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

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning 5/01, 2009, and ending 4/30, 2010

G Check all that apply. ☐ Initial return ☐ Initial Return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name changeUse the
IRS label.
Otherwise,
print
or type.
See Specific
Instructions.ZADECK FAMILY FOUNDATION
401 EDWARDS STREET, SUITE 900
SHREVEPORT, LA 71101-5510

A Employer identification number

72-1372337

B Telephone number (see the instructions)

318-227-1330

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, column (c), line 16)

\$ 271,564.

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 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 (att sch)

10,655.

2 Cl ☒ if the foundn is not req to att Sch B

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

11,621.

11,621.

11,621.

5a Gross rents
b Net rental income or (loss)

6a Net gain/(loss) from sale of assets not on line 10

35,796.

b Gross sales price for all assets on line 6a 65,113.

7 Capital gain net income (from Part IV, line 2)

35,796.

8 Net short-term capital gain

25,531.

9 Income modifications

10a Gross sales less returns and allowances

b Less Cost of goods sold

c Gross profit/(loss) (att sch)

11 Other income (attach schedule)

12 Total. Add lines 1 through 11

58,072.

47,417.

37,152.

13 Compensation of officers, directors, trustees, etc

0.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule)

b Accounting fees (attach sch) SEE ST 1

1,225.

c Other prof fees (attach sch)

17 Interest

18 Taxes (attach schedule)(see instr) SEE STM 2

772.

767.

19 Depreciation (attach sch) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

SEE STATEMENT 3

288.

288.

24 Total operating and administrative expenses. Add lines 13 through 23

2,285.

767.

1,518.

25 Contributions, gifts, grants paid PART XV

55,841.

55,841.

26 Total expenses and disbursements. Add lines 24 and 25

58,126.

767.

0.

57,359.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

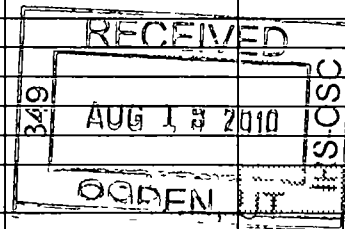
-54.

b Net investment income (if negative, enter -0-)

46,650.

c Adjusted net income (if negative, enter -0-)

37,152.



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	4,663.	14,957.	
	2	Savings and temporary cash investments	6,640.	2,264.	
	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 the instructions)			
	7	Other notes and loans receivable (attach sch)			
		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)	271,282.	265,310.	271,564.
	c	Investments — corporate bonds (attach schedule)			
	LIABILITIES	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			
		Less: accumulated depreciation (attach schedule)			
15		Other assets (describe)			
16		Total assets (to be completed by all filers — see instructions. Also, see page 1, item I)	282,585.	282,531.	271,564.
17		Accounts payable and accrued expenses			
18		Grants payable			
NET ASSET BALANCES	19	Deferred revenue			
	20	Loans from officers, directors, trustees, & 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.	
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
27	Capital stock, trust principal, or current funds				
28	Paid-in or capital surplus, or land, building, and equipment fund				
29	Retained earnings, accumulated income, endowment, or other funds	282,585.	282,531.		
30	Total net assets or fund balances (see the instructions)	282,585.	282,531.		
31	Total liabilities and net assets/fund balances (see the instructions)	282,585.	282,531.		

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	282,585.
2	Enter amount from Part I, line 27a	2	-54.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	282,531.
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	282,531.

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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a SEE STATEMENT 4				
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			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(j) Fair Market Value as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of column (i) over column (j), if any	
a			
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	35,796.
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 the instructions) If (loss), enter -0- in Part I, line 8] —	3	25,531.

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)

N/A

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 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 (column (b) divided by column (c))
2008			
2007			
2006			
2005			
2004			

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

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

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

1 a 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 instr.)		1	933.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (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	933.
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	933.
6 Credits/Payments:			
a 2009 estimated tax pmts and 2008 overpayment credited to 2009	6a	640.	
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	640.	
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	293.	
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	11		

Part VII-A Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?		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?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ▶ \$ 0. (2) On foundation managers ▶ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities		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		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T		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?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) LA		
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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If 'Yes,' complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities Continued

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>JULIE ZADECK</u> Telephone no. <u>318-227-1330</u> Located at <u>401 EDWARDS STREET, SHREVEPORT, LA</u> ZIP + 4 <u>71101</u>			
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 <u>15</u>	N/A		N/A

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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 the instructions)? Organizations relying on a current notice regarding disaster assistance check here ☐	1b	N/A
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 <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
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 the instructions)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
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	N/A
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

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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 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 instructions)?

5b N/A

Organizations relying on a current notice regarding disaster assistance check here

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

If 'Yes,' attach the statement required by Regulations section 53.4945-5(d)

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

6b X

If 'Yes' to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b N/A

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 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
DONALD J ZADECK 401 EDWARDS STREET STE 900 SHREVEPORT, LA 71101	PRESIDENT 0	0.	0.	0.
FRANK KENNETH ZADECK 401 EDWARDS STREET STE 900 SHREVEPORT, LA 71101	VICE-PRESIDE 0	0.	0.	0.
FRANCES K ZADECK 401 EDWARDS STREET STE 900 SHREVEPORT, LA 71101	VICE-PRESIDE 0	0.	0.	0.
JULIE ZADECK 401 EDWARDS STREET STE 900 SHREVEPORT, LA 71101	SECRETARY 0	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1— see 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

0

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 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 0**Part IX-A** Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see 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 instructions.	
3	
Total. Add lines 1 through 3	0.

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see 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	256,967.
b Average of monthly cash balances	1b	14,660.
c Fair market value of all other assets (see instructions)	1c	
d Total (add lines 1a, b, and c)	1d	271,627.
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	271,627.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	4,074.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	267,553.
6 Minimum investment return. Enter 5% of line 5	6	13,378.

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

1 Minimum investment return from Part X, line 6		1	13,378.
2a Tax on investment income for 2009 from Part VI, line 5	2a	933.	
b Income tax for 2009. (This does not include the tax from Part VI.)	2b		
c Add lines 2a and 2b		2c	933.
3 Distributable amount before adjustments. Subtract line 2c from line 1		3	12,445.
4 Recoveries of amounts treated as qualifying distributions		4	
5 Add lines 3 and 4		5	12,445.
6 Deduction from distributable amount (see instructions)		6	
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	12,445.

Part XII Qualifying Distributions (see 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	57,359.
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	57,359.
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 instructions)	5	
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	57,359.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				12,445.
2 Undistributed income, if any, as of the end of 2009:				
a Enter amount for 2008 only			0.	
b Total for prior years: 20 __, 20 __, 20 __		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	9,923.			
b From 2005	28,249.			
c From 2006	16,001.			
d From 2007	35,384.			
e From 2008	54,257.			
f Total of lines 3a through e	143,814.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 57,359.				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required – see instructions)		0.		
c Treated as distributions out of corpus (Election required – see instructions)	0.			
d Applied to 2009 distributable amount				12,445.
e Remaining amount distributed out of corpus	44,914.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	188,728.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount – see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount – see instructions			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	9,923.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	178,805.			
10 Analysis of line 9:				
a Excess from 2005	28,249.			
b Excess from 2006	16,001.			
c Excess from 2007	35,384.			
d Excess from 2008	54,257.			
e Excess from 2009	44,914.			

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

N/A

1 a 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)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

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

Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year — see 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 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

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
<i>a</i> Paid during the year SEE STATEMENT 5				
Total			3a	55,841.
<i>b</i> Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
		(a) Business code	(b) Amount	(c) Exclu- sion 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	11,621.	
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					35,796.
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).				11,621.	35,796.
13	Total. Add line 12, columns (b), (d), and (e)				13	47,417.

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

[illegible]

ZADECK FAMILY FOUNDATION

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STATEMENT 1
FORM 990-PF, PART I, LINE 16B
ACCOUNTING FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
	\$ 1,225.			\$ 1,225.
TOTAL	\$ 1,225.	\$ 0.	\$ 0.	\$ 1,225.

STATEMENT 2
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX	\$ 107.	\$ 107.		
FOREIGN TAXES ON INVESTMENTS	20.	20.		
SECRETARY OF STATE ANNUAL REPORT	5.			\$ 5.
TAX ESTIMATE PAYMENTS	640.	640.		
TOTAL	\$ 772.	\$ 767.	\$ 0.	\$ 5.

STATEMENT 3
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK CHARGES	\$ 162.			\$ 162.
THE TIMES AD	126.			126.
TOTAL	\$ 288.	\$ 0.	\$ 0.	\$ 288.

STATEMENT 4
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
1	139.1291 AT&T	PURCHASED	VARIOUS	7/20/2009
2	496.4177 AT&T	PURCHASED	VARIOUS	7/20/2009
3	164.4532 AT&T	PURCHASED	VARIOUS	7/20/2009
4	250 CHEVRON	PURCHASED	11/04/2009	11/05/2009
5	127.6916 CHEVRON	PURCHASED	11/04/2009	2/03/2010
6	122.3084 CHEVRON	PURCHASED	11/04/2009	2/03/2010
7	2 CHEVRON	PURCHASED	12/11/2009	3/02/2010
8	.1791 CHEVRON	PURCHASED	12/11/2009	3/02/2010
9	300 NEXEN	PURCHASED	10/18/2006	6/01/2009

ZADECK FAMILY FOUNDATION

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STATEMENT 4 (CONTINUED)
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
1	3,373.		5,489.	-2,116.				\$ -2,116.
2	12,035.		5,244.	6,791.				6,791.
3	3,987.		4,463.	-476.				-476.
4	19,344.		4,528.	14,816.				14,816.
5	9,424.		2,313.	7,111.				7,111.
6	9,027.		5,414.	3,613.				3,613.
7	148.		156.	-8.				-8.
8	13.		14.	-1.				-1.
9	7,762.		1,696.	6,066.				6,066.
							TOTAL	\$ 35,796.

STATEMENT 5
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
THE STRAND THEATRE P O BOX 1547 SHREVEPORT, LA 71165-1547,	NONE	501	SUPPORT OF PROGRAM	\$ 500.
SHREVEPORT OPERA 212 TEXAS SUITE 101 SHREVEPORT, LA 71101,	NONE	501	SUPPORT OF PROGRAMS	2,000.
LSU HEALTH SCIENCES FOUNDATION 1501 KINGS HWY SHREVEPORT, LA 71103,	NONE	501	CANCER RESEARCH	12,850.
CENTENARY COLLEGE 2911 CENTENARY BLVD SHREVEPORT, LA 71134,	NONE	501	STUDENT RESEARCH FUND	1,000.
BOY SCOUTS OF AMERICA 3508 BEVERLY PLACE SHREVEPORT, LA 71101,	NONE	501	SUPPORT OF PROGRAM	500.
DEAF ACTION CENTER 601 JORDAN STREET SHREVEPORT, LA 71101,	NONE	501	SUPPORT PROGRAMS FOR HEARING IMPAIRED	200.
COMMUNITY FOUNDATION 401 EDWARDS STREET STE 105 SHREVEPORT, LA 71101,	NONE	501	SUPPORT OF RESEARCH	500.

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STATEMENT 5 (CONTINUED)
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
SALVATION ARMY P. O. BOX 18006 SHREVEPORT, LA 71138	NONE	501	SUPPORT OF PROGRAM	\$ 200.
SOUTHFIELD SCHOOL 1100 SOUTHFIELD ROAD SHREVEPORT, LA 71106,	NONE	501	EDUCATIONAL SUPPORT	500.
B'NAI ZION CONGREGATION 245 SOUTHFIELD RD SHREVEPORT, LA 71105,	NONE	501	RELIGIOUS ORGANIZATION	5,725.
FRIENDS OF GREENWOOD CEMETERY P O BOX 4492 SHREVEPORT, LA 71134,	NONE	501	PROVIDES SUPPORT TO PRESERVE HISTORICAL CEMETERY	250.
SPECIAL OLYMPICS P O BOX 189 HAMMOND, LA 70404-0189,	NONE	501	SPORTS PROGRAMS FOR PERSONS WITH DISABILITES	200.
LSU ALUMNI ASSOCIATION 3838 WEST LAKESHORE DR BATON ROUGE, LA 70808	NONE	501	SUPPORT OF EDUCATIONAL PROGRMS AT LSU.	250.
GEORGETOWN UNIVERSITY ANNUAL UNIVERSITY BOX 571253 WASHINGTON, DC 20057	NONE	501	SCHOLARSHIPS FOR UNDERGRADUATES	1,000.
FRIENDS OF CHAPPAQUA LIBRARY P O BOX 445 CHAPPAQUA, NY 10514	NONE	501	SUPPORTS PROGRAMS, MATERIALS AND BUILDING IMPROVEMENTS FOR LIBRARY	500.
FRIENDS OF LA STATE EXHIBIT MU P O BOX 38356 SHREVEPORT, LA 71133	NONE	501	PROGRAMS SUPPORT LEARNING OF STATE HISTORY AND CULTURE	250.
GOLDRING WOLDENBERG INSTITUTE P O BOX 16528 JACKSON, MS 39236	NONE	501	SUPPORTS PRESERVATION OF SOUTHERN JEWISH LIFE	2,501.
NY NJ TRAIL CONFERENCE 156 RAMAPO VALLEY RD MAHWAH, NJ 07430	NONE	501	DEVELOPS AND MAINTAINS HIKING TRAILS	500.

ZADECK FAMILY FOUNDATION

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STATEMENT 5 (CONTINUED)
 FORM 990-PF, PART XV, LINE 3A
 RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
RICE ANNUAL FUND P O BOX 1892 HOUSTON, TX 77251	NONE	501	SUPPORTS SCHOLARSHIP PROGRAMS	\$ 2,000.
SHREVEPORT GREEN 3625 SOUTHERN AVE SHREVEPORT, LA 71104	NONE	501	IMPROVING ENVIROMENT THROUGH EDUCATION, LITTER ABATEMENT AND RECYCLING	150.
TEMPLE BETH EL OF NORTHERN 220 S BEDFORD RD CHAPPAQUA, NY 10514	NONE	501	SUPPORTS RELIGIOUS PROGRAMS	2,000.
YALE UNIVERSITY ANNUAL GIVING P O BOX 2038 NW HAVEN, CT 06521	NONE	501	SUPPORTS ACADEMIC PROGRAMS	2,000.
TULANE UNIVERSITY 3439 PRYTANIA ST, SUITE 200 NEW ORLEANS, LA 70115	NONE	501	EDUCATIONAL SUPPORT	5,000.
NORTH LA JEWISH FEDERATION 4700 LINE AVE SUITE 117 SHREVEPORT, LA 71106	NONE	501	SUPPORTS LOCAL, NATIONAL AND INTERNATIONAL NEEDS	1,925.
DUCKS UNLIMITED ONE WATERFOWL WAY MEMPHIS, TN 38120	NONE	501	WETLANDS AND WATERFOWL CONSERVATION	2,250.
LSUS FOUNDATION ONE UNIVERSITY PLACE SHREVEPORT, LA 71115	NONE	501	PROVIDES FINANCIAL ASSISTANCE TO STUDENTS	1,000.
B'NAI ZION BROTHERHOOD 245 SOUTHFIELD ROAD SHREVEPORT, LA 71105	NONE	501	RELIGIOUS ORGANIZATION	25.
B'NAI ZION SISTERHOOD 245 SOUTHFIELD RD SHREVEPORT, LA 71105	NONE	501	RELIGIOUS ORGANIZATION	40.
B'NAI ZION ENDOWMENT FUND 245 SOUTHFIELD ROAD SHEVEPORT, LA 71105	NONE	501	SUPPORTS RELIGIOUS ORGANIZATION	5,000.

ZADECK FAMILY FOUNDATION

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STATEMENT 5 (CONTINUED)
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
ACADEMY OF CHILDREN'S THEATRE 807 SLATTERY BLVD SHREVEPORT, LA 71104	NONE	501	SUPPORT OF PROGRAM	\$ 500.
CADDO MAGNET HIGH SCHOOL - FRINGE FUND 1607 VIKING DRIVE SHREVEPORT, LA 71101	NONE	501	SUPPORT OF SCHOOL DRAMA PROGRAM	3,000.
CHURCH OF THE REDEEMER 504 TECH DRIVE RUSTON, LA 71273	NONE	501	SUPPORTS RECTOR'S DISCRETION FUND	100.
JUNIOR ACHIEVEMENT OF NORTH LOUISIANA 3825 GILBERT DRIVE SHREVEPORT, LA 71104	NONE	501	SUPPORTS TRAINING PROGRAM FOR VOLUNTEERS	100.
LOYOLA COLLEGE PREP 921 JORDON ST SHREVEPORT, LA 71101	NONE	501	SUPPORT OF SCHOOL PROGRAMS	500.
ROBINSON'S RESCUE, INC 504 KING'S HWY SHREVEPORT, LA 71105	NONE	501	SUPPORTS PROGRAM TO PROVIDE LOW COST SPAY AND NEUTERING OF ANIMALS	100.
SAMARITAN COUNCELING CENTER 1525 STEPHENS AVE SHREVEPORT, LA 71101	NONE	501	SUPPORT OF FAITH BASED FAMILY COUNSELING	600.
NORWELA COUNCIL 505 TRAVIS ST SHREVEPORT, LA 71101	NONE	501	SUPPORT OF SHERIFF'S SUMMER CAMP	100.
LOUISIANA SPCA 1700 MARFI GRAS BLVD NEW ORLEANS, LA 70114	NONE	501	SUPPORT OF ANIMAL RESCUE PROGRAMS	25.

TOTAL \$ 55,841.