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 , 2009, and ending 03-31 , 20 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 Helene Wurlitzer Foundation of New M

Number and street (or P O box number if mail is not delivered to street address): PO Box 1891

Room/suite:

City or town, state, and ZIP code: Taos, NM 87571

A Employer identification number: 85-0128634

B Telephone number (see page 10 of the instructions): (575) 758-2413

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

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

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

H Check type of organization ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ $ 4,250,444

J Accounting method ☐ Cash ☒ Accrual
☐ Other (specify)
(Part I, column (d) must be on cash basis)

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

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
	Revenue				
1	Contributions, gifts, grants, etc , received (attach schedule)	18,875			
2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	65,844	65,844	65,844	
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	348,493			
b	Gross sales price for all assets on line 6a				
7	Capital gain net income (from Part IV, line 2)		348,493		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule) STM106	3,381			
12	**Total.** Add lines 1 through 11	436,593	414,337	65,844	
	Operating and Administrative Expenses				
13	Compensation of officers, directors, trustees, etc	59,224		11,845	47,379
14	Other employee salaries and wages	44,387		2,219	42,168
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule)				
c	Other professional fees (attach schedule)				
17	Interest				
18	Taxes (attach schedule) (see page 14 of the instructions) STM110	9,202		1,380	7,822
19	Depreciation (attach schedule) and depletion STM126	36,236			
20	Occupancy	30,634			30,634
21	Travel, conferences, and meetings	5,628			5,628
22	Printing and publications				
23	Other expenses (attach schedule) STM103	58,298		1,440	56,858
24	**Total operating and administrative expenses.** Add lines 13 through 23	243,609	0	16,884	190,489
25	Contributions, gifts, grants paid	250			0
26	**Total expenses and disbursements.** Add lines 24 and 25	243,859	0	16,884	190,489
27	Subtract line 26 from line 12				
a	**Excess of revenue over expenses and disbursements**	192,734			
b	**Net investment income** (if negative, enter -0-)		414,337		
c	**Adjusted net income** (if negative, enter -0-)			48,960	

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23

Part II Balance Sheets

		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing	32,342	36,372	36,372
	2	Savings and temporary cash investments	140,309		
	3	Accounts receivable ▶ 442			
		Less allowance for doubtful accounts ▶		442	442
	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 (attach schedule) ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments - U S and state government obligations (attach schedule)			
	b	Investments - corporate stock (attach schedule) STM137	971,086	1,337,430	1,337,430
	c	Investments - corporate bonds (attach schedule)			
	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	12	Investments - mortgage loans			
	13	Investments - other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ 1,135,866			
		Less accumulated depreciation (attach schedule) STM119 ▶ 722,506	450,133	413,360	1,575,500
	15	Other assets (describe ▶ STM120)	145,143	145,143	1,300,700
	16	**Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	1,739,013	1,932,747	4,250,444
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 ▶ STM121)	2,796	3,796	
	23	**Total liabilities** (add lines 17 through 22)	2,796	3,796	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted	1,736,217	1,928,951	
	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)	1,736,217	1,928,951	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	1,739,013	1,932,747	

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	1,736,217
2	Enter amount from Part I, line 27a	2	192,734
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	1,928,951
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	1,928,951

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 (yr , mo , day)	(d) Date sold (yr , mo , day)
1a	US Corporate shares	P	VARIOUS	VARIOUS
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	922,453		573,960	348,493
b				
c				
d				
e				

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				348,493
b				
c				
d				
e				

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 } **2** 348,493

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			
2007			
2006			
2005			
2004			

2	**Total** of line 1, column (d)	2	
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	
5	Multiply line 4 by line 3	5	0
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	
7	Add lines 5 and 6	7	0
8	Enter qualifying distributions from Part XII, line 4	8	

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

Part 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: 1972-07-17 (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	N/A
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	
3	Add lines 1 and 2	3	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	0
6	Credits/Payments:		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 6a		
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	
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	
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ **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)?	1b		X
	If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c	Did the foundation file **Form 1120-POL** for this year?	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?	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) ▶ NM			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV 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)

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 ▶ wurlitzerfoundation .org

14 The books are in care of ▶ Michael Knight Telephone no ▶ 575-758-2413

Located at ▶ PO Box 1891 Taos, NM ZIP+4 ▶ 87571

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)?	1b		X
	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?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? ☐ Yes ☒ No If "Yes," list the years ▶ ____, ____, ____, ____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see page 20 of the instructions)	2b		X
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ ____, ____, ____, ____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2009 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)	3b		
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)? **5b** Yes: ☐ No: X

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? ☐ 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** Yes: 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? **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 See 990_OFOV	(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
Michael Knight PO Box 1891 Taos, NM 87571	Executive Direc 40	59,224	0	0
Joseph Caldwell PO Box 1891 Taos, NM 87571	Director 0	0	0	0
William Ebie PO Box 1891 Taos, NM 87571	Treasurer 0	0	0	0
Harold Hahn PO Box 1891 Taos, NM 87571	Secretary 0	0	0	0

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

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

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

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

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

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 The foundation maintains 11 residency units for which 32 artists received grants during the fiscal year.	51,306
2 The foundation maintains a permanent collection of art, which is open for public viewing.	2,642
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	0
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	1,254,021
b	Average of monthly cash balances	1b	39,093
c	Fair market value of all other assets (see page 24 of the instructions)	1c	2,868,200
d	**Total** (add lines 1a, b, and c)	1d	4,161,314
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	4,161,314
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	62,420
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	4,098,894
6	**Minimum investment return.** Enter 5% of line 5	6	204,945

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

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	190,489
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	190,489
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	190,489

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

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

		(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1	Distributable amount for 2009 from Part XI, line 7				
2	Undistributed income, if any, as of the end of 2009				
a	Enter amount for 2008 only				
b	Total for prior years ______ , ______ , ______				
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 ▶ $ 190,489				
a	Applied to 2008, but not more than line 2a				
b	Applied to undistributed income of prior years (Election required - see page 26 of the instructions)				
c	Treated as distributions out of corpus (Election required - see page 26 of the instructions)				
d	Applied to 2009 distributable amount				
e	Remaining amount distributed out of corpus	190,489			
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	190,489			
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				
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	190,489			
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 190,489				

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 ▶ 1972-07-17

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			
		(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	48,960	56,463	213,888	52,199	371,510
b	85% of line 2a	41,616	47,994	181,805	44,369	315,784
c	Qualifying distributions from Part XII, line 4 for each year listed	190,489	181,006	172,743	165,075	709,313
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	190,489	181,006	172,743	165,075	709,313
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	136,493	146,246	142,592	122,211	547,542
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))

NONE,

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

NONE,

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

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc (see 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

990APP

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

c Any submission deadlines

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

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 list			artist grant	51,306
Total . . . . ▶ 3a				51,306
b Approved for future payment				
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					
4 Dividends and interest from securities			14	65,844	
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			18	348,493	
8 Gain or (loss) from sales of assets other than inventory			18	1,817	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue. a Cleaning fees			03	1,000	
b Investment lawsuit			18	564	
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				417,718	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 417,718

(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)

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

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

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

Signature of officer or trustee

Date: 2/14/2011

Title: Executive Director

Paid Preparer's Use Only

Preparer's signature: Andrew Respess

Date: 2/14/2011

Check if self-employed ☐

Preparer's identifying number (see Signature on page 30 of the instructions)

Firm's name (or yours if self-employed), address, and ZIP code:
Respess and Respess PC
El Prado, NM 87529

EIN

Phone no 575-776-9858

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, 990-EZ, and 990-PF.**

OMB No 1545-0047

2009

Name of the organization	**Employer identification number**
The Helene Wurlitzer Foundation of New Mexico	85-0128634

Organization type (check one).

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor Complete Parts I and II

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or Form 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than $1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc , purposes, but these contributions did not aggregate to more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc , contributions of $5,000 or more during the year . . . . ▶ $ ____________

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Schedule B (Form 990, 990-EZ, or 990-PF) (2009) Page 1 of 1 of Part I

Name of organization	Employer identification number
The Helene Wurlitzer Foundation of New Mexico	85-0128634

Part I **Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Harald Hahn PO Box 1891 Taos, NM 87571	$ 10,050	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Form 990_OfOv (2009) The Helene Wurlitzer Foundation of New Mexico 85-0128634

Current Officers, Directors, Trustees, and Key Employees

1 List all officers, directors, trustees, and key employees for the year even if they were not compensated.

(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 deferred compensation	(e) Expense account, other allowances
Tito Naranjo	Director			
PO Box 1891 Taos, NM 87571	0	0	0	0
Rena Rosenqist	President			
PO Box 1891 Taos, NM 87571	0	0	0	0
Peggy Nelson	Vice President			
PO Box 1891 Taos, NM 87571	0	0	0	0
Mary Alexander				
PO Box 1891 Taos, NM 87571	0	0	0	0

Federal Supporting Statements

2009 PG 01

Name(s) as shown on return	FEIN
The Helene Wurlitzer Foundation of New Mexico	85-0128634

Statement #120

Form 990PF, Part II, Line 15
Other Assets Schedule

Description	BOY Book	EOY Book	FMV
Artwork and collections	144,443	144,443	1,300,000
Utility deposits	700	700	700
Total	145,143	145,143	1,300,700

PG 01
Statement #121

Form 990PF, Part II, Line 22
Other Liabilities Schedule

Description	BOY Amount	EOY Amount
Damage deposits	2,796	3,796
Total	2,796	3,796

PG 01
Statement #137

Form 990PF, Part II, Line 10(b)
Investments: Corporate Stock Schedule

Category	BOY	Book Value	EOY FMV
US Stocks	971,086	1,337,430	1,337,430
Totals	971,086	1,337,430	1,337,430

Federal Supporting Statements

2009 PG 01

Name(s) as shown on return

The Helene Wurlitzer Foundation of New Mexico

Your Social Security Number

85-0128634

Form 990PF, Part I, Line 23 - Other Expenses Schedule

Statement #103

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
Auto expense	3,266	0	0	3,266
Contract services	16,992	0	1,440	15,552
Insurance	17,873	0	0	17,873
Library	10,070	0	0	10,070
Miscellaneous	397	0	0	397
Office	3,558	0	0	3,558
Scholarships	1,000	0	0	1,000
Supplies	5,142	0	0	5,142
Totals	58,298	0	1,440	56,858

PG 01

Form 990PF, Part I, Line 11 - Other Income Schedule

Statement #106

Description	Revenue and expenses	Net investment	Adjusted net income
Sale of alfalfa	1,317	0	0
Lawsuit proceeds	564	0	0
Cleaning fees	1,000	0	0
Sale of painting	500	0	0
Totals	3,381	0	0

Federal Supporting Statements

2009 PG 01

Name(s) as shown on return

The Helene Wurlitzer Foundation of New Mexico

Your Social Security Number

85-0128634

Form 990PF, Part I, Line 18 - Taxes Schedule

Statement #110

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
Payroll taxes	9,202	0	1,380	7,822
Totals	9,202	0	1,380	7,822

PG01

Form 990PF, Part II, Line 14 - Land Etc. Schedule

Statement #119

Description	Cost or other basis	Accumulated depreciation	End of year book value	FMV
Furniture, fixtures and equipment	115,060	110,541	4,519	15,000
Vehicles	32,365	32,365		2,500
Buildings	186,460	186,460		200,000
Building improvements	741,885	392,824	349,061	600,000
Land	52,096		52,096	750,000
Land improvements	8,000	316	7,684	8,000
Total	1,135,866	722,506	413,360	1,575,500

Federal Supporting Statements

2009 PG 01

Name(s) as shown on return

The Helene Wurlitzer Foundation of New Mexico

Your Social Security Number

85-0128634

Form 990PF, Part I, Line 19 - Depreciation Schedule

Statement #126

Description	Date Acquired	Cost or Other basis	Prior year Depreciation	Computation Method	Rate	Life	Current Year Depreciation	Net Investment Income	Adjusted Net Income
See attached							36,236		
Totals							36,236		

STM~ LD

Federal Supporting Statements **2009** PG 01

Name(s) as shown on return: The Helene Wurlitzer Foundation of New Mexico

Your Social Security Number: 85-0128634

Form 990PF, Part XV, Line 2
Application Submission Information

990APP

Grant Program
Artist in residence

Applicant Name
Michael Knight

Address
PO Box 1891 Taos NM 87571

Telephone
575-758-2413

Form & Content
Completion of standard application indicating artistic area, date of requested grant, description of proposed project at the foundation, and submission of sample work.

Submission Deadline
January 18

Restrictions on Award
Limited on time period of residency.

The Helene Wurlitzer Foundation of New Mexico
Grant-in-Aid Report for Fiscal Year 2009
Year Ending March 31, 2010

Grantee	City and State	House	Period	Rent	Utilities	Total
Dottie Moore	Rock Hill, SC	#1	4/21 - 6/30	$1,375	$290	$1,665
Elizabeth Burger	CANCELLED	#1	7/8 - 10/1			$0
Susan Gladstone	Portland, OR	#1	7/27 - 9/18	$1,031	$219	$1,250
Rebecca Layton	Brooklyn, NY	#1	10/20 - 12/15	$1,100	$264	$1,364
Pamela Dodds	Toronto, Canada	#1	1/19 - 4/20/10	$1,375	$287	$1,662
Paul Rudy	Kansas City, MO	#2	4/21 - 6/30	$1,375	$216	$1,591
Debra Kaye	New York, NY	#2	7/21 - 10/1	$1,375	$273	$1,648
		#2	10/20 - 12/15			$0
Lera Auberbach	New York, NY	#2	2/4 - 3/3/10	$550	$122	$672
Anjana Appachana	Tempe, AZ	#3	4/1 - 5/5	$688	$133	$821
Lavonne Adams	Wilmington, NC	#3	5/11 - 6/18	$894	$173	$1,067
Roger Aplon	San Diego, CA	#3	7/21 - 9/29	$1,375	$286	$1,661
Devraux Baker	Mendolino, CA	#3	10/20 - 12/5	$894	$199	$1,093
		#3	1/19 - 4/20/10			$0
Nancy Cohen	New York, NY	#4	4/1 - 6/6	$1,306	$290	$1,596
Liza Porter	Tuscon, AZ	#4	7/22 - 9/30	$1,375	$282	$1,657
Dictyanna Hood	CANCELLED	#4	10/21 - 12/16			$0
Heather King	Los Angeles, CA	#4	1/20 - 4/21/10	$1,375	$295	$1,670
Ceila Reisman	Merion, PA	#5	4/22 - 6/25	$1,544	$308	$1,852
Kate Atkin	London, England	#5	7/22 - 10/15	$1,950	$429	$2,379
Sara Hanlon	Columbus, IN	#5	10/21 - 12/16	$1,300	$322	$1,622
Hee Sook Kim	Ardmore, PA	#5	1/20 - 3/5/10	$975	$194	$1,169
Hazel Walker	Glascow, Scotland	#6	4/22 - 7/6	$1,513	$284	$1,797
Jeanette Koumjiam	Brooklyn, NY	#6	7/22 - 9/30	$1,375	$282	$1,657
Su Geringer	Cedar Point, NC	#6	10/9 - 12/16	$1,306	$258	$1,564
renovating		#6	1/20 - 4/21/10			$0
Anita Sullivan	Eugene OR	#8	4/22 - 6/18	$1,169	$185	$1,354
Patricia Wakida	Oakland, CA	#8	7/22 - 9/30	$1,375	$253	$1,628
Cynthia Hogue	Phoenix, AZ	#8	11/4 - 12/4	$550	$108	$658
Carolyn Gage	Portland, ME	#8	1/19 - 4/22/10	$1,375	$267	$1,642
Jonathan Blum	South Pasedena, CA	#9N	4/23 - 7/2	$1,375	$211	$1,586
Shelley Armitage	El Paso, TX	#9N	7/23 - 10/1	$1,375	$274	$1,649
Glenn Aparicio Parry	Albuquerque, NM	#9N	10/22 -12/17	$1,100	$276	$1,376
Felicity Stone	CANCELLED	#9N	1/20 - 4/21/10			$0
(construction ongoing during this session)		#9S	4/23 - 7/2			
Cristina deGennaro	CANCELLED	#9S	7/23 - 10/1			$0
		#9S	10/22 - 12/17			$0
Marie Baille	Nice, France	#9S	1/21 - 4/22/10	$1,625	$278	$1,903
Jessica Pallington	New York, NY	#10N	4/23 - 6/30	$1,375	$188	$1,563
Elliot Sloan	CANCELLED	#10N	7/23 - 10/1			$0
		#10N	10/20 - 12/15			$0
George Ruentiz	San Ysidro, CA	#10N	1/21 - 4/22/10	$1,375	$286	$1,661
Pit Pinegar	Plainville, CT	#10S	4/23 - 6/29	$1,306	$204	$1,510
Christina Rosenberger	CANCELLED	#10S	7/23 - 10/1			$0
Ellen Kelley	Santa Barbara, CA	#10S	7/23 - 10/1	$1,375	$273	$1,648
		#10S	10/22 - 12/17			$0
Elizabeth Orndorff	Danville, KY	#10S	1/21 - 4/22/10	$1,375	$296	$1,671
FY 2009 TOTALS				**$41,426**	**$8,209**	**$51,306**

ASSET DEPRECIATION SHORT REPORT

THE HELENE WURLITZER FOUNDATION ***Mar. 31, 2010***

Sorted: ASSET A/C#
Method 1-FEDERAL-Std Conv Applied

Range 1200 - 1250
Include. All assets

Date Acq	Description	Meth/Life	Cost	Section 179	Depr Basis	Includes Section 179 Beg A/Depr	Curr Depr	End A/Depr
ASSET A/C#: 1200 - FURN, FIXTURES AND EQUIP								
01/01/90	Prior assets	SL/ 5.00	50,574.24	0.00	50,574.24	50,574.24	0.00	50,574.24
05/17/95	Alarm system	SL/10.00	313.50	0.00	313.50	313.50	0.00	313.50
08/04/95	Refrigerator	SL/10.00	524.99	0.00	524.99	524.99	0.00	524.99
12/28/95	Copier	SL/10.00	5,595.00	0.00	5,595.00	5,595.00	0.00	5,595.00
02/20/96	Washer and dryer	SL/10.00	1,195.93	0.00	1,195.93	1,195.93	0.00	1,195.93
02/22/96	Microwave	SL/10.00	988.68	0.00	988.68	988.68	0.00	988.68
02/23/96	4 Gas ranges	SL/10.00	1,368.00	0.00	1,368.00	1,368.00	0.00	1,368.00
03/01/96	Snowblower	SL/10.00	449.99	0.00	449.99	449.99	0.00	449.99
03/31/96	Office equipment	SL/10.00	6,810.73	0.00	6,810.73	6,810.73	0.00	6,810.73
04/11/96	Beds	SL/ 5.00	911.51	0.00	911.51	911.51	0.00	911.51
04/13/96	Chairs	SL/ 5.00	1,303.00	0.00	1,303.00	1,303.00	0.00	1,303.00
04/29/96	Cushions	SL/ 5.00	349.29	0.00	349.29	349.29	0.00	349.29
02/06/97	Refrigerator	SL/10.00	939.99	0.00	939.99	939.99	0.00	939.99
04/14/97	Refrigerator	SL/ 7.00	549.00	0.00	549.00	549.00	0.00	549.00
05/09/97	Mower	SL/ 5.00	900.51	0.00	900.51	900.51	0.00	900.51
05/29/97	Library steps	SL/ 7.00	303.95	0.00	303.95	303.95	0.00	303.95
06/05/97	Mulcher	SL/ 5.00	379.00	0.00	379.00	379.00	0.00	379.00
06/20/97	Tractor	SL/ 5.00	3,029.95	0.00	3,029.95	3,029.95	0.00	3,029.95
06/25/97	Table saw	SL/ 5.00	874.99	0.00	874.99	874.99	0.00	874.99
06/25/97	Tools and chest	SL/ 5.00	1,099.97	0.00	1,099.97	1,099.97	0.00	1,099.97
07/29/97	Riccar 8725 vacuum	SL/ 5.00	325.00	0.00	325.00	325.00	0.00	325.00
07/30/97	Keyboard	SL/ 5.00	349.99	0.00	349.99	349.99	0.00	349.99
08/01/97	Refrigerator	SL/ 7.00	499.00	0.00	499.00	499.00	0.00	499.00
08/08/97	Range	SL/ 7.00	409.00	0.00	409.00	409.00	0.00	409.00
08/11/97	Chain saw	SL/ 5.00	419.95	0.00	419.95	419.95	0.00	419.95
10/01/97	Northern Hydraulics	SL/ 5.00	8,233.29	0.00	8,233.29	8,233.29	0.00	8,233.29
10/19/97	2 Way radio	SL/ 5.00	514.86	0.00	514.86	514.86	0.00	514.86
11/03/97	File cabinets	SL/ 7.00	547.92	0.00	547.92	547.92	0.00	547.92
12/20/97	Washing machine	SL/ 7.00	409.00	0.00	409.00	409.00	0.00	409.00
01/28/98	Vertical blinds	SL/ 7.00	966.00	0.00	966.00	966.00	0.00	966.00
02/03/98	Nail gun	SL/ 5.00	531.84	0.00	531.84	531.84	0.00	531.84
04/14/98	Billy Goat	SL/ 5.00	2,169.00	0.00	2,169.00	2,169.00	0.00	2,169.00
05/19/98	Sand blaster	SL/ 5.00	454.19	0.00	454.19	454.19	0.00	454.19
08/19/98	Desk and credenza	SL/ 7.00	5,500.00	0.00	5,500.00	5,500.00	0.00	5,500.00
09/30/98	Range	SL/ 5.00	409.00	0.00	409.00	409.00	0.00	409.00
01/29/99	Printer and copier	SL/ 5.00	1,454.98	0.00	1,454.98	1,454.98	0.00	1,454.98
03/25/99	Range	SL/ 5.00	409.00	0.00	409.00	409.00	0.00	409.00
03/25/99	Refrigerator	SL/ 5.00	479.00	0.00	479.00	479.00	0.00	479.00
06/04/99	Computer	SL/ 5.00	1,491.94	0.00	1,491.94	1,491.94	0.00	1,491.94
12/26/02	Computer	SL/ 5.00	797.37	0.00	797.37	797.37	0.00	797.37
06/07/04	Piano (Commons house)	SL/ 7.00	3,000.00	0.00	3,000.00	1,928.57	428.57	2,357.14
09/06/05	Refirgerator for #5	SL/ 7.00	474.98	0.00	474.98	237.48	67.85	305.33
03/13/06	New ranges for 9S & 7	SL/ 7.00	853.55	0.00	853.55	426.79	121.94	548.73
07/19/06	Regulator for #8	MSL/ 7.00	173.07	0.00	173.07	61.80	24.72	86.52
10/16/06	Appliances for commons house	MSL/ 7.00	3,465.98	0.00	3,465.98	1,237.85	495.14	1,732.99
03/09/09	Recording equip library	MSL/ 5.00	844.47	0.00	844.47	84.45	168.89	253.34
03/11/09	IMAC (library)	MSL/ 5.00	1,415.00	0.00	1,415.00	141.50	283.00	424.50
Grand totals. 1200 - FURN, FIXTURES AND EQUIP (47 assets)			115,059.60	0.00	115,059.60	108,950.99	1,590.11	110,541.10
ASSET A/C#: 1210 - VEHICLES								
01/01/85	1983 Dodge Pickup	SL/ 5.00	7,160.30	0.00	7,160.30	7,160.30	0.00	7,160.30
12/30/95	1987 Toyota Pickup	SL/ 5.00	10,345.50	0.00	10,345.50	10,345.50	0.00	10,345.50
01/01/96	1995 Nuway utility trailer	SL/ 5.00	500.00	0.00	500.00	500.00	0.00	500.00
08/04/97	Utility trailer	SL/ 5.00	559.27	0.00	559.27	559.27	0.00	559.27
11/17/99	1997 Pontiac	SL/ 5.00	13,800.00	0.00	13,800.00	13,800.00	0.00	13,800.00

ASSET DEPRECIATION SHORT REPORT

THE HELENE WURLITZER FOUNDATION ***Mar. 31, 2010***

Sorted ASSET A/C#
Method. 1-FEDERAL-Std Conv Applied

Range. 1200 - 1250
Include. All assets

Date Acq	Description	Meth/Life	Cost	Section 179	Depr Basis	Includes Section 179 Beg A/Depr	Curr Depr	End A/Depr
Grand totals:	1210 - VEHICLES (5 assets)		32,365 07	0 00	32,365 07	32,365 07	0.00	32,365.07
ASSET A/C#: 1220 - 1220 BUILDINGS								
04/01/98	Buildings	SL/20 00	186,460 12	0 00	186,460 12	186,460.12	0 00	186,460.12
Grand totals·	1220 - 1220 BUILDINGS (1 assets)		186,460 12	0 00	186,460.12	186,460 12	0.00	186,460.12
ASSET A/C#: 1230 - BUILDING IMPROVEMENTS								
01/01/90	Prior assets	SL/20.00	52,254.92	0.00	52,254 92	52,254.92	0.00	52,254 92
01/01/96	1996 Improvements	SL/20 00	8,980 14	0.00	8,980 14	5,949.38	449 01	6,398 39
09/30/96	1997 Improvements	SL/20.00	51,959.07	0.00	51,959.07	32,474.38	2,597.95	35,072 33
09/30/97	1998 Improvements	SL/20.00	82,926.23	0 00	82,926 23	48,028 12	4,146 31	52,174 43
09/30/98	1999 Improvements	SL/20 00	111,789 77	0 00	111,789 77	58,689 64	5,589 49	64,279 13
09/30/99	2000 Improvements	SL/20.00	82,716 42	0 00	82,716.42	39,295.96	4,135.82	43,431 78
09/30/00	2001 Improvements	SL/20 00	125,821 13	0 00	125,821.13	53,474.01	6,291.06	59,765.07
09/30/01	2002 Improvements	SL/20 00	85,102 63	0 00	85,102 63	31,919 30	4,255.13	36,174.43
09/30/02	2003 Improvements	SL/20 00	37,091 92	0 00	37,091 92	12,054 90	1,854 60	13,909 50
04/30/03	New fence	SL/10.00	2,045.85	0.00	2,045 85	1,401.41	143 21	1,544 62
04/01/04	2005 Improvements	SL/20 00	14,535 54	0 00	14,535 54	3,633 90	726 78	4,360 68
10/01/05	2006 Improvements	SL/20 00	30,900 69	0 00	30,900 69	5,407.61	1,545.03	6,952 64
10/01/06	FYE 033107 Improvements	MSL/20 00	10,059.63	0 00	10,059 63	1,257 45	502 98	1,760 43
04/04/07	Commons house lights/smoke detector	MSL/20 00	1,018.31	0.00	1,018.31	76.38	50.92	127 30
09/06/07	Commons house laundry and coat room	MSL/20 00	1,148 95	0 00	1,148 95	86 17	57.45	143.62
03/31/08	Roof repairs/new construction	MSL/20 00	21,084 40	0 00	21,084 40	1,581 33	1,054.22	2,635 55
05/28/08	Commons house concrete work	MSL/20 00	4,000 00	0 00	4,000.00	100 00	200.00	300.00
06/07/08	Tile work (bathrooms, etc)	MSL/20 00	4,348 82	0 00	4,348 82	108 72	217 44	326 16
09/30/08	Blinds	MSL/ 7 00	4,360 60	0 00	4,360 60	311 47	622 94	934.41
10/01/09 A	Various improvements	MSL/20 00	0 00	0.00	0 00	0 00	0 00	0.00
Grand totals	1230 - BUILDING IMPROVEMENTS (20 assets)		732,145 02	0 00	732,145.02	348,105 05	34,440.34	382,545.39
ASSET A/C#: 1240 - 1240 LAND								
01/01/50	Land	LAND/ 7.00	10,346 15	0.00	10,346.15	0 00	0 00	0 00
04/01/98	1998 Land additions	LAND/ 7 00	41,749.55	0 00	41,749 55	0.00	0 00	0 00
Grand totals	1240 - 1240 LAND (2 assets)		52,095 70	0 00	52,095 70	0.00	0 00	0.00
ASSET A/C#: 1250 - LAND IMPROVEMENTS								
09/30/08	Parking lot improvements	MSL/39.00	8,000 00	0 00	8,000 00	111.11	205.13	316.24
Grand totals·	1250 - LAND IMPROVEMENTS (1 assets)		8,000 00	0 00	8,000 00	111 11	205 13	316 24
Grand totals for all accounts: (76 assets)			1,126,125 51	0 00	1,126,125 51	675,992.34	36,235 58	712,227 92

Codes that may appear next to the date acquired include: A - Addition, D - Disposal, T - Traded, MQ - Mid Quarter Applied

Additional Summary Statistics:	Cost	Curr Yr 179	Prior Yr 179	Depr Basis	Beg A/Depr	Curr Depr	Ending A/Depr	Net Book Val
Grand Totals for All Assets	1,126,125 51	0 00	0 00	1,126,125.51	675,992 34	36,235 58	712,227.92	413,897 59
Less. Inactive Assets	0 00	0.00	0.00	0 00	0.00	0 00	0 00	0.00
Disposed Assets	0 00	0 00	0 00	0 00	0 00	0 00	0 00	0.00
Traded Assets	0 00	0 00	0.00	0.00	0 00	0 00	0.00	0.00
Net Totals (Active Assets)	1,126,125 51	0 00	0 00	1,126,125 51	675,992.34	36,235 58	712,227.92	413,897 59

Total Additional First Year Depreciation Taken at 30% Rate: ***0.00***

Total Additional First Year Depreciation Taken at 50% Rate: ***0.00***

Total Additional First Year Depreciation Taken: ***0.00***

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

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

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

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed)

Type or print File by the extended due date for filing the return See instructions	Name of Exempt Organization The Helene Wurlitzer Foundation of New		Employer identification number 85-0128634
	Number, street, and room or suite no If a P O box, see instructions PO Box 1891		For IRS use only
	City, town or post office, state, and ZIP code For a foreign address, see instructions Taos, NM 87571		

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

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

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

- The books are in the care of ▶ MICHAEL A KNIGHT

  Telephone No ▶ 575-758-2413 FAX No ▶
- If the organization does not have an office or place of business in the United States, check this box . . . . ▶ ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ If this is for the whole group, check this box . . ▶ ☐ If it is for part of the group, check this box . . ▶ ☐ and attach a list with the names and EINs of all members the extension is for

4 I request an additional 3-month extension of time until 02-15 , 20 11

5 For calendar year ______, or other tax year beginning 04-01 , 20 09 and ending 03-31 , 20 10

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

7 State in detail why you need the extension

Taxpayer needs additional time to assure a complete and accurate return.

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

Signature and Verification

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

Signature ▶ Andrew Kesper Title ▶ CPA Date ▶ 11/15/2010