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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning 04/01/09 **, and ending** 03/31/10

G Check all that apply: [ ] Initial return [ ] Initial return of a former public charity [ ] Final return [ ] Amended return [ ] Address change [ ] Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.

Name of foundation: The James & Alvina Bartos Balog Foundation, Inc.

Number and street (or P O box number if mail is not delivered to street address): %Curtis Ward, 3055 Cardinal Drive — Room/suite: 202

City or town, state, and ZIP code: Vero Beach FL 32963

A Employer identification number: 65-0829807

B Telephone number (see page 10 of the instructions): 772-234-8400

C If exemption application is pending, check here ▶ [ ]

D 1. Foreign organizations, check here ▶ [ ]

2 Foreign organizations meeting the 85% test, check here and attach computation ▶ [ ]

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

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ [ ]

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

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ $ 1,662,457

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)				
	2	Check ▶ [X] if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	5,100	5,100	5,100	
	4	Dividends and interest from securities	47,424	47,424	47,424	
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	4,883			
	b	Gross sales price for all assets on line 6a 61,750				
	7	Capital gain net income (from Part IV, line 2)		4,883		
	8	Net short-term capital gain			0	
	9	Income modifications				
	10a	Gross sales less returns & allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	57,407	57,407	52,524	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule) Stmt 1	3,915	1,566	1,566	2,349
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions) Stmt 2	3,806			
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (att sch) Stmt 3	7	7	7	
	24	**Total operating and administrative expenses.** Add lines 13 through 23	7,728	1,573	1,573	2,349
	25	Contributions, gifts, grants paid	92,650			92,650
	26	**Total expenses and disbursements.** Add lines 24 and 25	100,378	1,573	1,573	94,999
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-42,971			
	b	**Net investment income** (if negative, enter -0-)		55,834		
	c	**Adjusted net income** (if negative, enter -0-)			50,951	

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P 18

Part II Balance Sheets

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

			Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		8,618	8,618
	2	Savings and temporary cash investments	795,124	248,047	248,047
	3	Accounts receivable ▶			
		Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)			
	7	Other notes and loans receivable (att schedule) ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule) See Stmt 4	561,850	1,057,338	1,405,792
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach sch) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach sch) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	1,356,974	1,314,003	1,662,457
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	0	0	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶** [X] **and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted	1,356,974	1,314,003	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ [ ] **and complete lines 27 through 31.**			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see page 17 of the instructions)	1,356,974	1,314,003	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	1,356,974	1,314,003	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,356,974
2	Enter amount from Part I, line 27a	2	-42,971
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	1,314,003
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,314,003

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Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	Ishares Barclays 1-3yr CD-100shrs	P	02/04/09	02/19/10
b	Powershares ETF Fd-1000shrs	P	01/07/10	02/19/10
c	Spectra Energy Corp-1500shrs	P	Various	02/19/09
d	Verigy Ltd.-244shrs	P	09/12/02	02/19/09
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	10,407		10,126	281
b	16,669		17,026	-357
c	31,976		27,935	4,041
d	2,698		1,780	918
e				

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				281
b				-357
c				4,041
d				918
e				

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7 }	2	4,883
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	95,693	1,762,322	0.054299
2007	94,103	2,081,641	0.045206
2006	86,400	1,949,019	0.044330
2005	79,046	1,752,542	0.045104
2004	67,764	1,615,804	0.041938

2 **Total** of line 1, column (d)	2	0.230877
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.046175
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,604,367
5 Multiply line 4 by line 3	5	74,082
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	558
7 Add lines 5 and 6	7	74,640
8 Enter qualifying distributions from Part XII, line 4	8	94,999

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter (attach copy of letter if necessary—see instructions)				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☒ and enter 1% of Part I, line 27b			1	558
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			2	0
3	Add lines 1 and 2			3	558
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			4	0
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-			5	558
6	Credits/Payments				
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	2,000		
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c			
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments Add lines 6a through 6d			7	2,000
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached			8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	1,442
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ 1,442 **Refunded** ▶			11	

Part VII-A Statements Regarding Activities

				Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		1b		X
c	Did the foundation file **Form 1120-POL** for this year?		1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ______ **(2)** On foundation managers ▶ $ ______				
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______				
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?		4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV		7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ FL				
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	N/A	8b		
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV		9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		10		X

Part VII-A Statements Regarding Activities (continued)

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ Curtis,Ward & Assoc.,PA Telephone no ▶ 772-234-8400
3055 Cardinal Drive, Ste 202
Located at ▶ Vero Beach, FL ZIP+4 ▶ 32963

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

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

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

				Yes	No
1a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	N/A	1c		
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))				
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	☐ Yes ☒ No			
	If "Yes," list the years ▶ 20 , 20 , 20 , 20				
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see page 20 of the instructions)	N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20 , 20 , 20 , 20				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2009 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)	N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b		X

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

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

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? N/A **5b**

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

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

If "Yes," attach the statement required by Regulations section 53 4945-5(d)

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** No: X

If "Yes" to 6b, file Form 8870

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

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? N/A **7b**

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 5				

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

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

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

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over $50,000 for professional services ▶

Part IX-A Summary of Direct Charitable Activities

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

Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See page 24 of the instructions 3	
Total. Add lines 1 through 3 ▶	

Part X Minimum Investment Return (All domestic foundations must complete this part Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes			
a	Average monthly fair market value of securities		1a	1,231,793
b	Average of monthly cash balances		1b	397,006
c	Fair market value of all other assets (see page 24 of the instructions)		1c	0
d	**Total** (add lines 1a, b, and c)		1d	1,628,799
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0		
2	Acquisition indebtedness applicable to line 1 assets		2	0
3	Subtract line 2 from line 1d		3	1,628,799
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)		4	24,432
5	**Net value of noncharitable-use assets** Subtract line 4 from line 3 Enter here and on Part V, line 4		5	1,604,367
6	**Minimum investment return.** Enter 5% of line 5		6	80,218

Part XI Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part)

1	Minimum investment return from Part X, line 6		1	80,218
2a	Tax on investment income for 2009 from Part VI, line 5	2a 558		
b	Income tax for 2009 (This does not include the tax from Part VI)	2b		
c	Add lines 2a and 2b		2c	558
3	Distributable amount before adjustments Subtract line 2c from line 1		3	79,660
4	Recoveries of amounts treated as qualifying distributions		4	
5	Add lines 3 and 4		5	79,660
6	Deduction from distributable amount (see page 25 of the instructions)		6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1		7	79,660

Part XII Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	94,999
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	94,999
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	558
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	94,441

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

Part XIII Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				79,660
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			86,213	
b Total for prior years 20 ____ , 20 ____ , 20 ____				
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f **Total** of lines 3a through e				
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ $ 94,999				
a Applied to 2008, but not more than line 2a			86,213	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
d Applied to 2009 distributable amount				8,786
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions				
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				70,874
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)				
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

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

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year—see page 28 of the instructions.)

1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000) (See section 507(d)(2))

James Balog

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

N/A

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

Check here ▶ ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

N/A

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

N/A

c Any submission deadlines

N/A

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

N/A

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year See Attached Schedule				92,650
Total			▶ 3a	92,650
b Approved for future payment N/A				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	5,100	
4 Dividends and interest from securities			14	47,424	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	4,883	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0		57,407	0

13 **Total.** Add line 12, columns (b), (d), and (e) 13 57,407

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 29 of the instructions)
N/A	

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received

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

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

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

Ned P. Curtis | 8/10/10 | P.O.A. ATTACHED

Signature of officer or trustee | Date | Title

Paid Preparer's Use Only

Preparer's signature Ned P. Curtis	Date 05/04/10	Check if self-employed ☐	Preparer's identifying number (see **Signature** on page 30 of the instructions) P00123847
Firm's name (or yours if self-employed), address, and ZIP code	Curtis, Ward & Associates, P.A. 3055 Cardinal Drive, Suite 202 Vero Beach, FL 32963	EIN 59-2744719	Phone no 772-234-8400

The James & Alvina Bartos Balog Foundation
Form 990-PF
Part XV line 3 Schedule of Contributions
ID# 65-0829807
March 31, 2010

Contributions

Recipient	*Address*	*if recipient is an individual, show any relationship to any foundation manager or substantial contributor*	*Foundation Status of Recipient*	*Purpose of grant or contribution*	*Amount*
Boulder Museum of Contemporary Art	1750 Thirteenth Street Boulder, CO 80306	N/A	Public	unrestricted	250 00
Boys & Girls Club of Indian River County	PO Box 3068 Vero Beach, FL 32964	N/A	Public	unrestricted	300 00
Camp Chewonki	485 Chewonki Neck Road Wiscasset, Maine 04578	N/A	Public	unrestricted	1,000 00
Camp Dudley	126 Dudley Road Westport, NY 12993	N/A	Public	unrestricted	1,000 00
Cancer Schmancer Foundation	P O Box 2760 Reston, VA 20195	N/A	Public	unrestricted	1,000 00
Center for Civic Responsibility	450 Main St Metuchen, NJ 08840	N/A	Public	unrestricted	9,000 00
Children of Armenia	5300 West Atlantic Avenue Suite 700 Delray Beach, Florida 33484	N/A	Public	unrestricted	500 00
Colorado Outward Bound School	945 Pennsylvania Street Denver, CO 80203	N/A	Public	unrestricted	2,000 00
Colorado Public Radio	7409 South Alton Court Centennial, CO 80112	N/A	Public	unrestricted	500 00
Colorado Symphony	1000 14th Street, #15 Denver, CO 80202-2333	N/A	Public	unrestricted	250 00
Community Gatepath	875 Stanton Road Burlingame, CA 94010	N/A	Public	unrestricted	1,000 00
Community Servings	18 Marbury Terrace Boston, MA 02130	N/A	Public	unrestricted	1,000 00
Covenant House of New Jersey	330 Washington Street Newark, NJ 07102	N/A	Public	unrestricted	5,000 00
Engineers Without Borders	1811 Lefthand Circle, Ste A-1 Longmont, CO 80501	N/A	Public	unrestricted	2,000 00
Environmental Learning Center	255 Live Oak Drive Vero Beach, FL 32963	N/A	Public	unrestricted	200 00
F I R E	1020 North Taylor St Louis, Missouri 63113-2802	N/A	Public	unrestricted	50 00

The James & Alvina Bartos Balog Foundation
Form 990-PF
Part XV line 3 Schedule of Contributions
ID# 65-0829807
March 31, 2010

Contributions

Recipient	*Address*	*if recipient is an individual, show any relationship to any foundation manager or substantial contributor*	*Foundation Status of Recipient*	*Purpose of grant or contribution*	*Amount*
Foundation for Teaching Economics	260 Russell Blvd Suite B Davis, CA 95616	N/A	Public	unrestricted	300 00
Friends of Hawthorne	12700 Grevillea Ave Hawthorne, CA 95616	N/A	Public	unrestricted	500 00
Gifford Youth Center	4875 43rd Ave Vero Beach, FL 32967	N/A	Public	unrestricted	500 00
Green Belt Movement Int	39 North Broadway White Plains, NY 10601	N/A	Public	unrestricted	2,000 00
Habitat fo Humanity of IRC	4568 N U S Hwy 1 Vero Beach, FL 32967	N/A	Public	unrestricted	200 00
Harding Land Trust	P O Box 576 New Vernon, NJ 07976	N/A	Public	unrestricted	250 00
Harding Township	21 Blue Mill Road, Box 666 New Vernon, NJ 07976	N/A	Public	unrestricted	3,500 00
Hibiscus Children's Center	2400 N E Dixie Highway Jensen Beach, FL 34957	N/A	Public	unrestricted	250 00
Holy Cross Catholic Church	500 Iris Lane Vero Beach, FL 32963	N/A	Public	unrestricted	500 00
International Center of Photography	1114 Ave of the Americas New York, NY 10036	N/A	Public	unrestricted	2,000 00
Jarrow Montessori School	3900 Orange Court Boulder, Colorado 80304	N/A	Public	unrestricted	750 00
Joan Osvath Tuition Angel Project	1783 E Main St Ventura, CA 93001	N/A	Public	unrestricted	300 00
KUVO Radio	2900 Welton St , #200 Denver, CO 80205	N/A	Public	unrestricted	500 00
KGNU Radio	PO Box 885 Boulder, CO 80306	N/A	Public	unrestricted	500 00
Marine Semper Fi Fund	825 College Blvd, Suite 102, PMB 609 Oceanside, CA 92057	N/A	Public	unrestricted	2,500 00
Mercy Center	1106 Main St Asbury Park, NJ 07712	N/A	Public	unrestricted	250 00

The James & Alvina Bartos Balog Foundation
Form 990-PF
Part XV line 3 Schedule of Contributions
ID# 65-0829807
March 31, 2010

Contributions

Recipient	*Address*	*if recipient is an individual, show any relationship to any foundation manager or substantial contributor*	*Foundation Status of Recipient*	*Purpose of grant or contribution*	*Amount*
Middle East Forum	1500 Walnut Street, Suite 1050 Philadelphia, PA 19102	N/A	Public	unrestricted	250 00
Museum of Fine Arts, Houston	PO Box 6826 Houston, TX 77005	N/A	Public	unrestricted	2,000 00
New Beginnings Family Academy	184 Garden Street Bridgeport, CT 06605	N/A	Public	unrestricted	1,000 00
Ovarian Cancer Research Fund	14 Pennsylvania Plaza, Suite 1400 New York, NY 10122	N/A	Public	unrestricted	1,000 00
Our Lady of Lourdes High School	100 W 14th Ave Parkway Coal Township, PA 17866	N/A	Public	unrestricted	2,500 00
National Multiple Sclerosis Society	PO Box 4527 New York, NY 10163	N/A	Public	unrestricted	500 00
Pennsylvania State University	309 Old Main Park, PA 16802	N/A	Public	unrestricted	12,500.00
Robin Hood Foundation	826 Broadway, 9th Floor New York, NY 10003	N/A	Public	unrestricted	2,500 00
Rutgers University Foundation	7 College Ave New Brunswick, NJ 08901	N/A	Public	unrestricted	3,000 00
Big Fun	PO Box 15649 Sacramento, CA 95852	N/A	Public	unrestricted	2,000 00
Sabre Foundation	872 Massachusetts Ave, Ste 2-1 Cambridge, MA 02139	N/A	Public	unrestricted	200 00
Scholarship Fund for Inner City Children	PO Box 9500 Newark, NJ 07104	N/A	Public	unrestricted	500 00
Sierra House Inc	11 South Maple Avenue East Orange, NJ 07018	N/A	Public	unrestricted	1,000 00
St Peter & Paul Catholic Church	PO Box 204 Vintondale, PA 15961	N/A	Public	unrestricted	5,000 00
The Wild Foundation	717 Poplar Avenue Boulder, CO 80304 USA	N/A	Public	unrestricted	15,000 00
There with Care	4949 N Broadway Street, Suite 124 Boulder, Colorado 80304	N/A	Public	unrestricted	1,000 00
Tree Musketeers	136 Main Street	N/A	Public	unrestricted	1,000 00

The James & Alvina Bartos Balog Foundation
Form 990-PF
Part XV line 3 Schedule of Contributions
ID# 65-0829807
March 31, 2010

Contributions

Recipient	Address	if recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation Status of Recipient	Purpose of grant or contribution	Amount
	El Segundo, CA 90245				
United Way of IRC	1836 14th Avenue Vero Beach, FL	N/A	Public	unrestricted	500 00
Vero Beach Opera	PO Box 6912 Vero Beach, FL 32961	N/A	Public	unrestricted	200 00
VNA Hospice	1111 36th St Vero Beach, FL 32960	N/A	Public	unrestricted	1,000 00
WXEL	P O Box 6607 West Palm Beach, FL 33405 Ft Pierce, FL 34981	N/A	Public	unrestricted	150 00
					92,650 00

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Curtis, Ward & Associates, P.A.	$ 3,915	$ 1,566	$ 1,566	$ 2,349
Total	$ 3,915	$ 1,566	$ 1,566	$ 2,349

Statement 2 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Foreign Tax Withheld	$ 2,500	$	$	$
Florida Filing Fee	61			
Federal Excise Tax	1,245			
Total	$ 3,806	$ 0	$ 0	$ 0

Statement 3 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
	$	$	$	$
Expenses				
Investment Fees	7	7	7	
Total	$ 7	$ 7	$ 7	$ 0

Federal Statements

Statement 4 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
See Attached Schedule	$ 561,850	$ 1,057,338	Cost	$ 1,405,792
Total	$ 561,850	$ 1,057,338		$ 1,405,792

The James and Alvina Bartos Balog Foundation Inc.
EIN: 65-0829807
Attachment to Balance Sheet
March 31, 2010

Investment	Beginning of the Year @ Cost	End of the Year @ Cost	Cost or Market	Fair Market Value
ADP, Inc	-	19,950.25	COST	22,235 00
Berkshire Hathaway Inc	59,765 00	59,765 00	COST	60,952 50
Bristol Myers Squibb	-	22,684 50	COST	26,700 00
Dow Chemical Corp. Bond 4 850%	-	101,811 74	COST	105,752 00
Enbridge Income Fd	47,145 00	47,145.00	COST	50,392 00
Enbridge Income Fd	-	39,973 44	COST	50,392 00
Enbridge Inc	36,775 00	36,775 00	COST	95,500 00
Enbridge Inc	28,742 00	28,742.00	COST	47,750 00
FPL Group	29,738 75	29,738 75	COST	32,622.75
FPL Group	-	50,230 00	COST	48,330 00
Honeywell Intl	-	18,500.25	COST	22,635 00
Ishares Barclays 1-3yr CD BD Fd	101,261 00	91,134.90	COST	94,131 00
Ishares Barclays 1-3yr CD BD Fd	-	51,080.20	COST	52,295 00
Ishares Barclays TIPS	-	50,711 20	COST	51,950 00
Ishares IBoxx Investop	-	48,628 60	COST	52,885 00
Ishares IBoxx Investop	-	50,286 00	COST	52,885 00
Johnson and Johnson	40,990 00	40,990 00	COST	65,200 00
Johnson and Johnson	26,117.00	26,117 00	COST	65,200.00
McDonalds Corp	-	28,600.25	COST	33,360.00
Nestle S A Sponsored ADR	17,460 95	17,460 95	COST	166,400 00
Northern European Oil Royalty	60,981.00	60,981 00	COST	57,700 00
Powershares ETF Fd	-	-	COST	
Proctor & Gamble	58,755 00	58,755 00	COST	63,270 00
Royal Dutch Petroleum	24,405 00	24,405 00	COST	28,930 00
Spectra Energy Corp (spin off frm Duke)	7,542 29	-	COST	
Spectra Energy Corp (spin off frm Duke)	8,074 30	-	COST	
Spectra Energy Corp (spin off frm Duke)	12,317 75	-	COST	
Statoilhydro ASA	-	52,871 50	COST	58,325 00
Verigy Ltd (spin off frm Agilent)	1,779 95	-	COST	
	561,849.99	1,057,337 53		1,405,792 25

Federal Statements

Statement 5 - Form 990-PF, Part VIII, Line 1 - List of Officers, Directors, Trustees, Etc.

Name and Address	Title	Average Hours	Compensation	Benefits	Expenses
James Balog 2205 N. Southwinds #307 Vero Beach FL 32963	Director	5.00	0	0	0
Alvina B. Balog 2205 N. Southwinds #307 Vero Beach FL 32963	Director	5.00	0	0	0
James D. Balog 2205 N. Southwinds #307 Vero Beach FL 32963	Director	2.00	0	0	0
Stephen J. Balog 2205 N. Southwinds #307 Vero Beach FL 32963	Director	2.00	0	0	0
Michael G. Balog 2205 N. Southwinds #307 Vero Beach FL 32963	Director	2.00	0	0	0

Federal Statements

Form 990-PF, Part XV, Line 1a - Managers Who Contributed Over 2% or $5,000

Name of Manager	Amount
James Balog	$
Total	$ 0

Form 2848 (Rev June 2008) Department of the Treasury Internal Revenue Service

Power of Attorney and Declaration of Representative

▶ Type or print. ▶ See the separate instructions.

OMB No 1545-0150

For IRS Use Only
Received by
Name
Telephone
Function
Date / /

Part I Power of Attorney

Caution: Form 2848 will not be honored for any purpose other than representation before the IRS.

1 Taxpayer information. Taxpayer(s) must sign and date this form on page 2, line 9.

Taxpayer name(s) and address	Social security number(s)	Employer identification number
The James & Alvina Bartos Balog Foundation, Inc. %Curtis Ward, 3055 Cardinal Drive 202 Vero Beach FL 32963		65-0829807
	Daytime telephone number 772-234-8400	Plan number (if applicable)

hereby appoint(s) the following representative(s) as attorney(s)-in-fact:

2 Representative(s) must sign and date this form on page 2, Part II.

Name and address	
Ned P. Curtis, C.P.A. 3055 Cardinal Drive Suite 202 Vero Beach FL 32963	CAF No. 6505-19564R Telephone No. 772-234-8400 Fax No. 772-234-8404 Check if new: Address ☐ Telephone No ☐ Fax No. ☐
Todd E. Miller, C.P.A. 3055 Cardinal Drive Suite 202 Vero Beach FL 32963	CAF No. 2606-10094R Telephone No 772-234-8400 Fax No 772-234-8404 Check if new: Address ☐ Telephone No ☐ Fax No. ☐
	CAF No. Telephone No. Fax No. Check if new: Address ☐ Telephone No. ☐ Fax No. ☐

to represent the taxpayer(s) before the Internal Revenue Service for the following tax matters:

3 Tax matters

Type of Tax (Income, Employment, Excise, etc.) or Civil Penalty (see the instructions for line 3)	Tax Form Number (1040, 941, 720, etc.)	Year(s) or Period(s) (see the instructions for line 3)
Income-Franchise	990-PF	2009 thru 2012

4 Specific use not recorded on Centralized Authorization File (CAF). If the power of attorney is for a specific use not recorded on CAF, check this box. See the instructions for **Line 4. Specific Uses Not Recorded on CAF** ▶ ☐

5 Acts authorized. The representatives are authorized to receive and inspect confidential tax information and to perform any and all acts that I (we) can perform with respect to the tax matters described on line 3, for example, the authority to sign any agreements, consents, or other documents. The authority does not include the power to receive refund checks (see line 6 below), the power to substitute another representative or add additional representatives, the power to sign certain returns, or the power to execute a request for disclosure of tax returns or return information to a third party. See the line 5 instructions for more information

Exceptions. An unenrolled return preparer cannot sign any document for a taxpayer and may only represent taxpayers in limited situations See **Unenrolled Return Preparer** on page 1 of the instructions. An enrolled actuary may only represent taxpayers to the extent provided in section 10.3(d) of Treasury Department Circular No. 230 (Circular 230). An enrolled retirement plan administrator may only represent taxpayers to the extent provided in section 10.3(e) of Circular 230. See the line 5 instructions for restrictions on tax matters partners. In most cases, the student practitioner's (levels k and l) authority is limited (for example, they may only practice under the supervision of another practitioner).

List any specific additions or deletions to the acts otherwise authorized in this power of attorney:
Powers granted include the power to sign the return pursuant to Regulatio Section 1.6012-1(a)(5) by reason of continuous absence from the United States.

6 Receipt of refund checks. If you want to authorize a representative named on line 2 to receive, **BUT NOT TO ENDORSE OR CASH,** refund checks, initial here ________ and list the name of that representative below.

Name of representative to receive refund check(s) ▶

Form 2848 (Rev. 6-2008) The James & Alvina Bartos Balog 65-0829807 Page 2

7 **Notices and communications.** Original notices and other written communications will be sent to you and a copy to the first representative listed on line 2.

a If you also want the second representative listed to receive a copy of notices and communications, check this box ▶ ☐

b If you do not want any notices or communications sent to your representative(s), check this box ▶ ☐

8 **Retention/revocation of prior power(s) of attorney.** The filing of this power of attorney automatically revokes all earlier power(s) of attorney on file with the Internal Revenue Service for the same tax matters and years or periods covered by this document. If you **do not** want to revoke a prior power of attorney, check here ▶ ☐

YOU MUST ATTACH A COPY OF ANY POWER OF ATTORNEY YOU WANT TO REMAIN IN EFFECT.

9 **Signature of taxpayer(s).** If a tax matter concerns a joint return, both husband and wife must sign if joint representation is requested, otherwise, see the instructions. If signed by a corporate officer, partner, guardian, tax matters partner, executor, receiver, administrator, or trustee on behalf of the taxpayer, I certify that I have the authority to execute this form on behalf of the taxpayer.

▶ **IF NOT SIGNED AND DATED, THIS POWER OF ATTORNEY WILL BE RETURNED.**

James Balog — 7/29/09 — Pres

Signature — Date — Title (if applicable)

James Balog — ☐☐☐☐☐ — The James & Alvina Bartos Balog

Print Name — PIN Number — Print name of taxpayer from line 1 if other than individual

Alvina Bartos Balog — V-P & Secy. Treas

Signature — Date — Title (if applicable)

Alvina Bartos Balog — ☐☐☐☐☐

Print Name — PIN Number

Part II Declaration of Representative

Caution: Students with a special order to represent taxpayers in qualified Low Income Taxpayer Clinics or the Student Tax Clinic Program (levels k and l), see the instructions for Part II.

Under penalties of perjury, I declare that:

- I am not currently under suspension or disbarment from practice before the Internal Revenue Service;
- I am aware of regulations contained in Circular 230 (31 CFR, Part 10), as amended, concerning the practice of attorneys, certified public accountants, enrolled agents, enrolled actuaries, and others;
- I am authorized to represent the taxpayer(s) identified in Part I for the tax matter(s) specified there; and
- I am one of the following:

a Attorney—a member in good standing of the bar of the highest court of the jurisdiction shown below.

b Certified Public Accountant—duly qualified to practice as a certified public accountant in the jurisdiction shown below.

c Enrolled Agent—enrolled as an agent under the requirements of Circular 230

d Officer—a bona fide officer of the taxpayer's organization.

e Full-Time Employee—a full-time employee of the taxpayer.

f Family Member—a member of the taxpayer's immediate family (for example, spouse, parent, child, brother, or sister).

g Enrolled Actuary—enrolled as an actuary by the Joint Board for the Enrollment of Actuaries under 29 U.S.C. 1242 (the authority to practice before the Internal Revenue Service is limited by section 10.3(d) of Circular 230).

h Unenrolled Return Preparer—the authority to practice before the Internal Revenue Service is limited by Circular 230, section 10.7(c)(1)(viii). You must have prepared the return in question and the return must be under examination by the IRS. See **Unenrolled Return Preparer** on page 1 of the instructions

k Student Attorney—student who receives permission to practice before the IRS by virtue of their status as a law student under section 10 7(d) of Circular 230.

l Student CPA—student who receives permission to practice before the IRS by virtue of their status as a CPA student under section 10.7(d) of Circular 230.

r Enrolled Retirement Plan Agent—enrolled as a retirement plan agent under the requirements of Circular 230 (the authority to practice before the Internal Revenue Service is limited by section 10.3(e)).

▶ **IF THIS DECLARATION OF REPRESENTATIVE IS NOT SIGNED AND DATED, THE POWER OF ATTORNEY WILL BE RETURNED.** See the Part II instructions.

Designation—Insert above letter (a-r)	Jurisdiction (state) or identification	Signature	Date
b	Florida	Neil P Curtis	7/29/09
b	Florida	John C Mill	7/29/09