	527,220 423 Units At \$7 29 Sold 93,126 991 Units of SEI Core Fixed Income Fund #285 Trade Date 12/31/08	\$853,043 24	-\$904,953 72
	St Capital Loss of \$51,910 48- on Federal Cost Federal Tax Cost \$904,953 72		
1/2/09	93,126 991 Units At \$9 16 Sold 89,440 901 Units of SEI Small/Mid Cap Equity Fd 296 Trade Date 12/31/08	\$655,601 80	-\$996,063 67
	St Capital Loss of \$340,461 87- on Federal Cost Federal Tax Cost \$996,063 67		
1/2/09	89,440 901 Units At \$7 33 Sold 9,700 279 Units of Silt Emerging Markets Debt Fund #270 Trade Date 12/31/08	\$77,893 24	-\$97,371 50
	St Capital Loss of \$19,478 26- on Federal Cost Federal Tax Cost \$97,371 50		
1/2/09	9,700 279 Units At \$8 03 Sold 6,443 77 Units of Silt High Yield Bond #284 Trade Date 12/31/08	\$38,984 81	-\$54,952 69
	St Capital Loss of \$15,967 88- on Federal Cost Federal Tax Cost \$54,952 69		
1/6/09	6,443 77 Units At \$6 05 Sold 518 808 Units of SEI Small/Mid Cap Equity Fd 296 Trade Date 1/5/09	\$3,875 50	-\$5,777 74
	St Capital Loss of \$1,902 24- on Federal Cost Federal Tax Cost \$5,777 74		
	518 808 Units At \$7 47		
	Loss < \$2,280,778.80 >	\$5,472,835.47	\$7,753,614.37

Account Number:
Tax ID Number:

2009 Tax Information Statement
COMMUNITY FDN OF JEWISH FED OF OC

From:
SEI PRIVATE TRUST COMPANY
ONE FREEDOM VALLEY DRIVE
OAKS, PA 19456

CFJFOC-AMERICAN JEWISH COMMITTEE

Contents

Letter	2
Tax Summary	3
Summary of Foreign Investments	5
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Dividends and Interest Detail	13
Other Tax Information	16

Mail to:

COMMUNITY FDN OF JEWISH FED OF OC
C/O MYRNA SHIELDS
1 FEDERATION WAY - SUITE #210
IRVINE, CA 92603

Questions?

If you have any questions regarding this tax information statement, please call SEI PRIVATE TRUST COMPANY at (888)734-2010

Important Tax Information



2009 Tax Information Statement

Page 6 of 16

Account Number: 15960-AJC
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED QF
 OC

1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

2009 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks, Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
Short Term Sales								
7800	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	01/20/2009	7.20	7.58	-0.38	0.00
2.3130	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/10/2009	21.35	22.46	-1.11	0.00
8220	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/11/2009	7.60	7.98	-0.38	0.00
5.6150	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/12/2009	51.94	54.53	-2.59	0.00
8000	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	03/16/2009	7.20	7.77	-0.57	0.00
7360	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	04/15/2009	6.80	7.14	-0.34	0.00
21.1660	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	04/28/2009	196.00	205.45	-9.45	0.00
5.2670	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	05/21/2009	49.51	51.11	-1.60	0.00
7680	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	05/26/2009	7.20	7.45	-0.25	0.00
2.0150	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	06/22/2009	19.00	19.55	-0.55	0.00
8340	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	07/20/2009	8.00	8.09	-0.09	0.00
158.2080	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	07/31/2009	1,539.36	1,534.99	4.37	0.00
2.1270	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	08/11/2009	20.74	20.64	0.10	0.00
33.4010	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	08/20/2009	328.00	324.07	3.93	0.00
1120	783980758	SEI EMERGING MKRKT DEBT FUND (SEDAX)	08/25/2008	01/20/2009	0.90	1.12	-0.22	0.00
1170	783980758	SEI EMERGING MKRKT DEBT FUND (SEDAX)	08/25/2008	02/11/2009	0.95	1.17	-0.22	0.00

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2009 Tax Information Statement

Account Number: 15960-AJC
 Recipient's Tax ID number: 95-3645825
 Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
1100	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	08/25/2008	03/16/2009	0.90	1.10	-0.20	0.00
0990	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	08/25/2008	04/15/2009	0.85	0.99	-0.14	0.00
2 8260	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	08/25/2008	04/28/2009	24.50	28.24	-3.74	0.00
0980	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	08/25/2008	05/26/2009	0.90	0.98	-0.08	0.00
1060	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	08/25/2008	07/20/2009	1.00	1.06	-0.06	0.00
38 5510	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	08/25/2008	07/31/2009	370.86	384.58	-13.72	0.00
2640	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	08/25/2008	08/11/2009	2.59	2.63	-0.04	0.00
4,1580	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	08/25/2008	08/20/2009	41.00	41.48	-0.48	0.00
1450	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	01/20/2009	0.90	1.23	-0.33	0.00
1520	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	02/11/2009	0.95	1.29	-0.34	0.00
1530	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	03/16/2009	0.90	1.29	-0.39	0.00
1360	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	04/15/2009	0.85	1.15	-0.30	0.00
3,7870	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	04/28/2009	24.50	31.90	-7.40	0.00
1290	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	05/26/2009	0.89	1.08	-0.19	0.00
1360	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	07/20/2009	1.00	1.14	-0.14	0.00

This is important tax information and is being furnished to you.

2009 Tax Information Statement

Page 8 of 16

Account Number: 15960-AJC
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED QF
 OC

1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks, Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
3300	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	08/11/2009	2 59	2 77	-0 18	0 00
5 2840	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	08/20/2009	41 00	44 33	-3 33	0 00
.8650	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	01/20/2009	5 62	9 10	-3 48	0 00
8740	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	02/11/2009	5 89	9 19	-3 30	0 00
.9220	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	03/16/2009	5 59	9 70	-4 11	0 00
.7780	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	04/15/2009	5 28	8 16	-2 88	0 00
22 3020	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	04/28/2009	152 10	234 03	-81 93	0 00
.7600	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	05/26/2009	5 54	7 98	-2 44	0 00
8080	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	07/20/2009	6 18	8 47	-2 29	0 00
2 0080	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	08/11/2009	16 06	20 62	-4 56	0 00
31 3130	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	08/20/2009	253 95	321 52	-67 57	0 00
.1740	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	01/20/2009	1 13	1 86	-0 73	0 00
1800	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	02/11/2009	1 23	1 93	-0 70	0 00

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2009 Tax Information Statement

Page 9 of 16

Account Number: 15960-AJC
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
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 1 FEDERATION WAY - SUITE #210
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SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
1930	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	03/16/2009	1.16	2.07	-0.91	0.00
1540	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	04/15/2009	1.09	1.65	-0.56	0.00
43240	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	04/28/2009	31.65	46.19	-14.54	0.00
1560	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	05/26/2009	1.22	1.67	-0.45	0.00
1620	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	07/20/2009	1.32	1.73	-0.41	0.00
3880	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	08/11/2009	3.39	4.14	-0.75	0.00
60650	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	08/20/2009	53.55	64.67	-11.12	0.00
3410	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	01/20/2009	2.25	3.83	-1.58	0.00
3470	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	02/11/2009	2.38	3.90	-1.52	0.00
3570	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	03/16/2009	2.25	4.01	-1.76	0.00
2970	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	04/15/2009	2.13	3.34	-1.21	0.00
86510	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	04/28/2009	61.25	97.21	-35.96	0.00
2730	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	05/26/2009	2.25	3.07	-0.82	0.00

This is important tax information and is being furnished to you.

2009 Tax Information Statement

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Account Number: 15960-AJC
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
2910	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	07/20/2009	2 50	3.27	-0.77	0.00
7180	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	08/11/2009	6 48	8 07	-1.59	0.00
11 2270	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	08/20/2009	102 50	126.16	-23.66	0.00
Total Short Term Sales						3,835.88	-312.01	0.00
Long Term 15% Sales								
33 0380	783980204	SEI CORE FIXED INCOME FUND (SCQAX)	08/25/2008	09/23/2009	328.40	320.57	7.83	0.00
32 7490	783980204	SEI CORE FIXED INCOME FUND (SCQAX)	08/25/2008	10/19/2009	328.80	317.81	10.99	0.00
2.2030	783980204	SEI CORE FIXED INCOME FUND (SCQAX)	08/25/2008	11/19/2009	22.25	21.38	0.87	0.00
32 4580	783980204	SEI CORE FIXED INCOME FUND (SCQAX)	08/25/2008	12/01/2009	328.80	315.09	13.71	0.00
32 7160	783980204	SEI CORE FIXED INCOME FUND (SCQAX)	08/25/2008	12/22/2009	328.80	317.60	11.20	0.00
3 8980	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	09/23/2009	41 05	38.89	2.16	0.00
3 8700	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	10/19/2009	41 10	38.65	2.45	0.00
2610	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	11/19/2009	2 78	2.61	0.17	0.00
3 8960	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	12/01/2009	41.10	38.91	2.19	0.00
3 8590	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	12/22/2009	41 10	38.54	2.56	0.00

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2009 Tax Information Statement

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Account Number: 15960-AJC
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
24.5850	783980758	SEI EMERGING MKRTS DEBT FUND (SEDAX)	08/25/2008	12/31/2009	253.23	245.79	7.44	0.00
5.0230	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	09/23/2009	41.04	42.12	-1.08	0.00
4.9400	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	10/19/2009	41.10	41.41	-0.31	0.00
3.280	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	11/19/2009	2.78	2.75	0.03	0.00
4.8410	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	12/01/2009	41.10	40.59	0.51	0.00
4.7620	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	12/22/2009	41.10	39.93	1.17	0.00
72.2100	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	12/31/2009	624.62	605.45	19.17	0.00
29.6710	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	09/23/2009	253.69	304.66	-50.97	0.00
28.8020	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	10/19/2009	253.75	295.52	-41.77	0.00
1.9360	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	11/19/2009	17.11	19.86	-2.75	0.00
28.4350	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	12/01/2009	254.49	291.75	-37.26	0.00
28.0890	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	12/22/2009	254.49	288.20	-33.71	0.00
84.3260	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	12/31/2009	753.87	864.13	-110.26	0.00
5.6450	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	09/23/2009	54.19	60.20	-6.01	0.00
5.5270	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	10/19/2009	54.50	58.92	-4.42	0.00

This is important tax information and is being furnished to you.

2009 Tax Information Statement

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Account Number: 15960-AJC
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED GF
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
.3980	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	11/19/2009	3.75	4.24	-0.49	0.00
5.6470	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	12/01/2009	53.76	60.20	-6.44	0.00
5.3490	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	12/22/2009	53.76	57.02	-3.26	0.00
10.4240	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	12/31/2009	104.66	111.12	-6.46	0.00
10.4190	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	09/23/2009	102.63	117.08	-14.45	0.00
10.0240	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	10/19/2009	102.75	112.64	-9.89	0.00
.6960	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	11/19/2009	6.95	7.82	-0.87	0.00
10.1030	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	12/01/2009	102.75	113.53	-10.78	0.00
10.3270	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	12/22/2009	102.75	116.05	-13.30	0.00
Total Long Term 15% Sales						5,079.00	-272.03	0.00

This is important tax information and is being furnished to you.



2009 Tax Information Statement

COMMUNITY FDN OF JEWISH FED OF OC

From:

SEI PRIVATE TRUST COMPANY
ONE FREEDOM VALLEY DRIVE
OAKS, PA 19456

CFJFOC-HERITAGE PT OPERATING RESERVE

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Summary of Foreign Investments.....	5
Proceeds from Broker and Barter Exchange Transactions	6
Dividends and Interest Detail	11
Other Tax Information	14

Mail to:

COMMUNITY FDN OF JEWISH FED OF OC
C/O MYRNA SHIELDS
1 FEDERATION WAY - SUITE #210
IRVINE, CA 92603

Questions?

If you have any questions regarding this tax information statement, please call SEI PRIVATE TRUST COMPANY at (888)734-2010

Duff \$156.77

Important Tax Information



2009 Tax Information Statement

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Account Number: 15960-HER
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

2009 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
Short Term Sales								
15,1850	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	01/20/2009	140 16	147 52	-7 36	0 00
15 5680	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/11/2009	144 00	151 20	-7 20	0 00
15 5730	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	03/16/2009	140 16	151 21	-11 05	0 00
14 8900	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	05/26/2009	139 52	144 50	-4 98	0 00
15 4060	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	06/22/2009	145 28	149 49	-4 21	0 00
5086 2690	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	06/30/2009	48,268 69	49,353 54	-1,084 85	0 00
15 6500	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	07/20/2009	150 08	151 84	-1 76	0 00
1 9000	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	01/20/2009	15 33	19 07	-3 74	0 00
1 9470	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	02/11/2009	15 75	19 55	-3 80	0 00
1 8720	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	03/16/2009	15 33	18 79	-3 46	0 00
1 6620	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	05/26/2009	15 26	16 61	-1 35	0 00
1 7120	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	06/22/2009	15 89	17 11	-1 22	0 00
1 7490	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	07/20/2009	16 42	17 45	-1 03	0 00
2 4690	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	01/20/2009	15 33	20 99	-5 66	0 00

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2009 Tax Information Statement

Account Number: 15960-HER
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
2 5200	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	02/11/2009	15.75	21.36	-5.61	0.00
2 6120	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	03/16/2009	15.33	22.08	-6.75	0.00
2 2080	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	05/26/2009	15.26	18.57	-3.31	0.00
2 2070	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	06/22/2009	15.89	18.55	-2.66	0.00
2 2300	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	07/20/2009	16.41	18.72	-2.31	0.00
15 4980	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	01/20/2009	100.74	167.44	-66.70	0.00
15 3560	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	02/11/2009	103.50	165.90	-62.40	0.00
16 6240	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	03/16/2009	100.74	179.60	-78.86	0.00
13 7560	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	05/26/2009	100.28	148.21	-47.93	0.00
14 5430	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	06/22/2009	104.42	156.69	-52.27	0.00
14 1010	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	07/20/2009	107.87	146.37	-38.50	0.00
2 7040	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	01/20/2009	17.52	30.13	-12.61	0.00
2 6390	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	02/11/2009	18.00	29.40	-11.40	0.00
2 9100	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	03/16/2009	17.52	32.42	-14.90	0.00

This is important tax information and is being furnished to you.

2009 Tax Information Statement

Account Number: 15960-HER
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
 OC

1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
2 2300	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	05/26/2009	17 44	24 79	-7 35	0 00
2 3830	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	06/22/2009	18 16	26 49	-8 33	0 00
2 2990	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	07/20/2009	18 76	25 50	-6 74	0 00
5 3090	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	01/20/2009	35 04	62 26	-27 22	0 00
5 2550	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	02/11/2009	36 00	61 62	-25 62	0 00
5 5620	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	03/16/2009	35 04	65 22	-30 18	0 00
4 2330	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	05/26/2009	34 88	49 61	-14 73	0 00
4 5510	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	06/22/2009	36 32	53 33	-17 01	0 00
4 3680	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	07/20/2009	37 52	50 41	-12 89	0 00
Total Short Term Sales						50,255.59	-1,697.95	0.00
Long Term 15% Sales								
15 8390	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	09/23/2009	157 44	153 69	3 75	0 00
16 0000	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	10/19/2009	160 64	155 27	5 37	0 00
16 2690	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	12/01/2009	164 80	157 93	6 87	0 00

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Account Number: 15960-HER
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address

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1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

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SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
16 3340	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	12/22/2009	164 16	158 56	5 60	0 00
1 6350	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	09/23/2009	17 22	16 31	0 91	0 00
1459 8140	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	09/30/2009	15,488 63	14,565 13	923 50	0 00
1 6540	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	10/19/2009	17 57	16 52	1 05	0 00
1 7090	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	12/01/2009	18 03	17 07	0 96	0 00
1 6860	783980758	SEI EMERGING MRKTS DEBT FUND (SEDAX)	08/25/2008	12/22/2009	17 96	16 84	1 12	0 00
2 1080	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	09/23/2009	17 22	17 68	-0 46	0 00
1330 5710	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	09/30/2009	10,923 99	11,156 58	-232 59	0 00
2 1120	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	10/19/2009	17 57	17 71	-0 14	0 00
2 1220	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	12/01/2009	18 02	17 79	0 23	0 00
2 0800	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	08/25/2008	12/22/2009	17 95	17 44	0 51	0 00
13 2350	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	09/23/2009	113 16	137 38	-24 22	0 00
2910 9810	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	09/30/2009	24,801 56	30,216 09	-5,414 53	0 00
13 1060	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	10/19/2009	115 46	135 94	-20 48	0 00
13 2350	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	12/01/2009	118 45	137 27	-18 82	0 00

This is important tax information and is being furnished to you.

2009 Tax Information Statement

Page 10 of 14

Account Number: 15960-HER
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
 OC

1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
13 0230	783980824	SEI LARGE CAP DISCPL EQ FUND (SCPAX)	08/25/2008	12/22/2009	117 99	135 07	-17 08	0 00
2 0500	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	09/23/2009	19 68	22 74	-3 06	0 00
2 0370	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	10/19/2009	20 08	22 59	-2 51	0 00
2 1640	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	12/01/2009	20 60	23 99	-3 39	0 00
2 0420	783980816	SEI SMALL/MID CAP EQTY FUND (SSMAX)	08/25/2008	12/22/2009	20 52	22 64	-2 12	0 00
3 9960	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	09/23/2009	39 36	46 11	-6 75	0 00
3 9180	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	10/19/2009	40 16	45 21	-5 05	0 00
4 0510	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	12/01/2009	41 20	46 75	-5 55	0 00
4 1250	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	08/25/2008	12/22/2009	41 04	47 60	-6 56	0 00
Total Long Term 15% Sales						52,710 46	-4,813 44	0 00

This is important tax information and is being furnished to you.



Account Number:
Tax ID Number:

2009 Tax Information Statement

COMMUNITY FDN OF JEWISH FED OF OC

From:

SEI PRIVATE TRUST COMPANY
ONE FREEDOM VALLEY DRIVE
OAKS, PA 19456

CFJFOC-S & A FAINBARG

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Mail to:

COMMUNITY FDN OF JEWISH FED OF OC
C/O MYRNA SHIELDS
1 FEDERATION WAY - SUITE #210
IRVINE, CA 92603

Questions?

If you have any questions regarding this tax information statement, please call SEI PRIVATE TRUST COMPANY at (888)734-2010

Important Tax Information



2009 Tax Information Statement

Account Number: 15960-FAIN
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED. OF
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

2009 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks, Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
Short Term Sales								
58,288	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	01/20/2009	538.00	566.16	-28.16	0.00
27,356	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/10/2009	252.50	265.64	-13.14	0.00
60,000	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/11/2009	555.00	582.64	-27.64	0.00
74,114	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/12/2009	685.55	719.70	-34.15	0.00
61,889	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	03/16/2009	557.00	600.82	-43.82	0.00
59,740	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	04/15/2009	552.00	579.82	-27.82	0.00
76,259	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	05/21/2009	716.83	739.99	-23.16	0.00
59,765	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	05/26/2009	560.00	579.94	-19.94	0.00
365,164	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	05/26/2009	34,277.00	35,497.45	-1,220.45	0.00
57,158	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	06/22/2009	539.00	554.56	-15.56	0.00
57,456	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	07/20/2009	551.00	557.40	-6.40	0.00
73,889	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	08/11/2009	720.42	716.83	3.59	0.00
56,721	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	08/20/2009	557.00	550.27	6.73	0.00
Total Short Term Sales						41,061.30	-1,449.92	0.00
Long Term 15% Sales								
57,646	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	09/23/2009	573.00	559.29	13.71	0.00

This is important tax information and is being furnished to you.



2009 Tax Information Statement

Account Number: 15960-FAIN
 Recipient's Tax ID number: 95-3645825

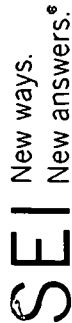
Recipient's Name and Address

COMMUNITY FDN OF JEWISH FED.OF -
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
58 0680	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	10/19/2009	583.00	563.45	19.55	0.00
72.7450	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	11/19/2009	734.72	705.98	28.74	0.00
58 4400	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	12/01/2009	592.00	567.26	24.74	0.00
59.7010	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	12/22/2009	600.00	579.50	20.50	0.00
Total Long Term 15% Sales						2,975.48	107.24	0.00



2009 Tax Information Statement

COMMUNITY FDN OF JEWISH FED OF OC

From:

SEI PRIVATE TRUST COMPANY
ONE FREEDOM VALLEY DRIVE
OAKS, PA 19456

CFJFOC-ANNA FEUERSTEIN MEMORIAL A&R

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Mail to:

COMMUNITY FDN OF JEWISH FED OF OC
C/O MYRNA SHIELDS
1 FEDERATION WAY - SUITE #210
IRVINE, CA 92603

Questions?

If you have any questions regarding this tax information statement, please call SEI PRIVATE TRUST COMPANY at (888)734-2010



Important Tax Information

2009 Tax Information Statement

Account Number: 15960-ANNA
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

2009 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks, Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
Short Term Sales								
56 5550	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	01/20/2009	522 00	549 35	-27 35	0 00
26 5680	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/10/2009	245 22	258 00	-12 78	0 00
58 2700	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/11/2009	539 00	565 86	-26 86	0 00
71 9770	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/12/2009	665 79	698 97	-33 18	0 00
60 1110	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	03/16/2009	541 00	583 58	-42 58	0 00
58 0090	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	04/15/2009	536 00	563 04	-27 04	0 00
74 0310	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	05/21/2009	695 89	718 39	-22 50	0 00
58 0580	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	05/26/2009	544 00	563 39	-19 39	0 00
58 5370	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	06/22/2009	552 00	567 96	-15 96	0 00
58 7070	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	07/20/2009	563 00	569 55	-6 55	0 00
73 5750	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	08/11/2009	717 36	713 81	3 55	0 00
57 9430	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	08/20/2009	569 00	562 15	6 85	0 00
Total Short Term Sales						6,690.26	-223.79	0.00
Long Term 15% Sales								
58 9540	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	09/23/2009	586 00	572 00	14 00	0 00
59 2630	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	10/19/2009	595 00	575 06	19 94	0 00

This is important tax information and is being furnished to you.



2009 Tax Information Statement

Account Number: 15960-ANNA
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address

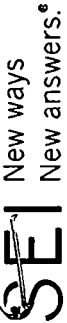
COMMUNITY FDN OF JEWISH FED OF
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
74 3490	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	11/19/2009	750.92	721.57	29.35	0.00
59.7240	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	12/01/2009	605.00	579.74	25.26	0.00
60 9950	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	12/22/2009	613.00	592.08	20.92	0.00
Total Long Term 15% Sales						3,040.45	109.47	0.00

This is important tax information and is being furnished to you.



2009 Tax Information Statement

COMMUNITY FDN OF JEWISH FED OF OC

From:

SEI PRIVATE TRUST COMPANY
ONE FREEDOM VALLEY DRIVE
OAKS, PA 19456

CFJFOC-ROBERTA FEUERSTEIN

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Mail to:

COMMUNITY FDN OF JEWISH FED OF OC
C/O MYRNA SHIELDS
1 FEDERATION WAY - SUITE #210
IRVINE, CA 92603

Questions?

If you have any questions regarding this tax information statement, please call SEI PRIVATE TRUST COMPANY at (888)734-2010



Important Tax Information

2009 Tax Information Statement

Account Number: 15960-ROBERT
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

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SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

2009 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
Short Term Sales								
6.8260	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	01/20/2009	63.00	66.30	-3.30	0.00
3.1940	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/10/2009	29.48	31.02	-1.54	0.00
6.7030	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/11/2009	62.00	65.09	-3.09	0.00
8.5370	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	02/12/2009	78.97	82.90	-3.93	0.00
6.8890	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	03/16/2009	62.00	66.88	-4.88	0.00
6.6020	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	04/15/2009	61.00	64.08	-3.08	0.00
8.5310	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	05/21/2009	80.19	82.78	-2.59	0.00
6.6170	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	05/26/2009	62.00	64.21	-2.21	0.00
6.6810	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	06/22/2009	63.00	64.82	-1.82	0.00
6.7780	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	07/20/2009	65.00	65.76	-0.76	0.00
8.4510	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	08/11/2009	82.40	81.99	0.41	0.00
6.6190	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	08/20/2009	65.00	64.22	0.78	0.00
Total Short Term Sales						774.04	-26.01	0.00
Long Term 15% Sales								
6.7400	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	09/23/2009	67.00	65.39	1.61	0.00
6.7730	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	10/19/2009	68.00	65.72	2.28	0.00

This is important tax information and is being furnished to you.



2009 Tax Information Statement

Page 5 of 7

Account Number: 15960-ROBERT
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
8.5410	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	11/19/2009	86.26	82.89	3.37	0.00
6.8110	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	12/01/2009	69.00	66.11	2.89	0.00
6.9650	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	12/22/2009	70.00	67.61	2.39	0.00
Total Long Term 15% Sales						347.72	12.54	0.00

This is important tax information and is being furnished to you.

Account Number:
Tax ID Number:

2009 Tax Information Statement

COMMUNITY FDN OF JEWISH FED OF OC

From:

SEI PRIVATE TRUST COMPANY
ONE FREEDOM VALLEY DRIVE
OAKS, PA 19456

CFJFOC-PHILANTHROPIC FUNDS

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Questions?

If you have any questions regarding this tax information statement, please call SEI PRIVATE TRUST COMPANY at (888)734-2010

Mail to:

COMMUNITY FDN OF JEWISH FED OF OC
C/O MYRNA SHIELDS
1 FEDERATION WAY - SUITE #210
IRVINE, CA 92603

Important Tax Information



2009 Tax Information Statement

Page 4 of 6

Account Number: 15960-PHIL
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address

COMMUNITY FDN OF JEWISH FED OF

OC

1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

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SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

2009 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks, Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
Short Term Sales								
4049.6760	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	04/28/2009	37,500.00	39,436.73	-1,936.73	0.00
3184.9680	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	05/15/2009	29,875.00	31,016.00	-1,141.00	0.00
7430.9980	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	06/16/2009	70,000.00	72,348.74	-2,348.74	0.00
1325.5570	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	06/22/2009	12,500.00	12,905.72	-405.72	0.00
24222.7000	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	06/30/2009	229,873.42	235,833.97	-5,960.55	0.00
7796.2580	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	07/28/2009	75,000.00	75,904.93	-904.93	0.00
Total Short Term Sales						454,748.42	-12,697.67	0.00
Long Term 15% Sales								
4656.9120	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	09/16/2009	46,150.00	45,340.03	809.97	0.00
5688.6230	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	10/01/2009	57,000.00	55,384.85	1,615.15	0.00
1469.1240	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	10/19/2009	14,750.00	14,303.50	446.50	0.00
493.5830	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	12/01/2009	5,000.00	4,805.56	194.44	0.00
10633.4650	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	12/01/2009	107,717.00	103,528.19	4,188.81	0.00
Total Long Term 15% Sales						230,617.00	7,254.87	0.00

This is important tax information and is being furnished to you.

2009 Tax Information Statement

Page 4 of 7

Account Number: 15960-SFIM
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
 OC

1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

2009 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal
								Income Tax Withheld
Short Term Sales								
20000 0000	3133M94H2	FHLB 6.525% 6/17/09	04/29/2009	06/17/2009	20,000.00	20,153.80	-153.80	0.00
Total Short Term Sales						20,153.80	-153.80	0.00

This is important tax information and is being furnished to you.



From:
SEI PRIVATE TRUST COMPANY
ONE FREEDOM VALLEY DRIVE
OAKS, PA 19456

CFJFOC-JEWISH FAMILY SERVICE OF OC

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Mail to:

COMMUNITY FDN OF JEWISH FED OF OC
C/O MYRNA SHIELDS
1 FEDERATION WAY - SUITE #210
IRVINE, CA 92603

Questions?

If you have any questions regarding this tax information statement, please call SEI PRIVATE TRUST COMPANY at (888)734-2010

Important Tax Information



2009 Tax Information Statement

Page 5 of 9

Account Number: 15960-JFS-MM
 Recipient's Tax ID number: 95-3645825
 Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

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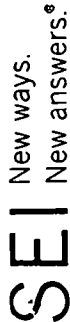
SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

2009 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks, Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
Short Term Sales								
457.6380	783925472	REAL ESTATE FUND (SETAX)	03/17/2009	06/24/2009	3,189.74	3,750.50	-560.76	0.00
762.1710	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	03/17/2009	06/24/2009	7,187.27	7,387.73	-200.46	0.00
184.9030	783980758	SEI EMERGING MKRKT DEBT FUND (SEDAX)	03/17/2009	06/24/2009	1,719.60	1,843.66	-124.06	0.00
248.4630	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	03/17/2009	06/24/2009	1,786.45	2,082.78	-296.33	0.00
2393.0730	783980741	SEI LARGE CAP DIV ALPHA FUND (SCDAX)	03/17/2009	06/24/2009	14,980.64	14,654.02	326.62	0.00
717.6050	783980733	SEI REAL RETURN PLUS FUND (RRPAX)	03/17/2009	06/24/2009	7,176.05	6,888.80	287.25	0.00
559.6040	783980709	SEI SMALL CAP FUND (SLPAX)	03/17/2009	06/24/2009	4,381.70	4,180.03	201.67	0.00
1172.4050	783980774	SEI WORLD EQUITY EX-US FUND (WEUSX)	03/17/2009	06/24/2009	9,578.55	13,260.79	-3,682.24	0.00
Total Short Term Sales						50,000.00	-4,048.31	0.00

This is important tax information and is being furnished to you.



2009 Tax Information Statement

Page 1 of 8
 Account Number: 15960-CSH
 Tax ID Number: 95-3645825
 From: 01/01/2009 To: 12/31/2009

COMMUNITY FDN OF JEWISH FED OF OC

From:

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

CFJFOC-CONGREGATION SHIR HA-MA-ALOT

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Mail to:

COMMUNITY FDN OF JEWISH FED OF OC
 C/O MYRNA SHIELDS
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

Questions?

If you have any questions regarding this tax information statement, please call SEI PRIVATE TRUST COMPANY at (888)734-2010



Important Tax Information

2009 Tax Information Statement

Account Number: 15960-CSH
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED•OF •
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

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SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

2009 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks, Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
Short Term Sales								
2 3380	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	03/31/2009	04/15/2009	21.60	22.67	-1.07	0.00
213 2200	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	03/31/2009	05/15/2009	2,000.00	2,067.24	-67.24	0.00
8 6340	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	03/31/2009	05/21/2009	81.16	83.71	-2.55	0.00
2 3050	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	03/31/2009	05/26/2009	21.60	22.35	-0.75	0.00
2 3750	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	03/31/2009	06/22/2009	22.40	23.02	-0.62	0.00
2 3360	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	03/31/2009	07/20/2009	22.40	22.63	-0.23	0.00
4 9470	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	03/31/2009	08/06/2009	48.04	47.92	0.12	0.00
2 2810	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	03/31/2009	08/20/2009	22.40	22.10	0.30	0.00
2 3340	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	03/31/2009	09/23/2009	23.20	22.61	0.59	0.00
2 3110	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	03/31/2009	10/19/2009	23.20	22.39	0.81	0.00
5 0040	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	03/31/2009	10/27/2009	50.29	48.48	1.81	0.00
2 3690	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	03/31/2009	12/01/2009	24.00	22.96	1.04	0.00
2 4680	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	03/31/2009	12/22/2009	24.80	23.92	0.88	0.00
3 130	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	03/31/2009	04/15/2009	2.70	3.13	-0.43	0.00
27 5940	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	03/31/2009	05/15/2009	250.00	276.28	-26.28	0.00

This is important tax information and is being furnished to you.

2009 Tax Information Statement

Account Number: 15960-CSH
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED QF
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
.2940	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	03/31/2009	05/26/2009	2.70	2.94	-0.24	0.00
.3020	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	03/31/2009	06/22/2009	2.80	3.02	-0.22	0.00
83.3570	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	03/31/2009	06/30/2009	788.56	834.58	-46.02	0.00
.2980	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	03/31/2009	07/20/2009	2.80	2.98	-0.18	0.00
.6100	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	03/31/2009	08/06/2009	6.00	6.10	-0.10	0.00
2840	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	03/31/2009	08/20/2009	2.80	2.84	-0.04	0.00
.2750	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	03/31/2009	09/23/2009	2.90	2.75	0.15	0.00
.2730	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	03/31/2009	10/19/2009	2.90	2.73	0.17	0.00
5990	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	03/31/2009	10/27/2009	6.28	5.99	0.29	0.00
2840	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	03/31/2009	12/01/2009	3.00	2.84	0.16	0.00
2910	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	03/31/2009	12/22/2009	3.10	2.91	0.19	0.00
48.3680	783980758	SEI EMERGING MKRKS DEBT FUND (SEDAX)	03/31/2009	12/31/2009	498.19	484.48	13.71	0.00
4310	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	03/31/2009	04/15/2009	2.70	3.63	-0.93	0.00

This is important tax information and is being furnished to you.

2009 Tax Information Statement

Account Number: 15960-CSH
 Recipient's Tax ID number: 95-3645825

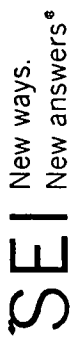
Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks, Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
36 8730	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	03/31/2009	05/15/2009	250.00	309.77	-59.77	0.00
3910	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	03/31/2009	05/26/2009	2.70	3.28	-0.58	0.00
3890	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	03/31/2009	06/22/2009	2.80	3.27	-0.47	0.00
122.3410	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	03/31/2009	06/30/2009	885.75	1,027.05	-141.30	0.00
3800	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	03/31/2009	07/20/2009	2.80	3.19	-0.39	0.00
7700	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	03/31/2009	08/06/2009	6.01	6.45	-0.44	0.00
3610	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	03/31/2009	08/20/2009	2.80	3.02	-0.22	0.00
3550	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	03/31/2009	09/23/2009	2.90	2.97	-0.07	0.00
3490	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	03/31/2009	10/19/2009	2.90	2.92	-0.02	0.00
7490	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	03/31/2009	10/27/2009	6.29	6.27	0.02	0.00
3530	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	03/31/2009	12/01/2009	3.00	2.96	0.04	0.00
3590	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	03/31/2009	12/22/2009	3.10	3.01	0.09	0.00
115 5730	783980303	SEI HIGH YIELD BOND FUND (SGYAX)	03/31/2009	12/31/2009	999.71	967.87	31.84	0.00
Total Short Term Sales						6,431.23	-297.95	0.00

This is important tax information and is being furnished to you.



2009 Tax Information Statement

COMMUNITY FDN OF JEWISH FED OF OC

Account Number:
Tax ID Number:

From:

SEI PRIVATE TRUST COMPANY
ONE FREEDOM VALLEY DRIVE
OAKS, PA 19456

CFJFOC-LINDA & ORY SCHWARTZ FAM CHAR

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Tax Summary	3
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Dividends and Interest Detail	5
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Mail to:

COMMUNITY FDN OF JEWISH FED OF OC
C/O MYRNA SHIELDS
1 FEDERATION WAY - SUITE #210
IRVINE, CA 92603

Questions?

If you have any questions regarding this tax information statement, please call SEI PRIVATE TRUST COMPANY at (888)734-2010

Important Tax Information



2009 Tax Information Statement

Page 4 of 6

Account Number: 15960-SCHW
 Recipient's Tax ID number: 95-3645825

Recipient's Name and Address
 COMMUNITY FDN OF JEWISH FED OF
 OC
 1 FEDERATION WAY - SUITE #210
 IRVINE, CA 92603

☐ Corrected ☐ 2nd TIN notice

SEI PRIVATE TRUST COMPANY
 ONE FREEDOM VALLEY DRIVE
 OAKS, PA 19456

2009 Proceeds from Broker and Barter Exchange Transactions

Sales are listed at Gross Proceeds less commissions and option premiums.

Number of shares	CUSIP	Description	Date Acquired	Date of Sale	Stocks Bonds, etc.	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld
Short Term Sales								
1 9770	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	01/20/2009	18.25	19.22	-0.97	0.00
14 0830	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	03/16/2009	126.75	136.49	-9.74	0.00
10 3260	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	05/26/2009	96.75	100.04	-3.29	0.00
1 8290	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	06/22/2009	17.25	17.72	-0.47	0.00
210 0500	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	06/30/2009	1,993.37	2,034.66	-41.29	0.00
10 9230	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	07/20/2009	104.75	105.80	-1.05	0.00
Total Short Term Sales					2,357.12	2,413.93	-56.81	0.00
Long Term 15% Sales								
206.0460	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	08/31/2009	2,031.61	1,995.71	35.90	0.00
53.1940	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	09/23/2009	528.75	515.27	13.48	0.00
68 8250	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	10/19/2009	691.00	666.76	24.24	0.00
8.0100	783980204	SEI CORE FIXED INCOME FUND (SCOAX)	08/25/2008	12/22/2009	80.50	77.66	2.84	0.00
Total Long Term 15% Sales					3,331.86	3,255.40	76.46	0.00

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