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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 JUN 1, 2009, and ending MAY 31, 2010

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 JOHN STAUFFER CHARITABLE TRUST		A Employer identification number 23-7434707
	Number and street (or P.O. box number if mail is not delivered to street address)	Room/suite	B Telephone number 626-793-9400
	City or town, state, and ZIP code PASADENA, CA 91101-4108		C If exemption application is pending, check here <input type="checkbox"/>
	City or town, state, and ZIP code PASADENA, CA 91101-4108		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 38,254,376.		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received			N/A	
2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments	188.	188.		STATEMENT 1
4	Dividends and interest from securities	1,136,181.	1,136,181.		STATEMENT 2
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	98,832.			
b	Gross sales price for all assets on line 6a	5,125,715.			
7	Capital gain net income (from Part IV, line 2)		98,832.		
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)				
11	Other income	<310.>	<310.>		STATEMENT 3
12	Total. Add lines 1 through 11	1,234,891.	1,234,891.		
13	Compensation of officers, directors, trustees, etc.	390,000.	156,000.		234,000.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees STMT 4	7,438.	5,653.		1,785.
b	Accounting fees STMT 5	23,875.	21,488.		2,387.
c	Other professional fees STMT 6	91,949.	91,949.		0.
17	Interest				
18	Taxes STMT 7	17,365.	17,360.		5.
19	Depreciation and depletion				
20	Occupancy	12,380.	11,761.		619.
21	Travel, conferences, and meetings				
22	Printing and publications	1,815.	1,815.		0.
23	Other expenses STMT 8	64,891.	64,891.		0.
24	Total operating and administrative expenses. Add lines 13 through 23	609,713.	370,917.		238,796.
25	Contributions, gifts, grants paid	1,785,170.			1,785,170.
26	Total expenses and disbursements. Add lines 24 and 25	2,394,883.	370,917.		2,023,966.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	<1,159,992.>			
b	Net investment income (if negative, enter -0-)		863,974.		
c	Adjusted net income (if negative, enter -0-)			N/A	

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Part II Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	2,722,523.	1,415,196.	1,415,196.
	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			
	7 Other notes and loans receivable ▶			
	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 STMT 9	12,202,602.	11,627,217.	12,143,254.
	b Investments - corporate stock STMT 10	19,474,174.	20,217,944.	20,829,151.
	c Investments - corporate bonds STMT 11	3,650,570.	3,654,937.	3,810,577.
11 Investments - land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
12 Investments - mortgage loans STMT 12	62,010.	49,331.	54,043.	
13 Investments - other STMT 13	26,188.	25,878.	1,132.	
14 Land, buildings, and equipment: basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶ STATEMENT 14)	13,451.	1,023.	1,023.	
16 Total assets (to be completed by all filers)	38,151,518.	36,991,526.	38,254,376.	
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			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	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 ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	38,151,518.	36,991,526.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
29 Retained earnings, accumulated income, endowment, or other funds	0.	0.		
30 Total net assets or fund balances	38,151,518.	36,991,526.		
31 Total liabilities and net assets/fund balances	38,151,518.	36,991,526.		

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	38,151,518.
2 Enter amount from Part I, line 27a	2	<1,159,992.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	36,991,526.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	36,991,526.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	GAIN ON SALE OF ASSETS - SEE ATTACHED	P	VARIOUS	VARIOUS
b	LOSS ON SALE OF ASSETS - SEE ATTACHED	P	VARIOUS	VARIOUS
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 4,125,715.		4,026,840.	98,875.
b 1,000,000.		1,000,043.	<43.>
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			98,875.
b			<43.>
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	98,832.
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). If (loss), enter -0- in Part I, line 8		3	N/A

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 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	577,144.	37,098,222.	.015557
2007	2,615,964.	45,734,784.	.057199
2006	2,300,050.	43,698,621.	.052634
2005	2,488,083.	44,109,892.	.056406
2004	2,539,787.	44,297,193.	.057335

2 Total of line 1, column (d)	2	.239131
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	.047826
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	37,248,434.
5 Multiply line 4 by line 3	5	1,781,444.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	8,640.
7 Add lines 5 and 6	7	1,790,084.
8 Enter qualifying distributions from Part XII, line 4 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.	8	2,023,966.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	8,640.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	8,640.
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	8,640.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	33,114.	
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	33,114.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> 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	24,474.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input checked="" type="checkbox"/> Refunded <input type="checkbox"/>	11	0.	

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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
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. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 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
4a 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?		
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, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> CA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	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

N/A

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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 WWW.GUIDESTAR.ORG	13	X	
14	The books are in care of LAGERLOF, SENEAL, ET AL Telephone no. 626-793-9400 Located at 301 N. LAKE AVENUE, FLOOR 10, PASADENA, CA ZIP+4 91101-4108			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year 15 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1b	X
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years N/A		
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 instructions.) N/A	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. N/A		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

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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)?

☐ 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)?

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?

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(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
MICHAEL R. WHALEN 4705 LAUREL CANYON BLVD., SUITE 204 VALLEY VILLAGE, CA 91607	TRUSTEE VARIABLE TO 10	130,000.	0.	0.
H. JESS SENECA 301 N. LAKE AVENUE PASADENA, CA 91101	TRUSTEE VARIABLE TO 10	130,000.	0.	0.
JOHN F. BRADLEY 180 SOUTH LAKE AVENUE, SUITE 440 PASADENA, CA 91101	TRUSTEE VARIABLE TO 10	130,000.	0.	0.

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

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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	36,759,230.
b	Average of monthly cash balances	1b	1,055,305.
c	Fair market value of all other assets	1c	1,134.
d	Total (add lines 1a, b, and c)	1d	37,815,669.
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	37,815,669.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	567,235.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	37,248,434.
6	Minimum investment return. Enter 5% of line 5	6	1,862,422.

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	1,862,422.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	8,640.
b	Income tax for 2009 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	8,640.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,853,782.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,853,782.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,853,782.

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	2,023,966.
b	Program-related investments - total from Part IX-B	1b	0.
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	2,023,966.
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	5	8,640.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	2,015,326.

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.

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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				1,853,782.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	143,742.			
b From 2005	332,229.			
c From 2006	130,316.			
d From 2007	438,849.			
e From 2008				
f Total of lines 3a through e	1,045,136.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$	2,023,966.			
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				1,853,782.
e Remaining amount distributed out of corpus	170,184.			
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	1,215,320.			
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 instr.			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)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	143,742.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	1,071,578.			
10 Analysis of line 9:				
a Excess from 2005	332,229.			
b Excess from 2006	130,316.			
c Excess from 2007	438,849.			
d Excess from 2008				
e Excess from 2009	170,184.			

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS	188.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	188.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDENDS AND INTEREST FROM SECURITIES	1,136,181.	0.	1,136,181.
TOTAL TO FM 990-PF, PART I, LN 4	1,136,181.	0.	1,136,181.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
INVESTMENT LOSS FROM JMB IV	<310.>	<310.>	
TOTAL TO FORM 990-PF, PART I, LINE 11	<310.>	<310.>	

FORM 990-PF LEGAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LAGERLOF, SENEAL, GOSNEY & KRUSE, LLP	7,438.	5,653.		1,785.
TO FM 990-PF, PG 1, LN 16A	7,438.	5,653.		1,785.

FORM 990-PF	ACCOUNTING FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
LAGERLOF, SENEAL, GOSNEY & KRUSE, LLP	20,625.	18,563.		2,062.	
MARTIN WERBELOW LLP	3,250.	2,925.		325.	
TO FORM 990-PF, PG 1, LN 16B	23,875.	21,488.		2,387.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
EVERETT HARRIS & CO.	106,211.	106,211.		0.	
DEUTSCHE INVESTMENT MGMT AMERICAS	<14,262.>	<14,262.>		0.	
TO FORM 990-PF, PG 1, LN 16C	91,949.	91,949.		0.	

FORM 990-PF	TAXES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FRANCHISE TAX BOARD	10.	5.		5.	
FOREIGN TAXES	17,355.	17,355.		0.	
TO FORM 990-PF, PG 1, LN 18	17,365.	17,360.		5.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
AMORTIZATION	63,895.	63,895.			0.
ADR PASS THRU FEES	996.	996.			0.
TO FORM 990-PF, PG 1, LN 23	64,891.	64,891.			0.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS			STATEMENT	9
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE	
US TREASURY NOTE 4.375% DUE 08/15/12	X		181,925.	194,006.	
FED HOME LOAN BANKS 4.8% 11/16/12	X		0.	0.	
US TREASURY NOTE 4.0% 2/15/14	X		586,979.	651,656.	
US TREASURY NOTE 5.125% 5/15/16	X		249,465.	287,148.	
US TREASURY NOTE 4.25% 8/15/15	X		590,746.	660,938.	
US TREASURY NOTE 4.5% 2/15/16	X		222,013.	250,629.	
FED HOME LOAN BANKS 4.375% 9/17/10	X		250,079.	252,993.	
US TREASURY NOTE 4.375% 12/15/10	X		184,634.	189,076.	
US TREASURY NOTE 4.875% 2/15/12	X		176,150.	187,551.	
US TREASURY NOTE 4.25% 11/15/13	X		409,659.	453,647.	
FED HOME LOAN BANKS 5.25% 9/13/13	X		201,629.	222,403.	
FED HOME LOAN MORTGAGE 5.5% 9/15/11	X		201,567.	212,263.	
FEDERAL HOME LOAN BANK NOTES 4% DUE 01/14/13	X		0.	0.	
FEDERAL FARM CREDIT BANK NOTES 4.75% DUE 7/15/13	X		0.	0.	
FEDERAL HOME LOAN BANK NOTES 4.5% DUE 05/14/15	X		0.	0.	
FEDERAL HOME LOAN BANK NOTES 3.15% DUE 04/14/11	X		149,331.	153,316.	
FEDERAL HOME LOAN BANK NOTES 3.375% DUE 9/29/09	X		0.	0.	
FEDERAL FARM CREDIT BANK NOTES 3.6% DUE 10/14/11	X		500,011.	518,736.	
FEDERAL HOME LOAN BANK NOTES 5.25% DUE 06/10/11	X		285,689.	293,368.	
FEDERAL FARM CREDIT BANK NOTES 5.05% DUE 12/02/15	X		0.	0.	

JOHN STAUFFER CHARITABLE TRUST

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FEDERAL HOME LOAN BANK NOTES 3.05% DUE 05/07/10	X	0.	0.
FEDERAL FARM CREDIT BANK NOTES 2.6% DUE 02/19/13	X	501,863.	515,051.
FEDERAL HOME LOAN BANK NOTES 1.85% DUE 03/25/11	X	0.	0.
FED HOME LOAN BANK NOTES 3.1% DUE 02/24/14	X	500,000.	508,438.
FED HOME LOAN BANK NOTES 3.375% DUE 10/20/10	X	504,214.	505,837.
FED HOME LOAN BANK NOTES 2.93% DUE 03/11/14	X	503,105.	516,918.
US TREASURY NOTE 7.25% DUE 05/15/16	X	318,607.	360,658.
FEDERAL HOME LOAN BANK NOTES 4.0% DUE 11/26/13	X	500,000.	507,802.
FEDERAL HOME LOAN BANK NOTES 3.125% DUE 12/13/13	X	483,423.	500,917.
FEDERAL FARM CREDIT BANK NOTES 2.25% DUE 02/17/12	X	500,243.	510,903.
FEDERAL FARM CREDIT BANK NOTES 2.84% DUE 05/19/14	X	500,020.	508,553.
FEDERAL HOME LOAN BANK NOTES 2.1% DUE 05/14/12	X	0.	0.
CALIFORNIA STATE GO 4.85% DUE 10/01/04	X	252,757.	260,342.
FEDERAL FARM CREDIT BANK NOTES 2.9% DUE 1/5/15	X	499,283.	512,596.
FEDERAL FARM CREDIT BANK NOTES 3.0% DUE 12/22/14	X	500,000.	504,549.
FEDERAL FARM CREDIT BANK NOTES 3.35% DUE 12/28/15	X	500,000.	505,427.
FEDERAL HOME LOAN BANK NOTES 1.5% DUE 1/16/13	X	498,805.	501,986.
FEDERAL HOME LOAN BANK NOTES 2.125% DUE 6/7/13	X	375,000.	375,091.
FEDERAL HOME LOAN BANK NOTES 3.125% DUE 7/7/14	X	500,020.	520,456.
TOTAL U.S. GOVERNMENT OBLIGATIONS		11,374,460.	11,882,912.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS		252,757.	260,342.
TOTAL TO FORM 990-PF, PART II, LINE 10A		11,627,217.	12,143,254.

FORM 990-PF

CORPORATE STOCK

STATEMENT 10

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
ABBOTT LABORATORIES	375,731.	379,101.
CISCO SYSTEMS	607,734.	579,000.
GENERAL ELECTRIC CO.	1,481,341.	981,000.
GOOGLE	627,719.	854,709.
JOHNSON & JOHNSON	636,336.	757,900.
PEPSICO, INC.	730,238.	817,570.
PROCTOR & GAMBLE CO.	570,828.	610,900.
ROYAL DUTCH PETROLEUM CO.	244,151.	524,000.
UNITED PARCEL SERVICE CLASS B	797,617.	690,360.
WELLS FARGO & CO.	343,745.	344,280.
MICROSOFT	623,547.	567,600.
WAL-MART STORES, INC.	947,721.	1,061,760.
ALCON INC.	283,538.	421,440.
APPLE INC.	219,531.	539,448.
BAXTER INTERNATIONAL	661,862.	527,875.
COSTCO WHOLESALE CORP	785,711.	873,750.
MCDONALDS CORP	858,479.	1,203,660.
1/100 BERKSHIRE HATHAWAY	773,735.	741,370.
CHEVRON CORP	685,147.	590,960.
CIA ENER DE MINAS ADR F	389,345.	423,311.
CONOCOPHILLIPS	1,009,764.	777,900.
DENTSPLY INT'L INC	547,320.	486,450.
GRUPO MODELO ORD SER C F	0.	0.
MEDTRONIC INC	616,664.	470,160.
NESTLE	1,039,078.	1,133,958.
NOVO-NORDISK A-S ADR F	364,325.	537,740.
THE CHARLES SCHWABB CO.	742,152.	571,900.
UNILEVER N V NY SHS	307,886.	273,100.
VODAFONE GROUP NEW ADR F	683,918.	502,500.
WAL-MART DE MEX SAB ADRF	439,835.	582,535.
YUM BRANDS INC	497,191.	614,250.
SPDR GOLD TRUST	362,206.	475,524.
CHINA MOBILE LTD	489,266.	465,700.
ZIMMER HOLDINGS	474,283.	447,440.
TOTAL TO FORM 990-PF, PART II, LINE 10B	20,217,944.	20,829,151.

FORM 990-PF	CORPORATE BONDS	STATEMENT 11
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
BELLSOUTH CORP. 5.2% 12/15/16	179,880.	193,513.
WELLS FARGO BANK 6.45% 2/1/11	252,560.	258,802.
GOLDMAN SACHS 5.7% 9/1/12	200,719.	209,490.
MORGAN STANLEY CO. 5.3% 3/1/13	251,771.	256,746.
HOUSEHOLD FIN CORP. 6.375% 10/15/11	202,305.	209,621.
MBNA CORP. 7.5% 3/15/12	291,720.	303,993.
CLOROX 5.45% 10/15/12	252,851.	271,281.
GENERAL ELECTRIC CAP 3.75% 12/15/09	0.	0.
HOME DEPOT 5.2% 3/1/11	250,912.	257,111.
BERKSHIRE HATHAWAY FIN NOTES 5.00% DUE 10/15/12	261,887.	271,546.
GENERAL ELECTRIC CAP. CORP. 4.8% DUE 05/01/13	246,360.	264,632.
TRICON GLOBAL 8.875% DUE 04/15/11	207,555.	211,783.
GENERAL MILLS 5.25% DUE 08/15/13	261,432.	273,062.
COMCAST CORP. NEW 6.5% DUE 01/15/15	260,004.	284,374.
CLOROX CO. 4.2% 01/15/10	0.	0.
MIDAMERICAN ENERGY SR. NOTE 5.875% DUE 10/1/12	534,981.	544,623.
TOTAL TO FORM 990-PF, PART II, LINE 10C	3,654,937.	3,810,577.

FORM 990-PF	MORTGAGE LOANS	STATEMENT 12
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
GNMA 8.00% 10/15/24	802.	858.
FNMA 7.50% 9/1/10	257.	260.
FNMA 7.50% 10/1/24	6,152.	6,865.
GNMA II 6.00% 12/20/28	32,794.	35,863.
FNMA 7.00% 4/1/31	3,558.	3,982.
FNMA 6.5% 6/1/16	5,768.	6,215.
TOTAL TO FORM 990-PF, PART II, LINE 12	49,331.	54,043.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	13
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
ENDOWMENT & FDTN REALTY LTD-JMB IV	FMV	25,878.	1,132.
TOTAL TO FORM 990-PF, PART II, LINE 13		25,878.	1,132.

FORM 990-PF	OTHER ASSETS	STATEMENT	14
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
MINERAL RIGHTS	2.	2.	2.
PREPAID INTEREST	13,449.	1,021.	1,021.
TO FORM 990-PF, PART II, LINE 15	13,451.	1,023.	1,023.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 15

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

H. JESS SENEAL
301 N. LAKE AVENUE
PASADENA, CA 911014108

TELEPHONE NUMBER

626-793-9400

FORM AND CONTENT OF APPLICATIONS

A LETTER STATING THE PURPOSE OF THE APPLICATION AND AMOUNT, TAX EXEMPT
STATUS FROM IRS AND STATE AUTHORITIES AND IRS PRIVATE FOUNDATION RULING.
GUIDELINES ARE AVAILABLE UPON REQUEST.

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

AWARDS MADE TO HOSPITALS, COLLEGES AND UNIVERSITIES IN CALIFORNIA.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 16

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
CALIFORNIA INSTITUTE OF TECHNOLOGY 1200 EAST CALIFORNIA BOULEVARD PASADENA, CA 91125	NONE CONSTRUCTION OF RESEARCH LABORATORY IN NEW CHEMISTRY BUILDING	UNIVERSITY	250,000.
CHILDREN'S HOSPITAL 4650 SUNSET BOULEVARD LOS ANGELES, CA 90054	NONE NEW HOSPITAL BUILDING AND NAMING OF JOHN STAUFFER CONFERENCE CENTER	HOSPITAL	500,000.
GOOD SAMARITAN HOSPITAL 1225 WILSHIRE BLVD. LOS ANGELES, CA 90017	NONE CREATION OF A PERIPHERAL ARTERY DISEASE (PAD) CARDIOLOGY LAB	HOSPITAL	100,000.
HARVEY MUDD COLLEGE 301 PLATT BOULEVARD CLAREMONT, CA 91711	NONE SUMMER RESEARCH FELLOWSHIP IN CHEMISTRY	COLLEGE	100,000.
HUNTINGTON MEMORIAL HOSPITAL 100 W. CALIFORNIA BLVD. PASADENA, CA 91109	NONE WEST TOWER CONSTRUCTION PROJECT	HOSPITAL	500,000.
LOMA LINDA UNIVERSITY ANDERSON STREET LOMA LINDA, CA 92350	NONE CONSTRUCTION OF LIFE SUPPORT CENTER IN NEW CENTENNIAL BUILDING	UNIVERSITY	125,000.
OCCIDENTAL COLLEGE 1600 CAMPUS ROAD LOS ANGELES, CA 90041	NONE CHALLENGE GRANT FOR ENDOWMENT OF RESEARCH PROGRAM IN CHEMISTRY/BIOCHEMISTRY	COLLEGE	210,170.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

1,785,170.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
APPROVED FOR FUTURE PAYMENT

STATEMENT 17

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
CALIFORNIA INSTITUTE OF TECHNOLOGY 1200 EAST CALIFORNIA BOULEVARD PASADENA, CA 91125	NONE CONSTRUCTION OF RESEARCH LABORATORY IN NEW CHEMISTRY BUILDING	UNIVERSITY	1250000.
HUNTINGTON MEMORIAL HOSPITAL 100 W. CALIFORNIA BLVD. PASADENA, CA 91109	NONE WEST TOWER CONSTRUCTION PROJECT	HOSPITAL	500,000.
HARVEY MUDD COLLEGE 301 PLATT BOULEVARD CLAREMONT, CA 91711	NONE SUMMER RESEARCH FELLOWSHIP IN CHEMISTRY	COLLEGE	400,000.
GOOD SAMARITAN HOSPITAL 1225 WILSHIRE BLVD. LOS ANGELES, CA 90017	NONE CREATION OF A PERIPHERAL ARTERY DISEASE (PAD) CARDIOLOGY LAB	HOSPITAL	400,000.
OCCIDENTAL COLLEGE 1600 CAMPUS ROAD LOS ANGELES, CA 90041	NONE CHALLENGE GRANT FOR ENDOWMENT OF RESEARCH PROGRAM IN CHEMISTRY/BIOCHEMISTRY	COLLEGE	420,340.
TOTAL TO FORM 990-PF, PART XV, LINE 3B			2,970,340.

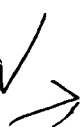
JOHN STAUFFER CHARITABLE TRUST

Gains on Sales of Assets

For the Period 06/01/09 - 05/31/10

Schedule 3STOCKS

<u>Date Sold</u>	<u>Date Acq'd</u>	<u>Description</u>	<u>Sales Proceeds</u>	<u>Carrying Value</u>	<u>Gain</u>
06/15/2009	n/a	settlement AIG	\$2,150.62	\$0.00	\$2,150.62
04/21/2010	n/a	settlement AOL Time Warner	629.20	0.00	629.20
07/31/2009	n/a	settlement Deutsche	4,005.44	0.00	4,005.44
03/08/2010	n/a	settlement Enron	11.90	0.00	11.90
09/25/2009	n/a	settlement Freddie Mac	4.05	0.00	4.05
03/08/2010	n/a	settlement Gemstar	34.16	0.00	34.16
01/11/2010	08/16/2007	15000 Shares Grupo Modelo Ord Ser C F	81,395.71	74,058.75	7,336.96
01/11/2010	09/12/2007	20000 Shares Grupo Modelo Ord Ser C F	108,527.61	98,009.95	10,517.66
01/11/2010	11/29/2007	40000 Shares Grupo Modelo Ord Ser C F	217,055.23	176,329.95	40,725.28
04/01/2010	n/a	settlement Qwest	586.97	0.00	586.97
08/04/2009	n/a	settlement Tenet Healthcare	7,938.51	0.00	7,938.51
03/30/2010	n/a	settlement Tenet Healthcare	420.03	0.00	420.03
12/16/2009	n/a	settlement United Health	17,741.42	0.00	17,741.42
03/30/2010	n/a	settlement Worldcom	214.61	0.00	214.61
<u>Total Stocks</u>			\$440,715.46	\$348,398.65	\$92,316.81



JOHN STAUFFER CHARITABLE TRUST

Gains on Sales of Assets

For the Period 06/01/09 - 05/31/10

Schedule 3BONDS & TREASURY NOTES

<u>Date Sold</u>	<u>Date Acq'd</u>	<u>Description</u>	<u>Sales Proceeds</u>	<u>Carrying Value</u>	<u>Gain</u>
12/15/2009	09/17/2007	\$250,000 Par Value - Due 2/15/2009 General Electric Capital Corp.	250,000.00	250,000.00	\$0.00
01/15/2010	06/23/2008	\$250,000 Par Value - Due 01/15/2010 Clorox Co. Sr. Notes	250,000.00	250,000.00	0.00
01/14/2010	07/08/2008	\$265,000 Par Value - Due 01/14/2013 Federal Home Loan Bk Nts 4.0%	265,000.00	262,384.19	2,615.81
07/15/2009	08/05/2008	\$500,000 Par Value - Due 07/15/2013 Federal Farm Cr Bank Nts 4.75%	500,000.00	499,694.06	305.94
05/24/2010	08/13/2008	\$250,000 Par Value - Due 05/14/2015 Federal Home Ln Bk 4.5%	250,000.00	246,363.12	3,636.88
09/29/2009	09/24/2008	\$500,000 Par Value - Due 09/29/2009 Federal Home Ln Bk 3.375%	500,000.00	500,000.00	0.00
12/02/2009	11/26/2008	\$500,000 Par Value - Due 12/02/2015 Federal Farm Cr Bank Nts 5.05%	500,000.00	500,000.00	0.00
05/07/2010	12/02/2008	\$500,000 Par Value - Due 05/07/2010 Federal Home Loan Bk Nts 3.05%	500,000.00	500,000.00	0.00
07/03/2009	03/04/2009	\$500,000 Par Value - Due 03/25/2011 Federal Home Loan Bk Nts 1.85%	500,000.00	500,000.00	0.00
05/14/2010	04/27/2009	\$170,000 Par Value - Due 05/14/2012 Federal Home Loan Bk Nts 2.1%	170,000.00	170,000.00	0.00
<u>Total Bonds</u>			<u>\$3,685,000.00</u>	<u>\$3,678,441.37</u>	<u>\$6,558.63</u>

TOTAL GAINS ON SALES OF ASSETS\$98,875.44

JOHN STAUFFER CHARITABLE TRUST

Losses on Sales of Assets

For the Period 06/01/08 - 05/31/09

Schedule 9

<u>Date Sold</u>	<u>Date Acq'd</u>	<u>Description</u>	<u>Sales Proceeds</u>	<u>Carrying Value</u>	<u>Loss</u>
<u>BONDS AND TREASURY NOTES</u>					
<u>Date Sold</u>		<u>Description</u>	<u>Sales Proceeds</u>	<u>Carrying Value</u>	<u>Loss</u>
11/16/2009	11/06/2007	\$500,000 Due: 11/16/2020 Federal Home Loan Bank Notes	\$500,000.00	\$500,021.08	\$21.08
04/19/2010	09/25/2009	\$500,000 Due: 04/19/2013 Federal Home Loan Bank Notes	500,000.00	500,022.41	22.41
<u>Total Bonds and Treasury Notes</u>			\$1,000,000.00	\$1,000,043.49	\$43.49