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Return of Private Foundation

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Serviceor 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.

For calendar year 2009, or tax year beginning JUL 1, 2009, and ending JUN 30, 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 PHOENIXVILLE COMMUNITY HEALTH FOUNDATION		A Employer identification number 23-2912035
	Number and street (or P O box number if mail is not delivered to street address) 821 GAY STREET		B Telephone number 610-917-9890
	City or town, state, and ZIP code PHOENIXVILLE, PA 19460		C If exemption application is pending, check here <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		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 42,316,986. (Part I, column (d) must be on cash basis)		J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
			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)
Revenue	1 Contributions, gifts, grants, etc., received	74,840.		N/A	
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	1,147,284.	1,147,284.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-827,331.			
	b Gross sales price for all assets on line 6a	13,816,322.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	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	197.	0.		STATEMENT 1	
12 Total Add lines 1 through 11	394,990.	1,147,284.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	188,970.	37,794.		151,176.
	14 Other employee salaries and wages	128,951.	25,790.		103,161.
	15 Pension plans, employee benefits	79,626.	15,925.		63,701.
	16a Legal fees STMT 2	20,062.	4,012.		16,050.
	b Accounting fees STMT 3	32,075.	6,415.		25,660.
	c Other professional fees STMT 4	16,426.	3,285.		13,141.
	17 Interest				
	18 Taxes STMT 5	31,972.	6,395.		25,577.
	19 Depreciation and depletion	24,660.	4,932.		
	20 Occupancy	56,245.	11,249.		44,996.
	21 Travel, conferences, and meetings	2,001.	400.		1,601.
	22 Printing and publications	4,182.	836.		3,346.
	23 Other expenses STMT 6	129,810.	63,627.		66,183.
	24 Total operating and administrative expenses. Add lines 13 through 23	714,980.	180,660.		514,592.
	25 Contributions, gifts, grants paid	1,945,315.			1,675,890.
26 Total expenses and disbursements. Add lines 24 and 25	2,660,295.	180,660.		2,190,482.	
27 Subtract line 26 from line 12	-2,265,305.				
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)		966,624.			
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	388,975.	326,856.	326,856.
	2 Savings and temporary cash investments			
	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	16,769.	9,150.	9,150.
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 8	23,382,311.	25,739,721.	25,739,721.
	c Investments - corporate bonds STMT 9	12,575,573.	13,217,990.	13,217,990.
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment; basis ▶ 898,838.			
	Less: accumulated depreciation STMT 10 ▶ 126,069.	68,814.	772,769.	772,769.
	15 Other assets (describe ▶ STATEMENT 11)	1,928,041.	1,134,019.	2,250,500.
	16 Total assets (to be completed by all filers)	38,360,483.	41,200,505.	42,316,986.
	17 Accounts payable and accrued expenses	13,322.	20,731.	
	18 Grants payable	95,000.	364,500.	
	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)	108,322.	385,231.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	36,819,113.	39,529,968.	
	25 Temporarily restricted			
	26 Permanently restricted	1,433,048.	1,285,306.	
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> 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	38,252,161.	40,815,274.	
	31 Total liabilities and net assets/fund balances	38,360,483.	41,200,505.	

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	38,252,161.
2	Enter amount from Part I, line 27a	2	-2,265,305.
3	Other increases not included in line 2 (itemize) ▶ INCREASE IN FMV OF SECURITIES	3	4,907,440.
4	Add lines 1, 2, and 3	4	40,894,296.
5	Decreases not included in line 2 (itemize) ▶ INCOME FROM SUBSIDIARY - UNREALIZED	5	79,022.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	40,815,274.

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 SEE ATTACHED SHEET		P		
b SEE ATTACHED SHEET		P		
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 13,396,787.		14,276,493.	-879,706.
b 419,535.		367,160.	52,375.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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	
a			-879,706.
b			52,375.
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	-827,331.
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	2,786,523.	40,324,051.	.069103
2007	3,126,836.	51,328,836.	.060918
2006	2,457,039.	53,347,642.	.046057
2005	2,753,026.	49,683,113.	.055412
2004	1,783,254.	45,407,953.	.039272

2 Total of line 1, column (d)	2	.270762
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	.054152
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	42,821,222.
5 Multiply line 4 by line 3	5	2,318,855.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	9,666.
7 Add lines 5 and 6	7	2,328,521.
8 Enter qualifying distributions from Part XII, line 4	8	2,190,482.

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 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 type="checkbox"/> and enter 1% of Part I, line 27b		1	19,332.
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	19,332.
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	19,332.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	36,107.	
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	36,107.	
8 Enter any penalty for underpayment of estimated tax. Check here <input 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	16,775.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input 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
1b 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 type="checkbox"/> \$ 0. (2) On foundation managers. <input 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 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 type="checkbox"/> PA		
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

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>WWW.PCHF1.ORG</u>	13	X	
14	The books are in care of ► <u>LOUIS J. BECCARIA, PHD</u> Telephone no. ► <u>610-917-9890</u> Located at ► <u>821 GAY STREET, PHOENIXVILLE, PA</u> ZIP+4 ► <u>19460</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			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 type="checkbox"/> Yes <input checked="" 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	N/A	1b
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 ► _____		
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. ► _____		
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)?

5b

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?

SEE STATEMENT 13

☒ 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
SEE STATEMENT 12		149,616.	14,290.	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 VIII**Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3** Five highest-paid independent contractors for professional services. 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**

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	39,506,336.
b Average of monthly cash balances	1b	342,258.
c Fair market value of all other assets	1c	3,624,728.
d Total (add lines 1a, b, and c)	1d	43,473,322.
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	43,473,322.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	652,100.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	42,821,222.
6 Minimum investment return. Enter 5% of line 5	6	2,141,061.

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	2,141,061.
2a Tax on investment income for 2009 from Part VI, line 5	2a	19,332.
b Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c Add lines 2a and 2b	2c	19,332.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	2,121,729.
4 Recoveries of amounts treated as qualifying distributions	4	0.
5 Add lines 3 and 4	5	2,121,729.
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	2,121,729.

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	2,190,482.
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	2,190,482.
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	0.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	2,190,482.

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				2,121,729.
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				
b From 2005				
c From 2006				
d From 2007				521,686.
e From 2008				794,926.
f Total of lines 3a through e	1,316,612.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 2,190,482.				
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				2,121,729.
e Remaining amount distributed out of corpus	68,753.			
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	1,385,365.			
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	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	1,385,365.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				521,686.
d Excess from 2008				794,926.
e Excess from 2009				68,753.

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				
ACADEMIC SCHOLARSHIP GRANTS - SEE ATTACHED SCHEDULE	NONE			32,000.
CHAMPIONS OF THE COMMUNITY GRANTS - SEE ATTACHED SCHEDULE	NONE			8,000.
GENERAL GRANTS - SEE ATTACHED SCHEDULE	NONE			1606800.
HEALTH EDUCATION MINI-GRANT - SEE ATTACHED SCHEDULE	NONE			9,420.
MATCH CONTRIBUTION - SEE ATTACHED SCHEDULE	NONE			19,670.
Total			▶ 3a	1675890.
b Approved for future payment				
Total SEE STATEMENT 15			▶ 3b	364,500.

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

<p>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?</p> <p>a Transfers from the reporting foundation to a noncharitable exempt organization of:</p> <p>(1) Cash</p> <p>(2) Other assets</p> <p>b Other transactions:</p> <p>(1) Sales of assets to a noncharitable exempt organization</p> <p>(2) Purchases of assets from a noncharitable exempt organization</p> <p>(3) Rental of facilities, equipment, or other assets</p> <p>(4) Reimbursement arrangements</p> <p>(5) Loans or loan guarantees</p> <p>(6) Performance of services or membership or fundraising solicitations</p> <p>c Sharing of facilities, equipment, mailing lists, other assets, or paid employees</p> <p>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.</p>		Yes	No

[illegible]

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

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

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.

Sign Here

Signature of officer or trustee _____ Date 2/10/11 Title President

Date 7/1/01

Title

PRESIDENT / CEO

Preparer's signature	<i>Bruce E. ...</i>	Date	2/9/11	Check if self-employed	<input type="checkbox"/>	Preparer's identifying number	
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Date _____

2/9/11

Check if self- employed	
-------------------------------	--

Preparer's identifying number

Firm's name (or yours if self-employed), address, and ZIP code **KIMMEL, LORAH + ASSOCIATES CPA'S, LLP**
400 CRESSON BLVD., P.O. BOX 979
OAKS, PA 19456

Phone no. (610) 666-0450

Form **990-PF** (2009)

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, or 990-PF.

OMB No 1545-0047

2009

Name of the organization

Employer identification number

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION

23-2912035

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 foundationCheck 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 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).

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

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization

Employer identification number

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION

23-2912035

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	PHOENIXVILLE HOSPITAL MEDICAL STAFF 140 NUTT ROAD PHOENIXVILLE, PA 19460	\$ 8,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
2	PHOENIXVILLE HOSPITAL THRIFT SHOP 140 NUTT ROAD PHOENIXVILLE, PA 19460	\$ 12,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Name of organization

Employer identification number

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION

23-2912035

Part II Noncash Property (see instructions)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization

Employer identification number

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION**23-2912035**

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this information once. See instructions) ▶ \$

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

FORM 990-PF	OTHER INCOME		STATEMENT	1
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	
OTHER INCOME	197.	0.		
TOTAL TO FORM 990-PF, PART I, LINE 11	197.	0.		

FORM 990-PF	LEGAL FEES		STATEMENT	2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	20,062.	4,012.		16,050.
TO FM 990-PF, PG 1, LN 16A	20,062.	4,012.		16,050.

FORM 990-PF	ACCOUNTING FEES		STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	32,075.	6,415.		25,660.
TO FORM 990-PF, PG 1, LN 16B	32,075.	6,415.		25,660.

FORM 990-PF	OTHER PROFESSIONAL FEES		STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CONSULTING	13,971.	2,794.		11,177.
PAYROLL SERVICE	2,455.	491.		1,964.
TO FORM 990-PF, PG 1, LN 16C	16,426.	3,285.		13,141.

FORM 990-PF	TAXES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
PAYROLL TAXES	23,698.	4,740.		18,958.	
REAL ESTATE TAXES	8,274.	1,655.		6,619.	
TO FORM 990-PF, PG 1, LN 18	31,972.	6,395.		25,577.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
COMMUNITY RELATIONS	16,695.	3,339.		13,356.	
BANK FEES	130.	26.		104.	
DUES AND SUBSCRIPTIONS	1,452.	290.		1,162.	
INSURANCE	4,638.	928.		3,710.	
MEMBERSHIP DUES	2,032.	406.		1,626.	
OFFICE SUPPLIES	10,509.	2,102.		8,407.	
POSTAGE	4,183.	837.		3,346.	
PROGRAM SUPPORT (TV/WEBSITE)	3,748.	750.		2,998.	
STAFF DEVELOPMENT	763.	153.		610.	
TELEPHONE	5,385.	1,077.		4,308.	
TRUSTEE EDUCATION	2,854.	571.		2,283.	
UTILITIES	5,641.	1,128.		4,513.	
MISCELLANEOUS	1,870.	374.		1,496.	
ASSET MANAGEMENT FEES	47,079.	47,079.		0.	
TRASH, WATER, SEWER	493.	99.		394.	
SECURITY	240.	48.		192.	
PROGRAM EVALUATION	5,930.	1,186.		4,744.	
INTERNET	635.	127.		508.	
GRANT ANALYSIS	9,825.	1,965.		7,860.	
FACILITY EXPENSES	1,345.	269.		1,076.	
CLERICAL	90.	18.		72.	
ADOPT A FAMILY	4,273.	855.		3,418.	
TO FORM 990-PF, PG 1, LN 23	129,810.	63,627.		66,183.	

FOOTNOTES

STATEMENT 7

PART VII-A, LINE 11

NAME AND ADDRESS OF CONTROLLED ENTITY

CHES-MONT VALLEY VENTURES, INC.
824 MAIN STREET, SUITE 350
PHOENIXVILLE, PA 19460

EIN 23-2508198

THERE WERE NO TRANSFERS TO OR FROM THIS
CONTROLLED ENTITY DURING THE YEAR OUTSIDE
THE NORMAL COURSE OF BUSINESS TRANSACTIONS

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
VANGUARD-FOUNDATION	24,728,366.	24,728,366.
VANGUARD-SECOND CENTURY	1,011,355.	1,011,355.
TOTAL TO FORM 990-PF, PART II, LINE 10B	25,739,721.	25,739,721.

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
VANGUARD-FOUNDATION	12,699,761.	12,699,761.
VANGUARD-SECOND CENTURY	518,229.	518,229.
TOTAL TO FORM 990-PF, PART II, LINE 10C	13,217,990.	13,217,990.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	10
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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
FURNITURE & FIXTURES	167,531.	117,503.	50,028.
LEASEHOLD IMPROVEMENTS	2,692.	448.	2,244.
LATERAL FILES	1,866.	187.	1,679.
LAPTOP OVERHEAD PROJECTOR	1,749.	175.	1,574.
LAND	120,000.	0.	120,000.
BUILDING	605,000.	7,756.	597,244.
TOTAL TO FM 990-PF, PART II, LN 14	898,838.	126,069.	772,769.

FORM 990-PF	OTHER ASSETS		STATEMENT 11
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
INVESTMENT IN SUBSIDIARY	1,928,041.	1,134,019.	2,250,500.
TO FORM 990-PF, PART II, LINE 15	1,928,041.	1,134,019.	2,250,500.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT 12
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
LOUIS J. BECCARIA C/O PCHF	PRESIDENT 40.00	149,616.	14,290.	0.
AMY BARTO C/O PCHF	CHAIRPERSON 0.00	0.	0.	0.
FRANK CIRONE C/O PCHF	VICE CHAIRMAN 0.00	0.	0.	0.
KAREN COLDWELL C/O PCHF	SECRETARY 0.00	0.	0.	0.
EUBANK TRAVIS-BEY C/O PCHF	TREASURER 0.00	0.	0.	0.
SEE ATTACHED LIST FOR DIRECTORS	0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		149,616.	14,290.	0.

FORM 990-PF

EXPENDITURE RESPONSIBILITY STATEMENT
PART VII-B, LINE 5C

STATEMENT 13

GRANTEE'S NAME

PHOENIXVILLE HEALTHCARE ACCESS FOUNDATION

GRANTEE'S ADDRESS723 WHEATLAND STREET
PHOENIXVILLE, PA 19460GRANT AMOUNT

670,000.

DATE OF GRANT

07/15/09

AMOUNT EXPENDED

353,000.

PURPOSE OF GRANT

DENTAL, VISION, AND PRESCRIPTION ASSISTANCE PROGRAMS

DATES OF REPORTS BY GRANTEE

1/15/10, 7/20/10, 8/19/09, 11/11/09, 3/22/10, 5/13/10

ANY DIVERSION BY GRANTEE

NO

GRANTEE'S NAME

PHOENIXVILLE HEALTHCARE ACCESS FOUNDATION

GRANTEE'S ADDRESS723 WHEATLAND STREET
PHOENIXVILLE, PA 19460

<u>GRANT AMOUNT</u>	<u>DATE OF GRANT</u>	<u>AMOUNT EXPENDED</u>
690,000.	07/08/08	50,000.

PURPOSE OF GRANT

DENTAL, VISION, AND PRESCRIPTION ASSISTANCE PROGRAMS

DATES OF REPORTS BY GRANTEE

8/19/09,11/11/09

ANY DIVERSION BY GRANTEE

NO

FORM 990-PF

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

STATEMENT 14

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

CAROL POINIER
821 GAY STREET
PHOENIXVILLE, PA 19460

TELEPHONE NUMBER

610-917-9890

FORM AND CONTENT OF APPLICATIONS

THE FOUNDATION HAS DEVELOPED A GRANT REQUEST FORM WHICH MAY BE REQUESTED OR
DOWNLOADED FROM THE INTERNET.

ANY SUBMISSION DEADLINES

GRANT REQUESTS MUST BE RECEIVED AT LEAST SIX WEEKS PRIOR TO SCHEDULED GRANT
MAKING MEETINGS, WHICH GENERALLY ARE IN JAN, APRIL, JULY & SEPT.

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE FOUNDATION SERVES 501(C)(3) ORGANIZATIONS/PUBLIC CHARITIES WHICH
SUPPORT COMMUNITY OR PERSONAL HEALTH AND IS LIMITED TO 19 MUNICIPALITIES IN
THE GREATER PHOENIXVILLE AREA.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
APPROVED FOR FUTURE PAYMENT

STATEMENT 15

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
GIVE & TAKE OUTREACH/LIMERICK CORNERSTONE FAMILY CHURCH OF THE NAZARENE - P.O. BOX 935 ROYERSFORD, PA 19468	NONE PROGRAM SUPPORT		5,000.
GOOD SAMARITAN SHELTER, INC. P.O. BOX 551 PHOENIXVILLE, PA 19460	NONE PROGRAM SUPPORT		10,000.
HEALTH CARE ACCESS 32 GAY STREET PHOENIXVILLE, PA 19460	NONE DENTAL, VISION & PRESCRIPTION ASSISTANCE PROGRAMS		317,000.
PHOENIXVILLE COMMUNITY EDUC FDN FOR PHOENIXVILLE COMMUNITIES THAT CARE - 120 MAIN STREET PHOENIXVILLE, PA 19460	NONE PROGRAM SUPPORT		15,000.
SPRING FORD COUNSELING SERVICES 201 NORTH 4TH AVE, SUITE 101 ROYERSFORD , PA 19468	NONE OPERATING, PROGRAM, EQUIPMENT, SUPPLIES		2,500.
MOM'S HOUSE OF GREATER PHILADELPHIA 152 CHURCH STREET PHOENIXVILLE, PA 19460	NONE GENERAL OPERATING SUPPORT		5,000.
STEPPING STONE EDUCATION CENTER 400 FRANKLIN AVE, SUITE 400 PHOENIXVILLE, PA 19460	NONE GENERAL OPERATING SUPPORT		10,000.
TOTAL TO FORM 990-PF, PART XV, LINE 3B			364,500.

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
MAJOR GRANTS - CASH VERSION
July 1, 2009 - June 30, 2010

	Grantee		Grant Purpose	Amount of Grant(s) Paid
4/15/2010	Arc of Chester County	900 Lawrence Drive West Chester, PA	Nursing support and services (\$7,500) and autism services (\$2,500)	10,000
4/15/2010	Association for the Colonial Theatre	227 Bridge Street Phoenixville, PA	Purchase AED equipment and train staff (\$2,500) and health slides (\$2,500)	5,000
4/15/2010	Astral Artists	230 S. Broad Street Phila., PA	Community Classics program	8,000
10/15/2009	Baptist Church of Phoenixville	Penn & South Streets Phoenixville, PA	Joyful Servants Food Pantry	5,000
10/15/2009	BCS YES/Baptist Children's Services	588 North Gulph Road King of Prussia, PA	Health, fitness and nutrition program	5,000
10/15/2009	Bryn Mawr Rehabilitation Hospital	414 Paoli Pike Malvern, PA	Cruzin' not Boozin' program	4,000
10/15/2009	Camphill Village Kimberton Hills	PO Box 145 Kimberton, PA	Healthcare component of Aging in Community Program	12,000
10/15/2009	Center on Hearing and Deafness	139 West Market Street West Chester, PA	Community support program	5,000
10/15/2009	Chester County Cooperating Extension - Penn State University	601 Westtown Road West Chester, PA	Program support at Park Springs Apartments	10,000
10/15/2009	Chester County Food Bank	610 Westtown Road West Chester, PA	General operating support	10,000
6/28/2010	Chester County Food Bank	610 Westtown Road West Chester, PA	General operating support	25,000
7/28/2009	Chester County Futures	704 Haywood Drive Exton, PA	April 2009 matching grant	5,000
4/15/2010	Chester County Futures	704 Haywood Drive Exton, PA	General operating support for Phoenixville program	10,000
4/15/2010	Chester County Opportunities Industrialization Center	790 East Market Street West Chester, PA	CAN training (\$20,000) and Health Care Careers Prep Class (\$5,000)	25,000
10/15/2009	Citizen Advocacy of Chester County	205 Church Street Phoenixville, PA	General operating support	8,000

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
MAJOR GRANTS - CASH VERSION
July 1, 2009 - June 30, 2010

	Grantee		Grant Purpose	Amount of Grant(s) Paid
10/15/2009	Clinical Care Associates	250 King of Prussia Road Radnor, PA	Support for Cancer Center at Phoenixville Hospital	15,000
10/15/2009	Community Volunteers in Medicine	300B Lawrence Drive West Chester, PA	General operating support to provide services to Phoenixville area residents	15,000
4/15/2010	Congreso de Latinos Unidos, Inc.	216 West Somerset Street Phila., PA	Planning council	10,000
10/15/2009	Crime Victims Center of Chester County	PO Box 738 West Chester, PA	General operating support	30,000
10/15/2009	Daemion Counseling Center	PO Box 77 Berwyn, PA	General operating support	5,000
4/9/2010	Delaware County Community College Educational Foundation	901 S. Media Line Road Media, PA	CAT Awardee	1,000
4/15/2010	Delaware County Community College Educational Foundation	901 S. Media Line Road Media, PA	Scholarships for Phoenixville area students majoring in public safety or health related majors	25,000
4/15/2010	Delaware Valley Grantmakers	230 S. Broad Street Phila., PA	Operating support as a funding partner	6,000
3/5/2010	Doctors Without Borders	PO Box 5030 Hagerstown, MD		10,000
4/15/2010	Domestic Violence Center of Chester County	PO Box 832 West Chester, PA	Part -time counselor/advocate	30,000
4/15/2010	Dragonfly Forest, Inc.	1100 E. Hector Street Conshohocken, PA	Summer camp for children with serious illnesses	7,500
7/15/2009	Family Service of Chester County	310 North Matlack Street West Chester, PA	Phoenixville Incentive for Endowment Grant	25,000
4/15/2010	Family Service of Chester County	310 North Matlack Street West Chester, PA	General operating support	30,000
12/21/2009	Fellowship Health Resources	723 Wheatland Street Phoenixville, PA	Support for outpatient care subsidies and Neil's Place	15,000

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
MAJOR GRANTS - CASH VERSION
July 1, 2009 - June 30, 2010

	Grantee		Grant Purpose	Amount of Grant(s) Paid
4/15/2010	Fellowship Health Resources	723 Wheatland Street Phoenixville, PA	Over the Hump Fund (\$10,000) and Director of Development position (\$20,000)	30,000
10/15/2009	Gateway Employment Resources	342 West Ridge Pike Limerick, PA	Employment training and services for the disabled	5,000
4/15/2010	Gateway Employment Resources	342 West Ridge Pike Limerick, PA	General operating support (\$5,000) and computer upgrades and staff training (\$3,000)	8,000
4/15/2010	Good Samaritan Shelter, Inc.	PO Box 514 Phoenixville, PA	General operating support	7,500
4/15/2010	Good Works, Inc.	PO Box 1441 Coatesville, PA	General operating support	10,000
10/15/2009	Grantmakers In Health	1100 Connecticut Ave., NW Washington, DC	Operating support as a funding partner	2,500
10/15/2009	Handi-Crafters, Inc.	PO Box 72646 Thorndale, PA	Vocational rehabilitation workshop	5,000
4/15/2010	Holcomb Behavioral Health Systems	930 East Lancaster Ave. Exton, PA	Life Skills program	7,500
7/23/2009	Hope Springs Equestrian Therapy	PO Box 156 Chester Springs, PA	January 2009 matching grant	5,000
4/15/2010	Kelly Anne Dolan Memorial Fund	PO Box 556 Ambler, PA	Outreach and services for families from the Foundation's service area	2,000
11/28/2009	Little Angels Day Care	PO Box 172 Phoenixville, PA	September 2008 matching grant	5,000
4/15/2010	Ludwig's Corner Fire Company	1325 Pottstown Pike Glenmoore, PA	Training material for fire fighters	5,000
10/15/2009	Maternal and Child Health Consortium	30 West Barnard Street West Chester, PA	Phoenixville Prenatal Services program and Healthy Start program	50,000
4/15/2010	Meals on Wheels of Chester County, Inc.	510 East Barnard Street West Chester, PA	Program operation funding	5,000

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
MAJOR GRANTS - CASH VERSION
July 1, 2009 - June 30, 2010

	Grantee		Grant Purpose	Amount of Grant(s) Paid
4/15/2010	Mental Health Association of Southeastern Pennsylvania	1211 Chestnut Street Phila., PA	Compeer outreach	5,000
11/6/2009	Mom's House	152 Church Street Phoenixville, PA	April 2009 matching grant	5,000
4/15/2010	Mom's House	152 Church Street Phoenixville, PA	Program expansion	5,000
10/15/2009	NAMI PA Chester County Chapter - Housing Committee	PO Box 2732 West Chester, PA	General operating support	10,000
10/15/2009	Open Hearth	101 North Main Street Spring City, PA	General operating support	40,000
4/15/2010	Open Hearth, Inc.	101 North Main Street Spring City, PA	Development and production of The Help Book III	73,100
4/15/2010	Open Hearth, Inc.	101 North Main Street Spring City, PA	The Gateway Program	7,500
10/15/2009	Orion Communities, Inc.	3034 Merlin Road Chester Springs, PA	General operating support	15,000
10/15/2009	Phoenixville Area Communities That Care	123 South Main Street Phoenixville, PA	General operating support	13,000
4/15/2010	Phoenixville Area Community Services	257 Church Street Phoenixville, PA	General operating support (\$30,000) and aid for clients (\$20,000)	50,000
4/15/2010	Phoenixville Area Police Athletic League	PO Box 221 Phoenixville, PA	General operating support	12,000
7/30/2009	Phoenixville Area Positive Alternatives	181 Bridge Street Phoenixville, PA	In memory of John Messina	250
10/15/2009	Phoenixville Area Positive Alternatives	181 Bridge Street Phoenixville, PA	General operating support and SAFE and Move Ahead program support	10,000
4/9/2010	Phoenixville Area Positive Alternatives	181 Bridge Street Phoenixville, PA	October 2009 match grant	10,000
4/15/2010	Phoenixville Borough Police Department	140 Church Street Phoenixville, PA	Purchase wall padding, TV monitor, and Nikon total station	10,000

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
MAJOR GRANTS - CASH VERSION
July 1, 2009 - June 30, 2010

	Grantee		Grant Purpose	Amount of Grant(s) Paid
10/15/2009	Phoenixville Community Education Foundation	120 Main Street Phoenixville, PA	Youth & Philanthropy program and mental health specialist initiative	30,000
4/15/2010	Phoenixville Community Education Foundation	120 Main Street Phoenixville, PA	Operating F.O.C.U.S.	1,000
7/15/2009	Phoenixville Healthcare Access Foundation	723 Wheatland Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	50,000
8/4/2009	Phoenixville Healthcare Access Foundation	723 Wheatland Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	25,000
8/19/2009	Phoenixville Healthcare Access Foundation	723 Wheatland Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	25,000
9/14/2009	Phoenixville Healthcare Access Foundation	723 Wheatland Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	50,000
11/13/2009	Phoenixville Healthcare Access Foundation	723 Wheatland Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	50,000
1/7/2010	Phoenixville Healthcare Access Foundation	723 Wheatland Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	50,000
3/25/2010	Phoenixville Healthcare Access Foundation	723 Wheatland Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	50,000
5/6/2010	Phoenixville Healthcare Access Foundation	723 Wheatland Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	20,000
5/20/2010	Phoenixville Healthcare Access Foundation	723 Wheatland Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	50,000
6/15/2010	Phoenixville Healthcare Access Foundation	723 Wheatland Street Phoenixville, PA	Dental, Vision, and Prescription Assistance Programs	33,000
2/3/2010	Phoenixville Public Library	182 Second Avenue Phoenixville, PA	January 2010 grant	25,000
10/15/2009	Planned Parenthood of Southeastern PA	1144 Locust Street Phila., PA	Operating support for Phoenixville Health Center	20,000
4/15/2010	Pottstown Area Seniors' Center	310 North High Street Pottstown, PA	Part time health program	5,000

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
MAJOR GRANTS - CASH VERSION
July 1, 2009 - June 30, 2010

	Grantee		Grant Purpose	Amount of Grant(s) Paid
10/15/2009	Ronald McDonald House of Delaware	1901 Rockland Road Wilmington, DE	Adopt A Room support	3,000
4/15/2010	Royersford Outreach, Inc., aka Open Door	445 Washington Avenue Royersford, PA	General operating support for thrift shop and food pantry	10,000
4/15/2010	Sacred Heart Church	148 Church Street Phoenixville, PA	Wheelchair lift for community hall	7,500
10/15/2009	Schuylkill River Heritage Center at Phoenixville	2 North Main Street Phoenixville, PA	General operating support	5,000
4/15/2010	Southeastern PA Autism Resource Center	1160 McDermott Drive West Chester, PA	General operating support	8,000
10/15/2009	Spring Ford Counseling Services	210 North 4th Street Royersford, PA	Program support for Royersford Spring City areas	5,000
10/15/2009	Sr. Adult Activity Center of Phoenixville	153 Church Street Phoenixville, PA	General operating support	10,000
5/20/2010	Sr. Adult Activity Center of Phoenixville	153 Church Street Phoenixville, PA	General operating support	5,000
4/15/2010	Stepping Stone Education Center of Phoenixville	400 Franklin Avenue Phoenixville, PA	General operating support	10,000
10/15/2009	The Clinic	143 Church Street Phoenixville, PA	General operating support	200,000
10/15/2009	Transportation Management Association of Chester County	707 Eagleview Blvd. Exton, PA	Ride for Health initiative	51,950
4/15/2010	Triskeles Foundation	PO Box 609 Worcester, PA	Food for Thought program	5,000
10/15/2009	Variety - The Children's Charity	PO Box 609 Worcester, PA	After school and summer school program for children with disabilities	10,000
4/15/2010	Wings for Success	PO Box 3331 West Chester, PA	General operating support	2,500
10/15/2009	Women's Resource Center	PO Box 596 Wayne, PA	Single mothers' program	5,000
				1,606,800

**PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
CHAMPIONS OF THE COMMUNITY GRANT LIST
7/1/09-6/30/10**

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
The Clinic 		At request of Rev. Marie Swayze - _Champion of the Community Awardee	None	11/13/09	2,000
Open Hearth	101 North Main Street Spring City, PA	At request of Chuck Benz - Champion of the Community Awardee	None	11/13/09	2,000
Mental Health Asspciation of Southeastern PA – Compeer Outreach		At request of L Hessenbacher - _Champion of the Community Awardee	None	11/13/09	2,000
St. Mary's Franciscan Shelter	209 Emmett Street Phoenixville, PA	At request of Kathy Spohn - Champion of the Community Awardee	None	11/13/09	2,000
					8,000

Audit ... Grant List Champions 2009 2010

**PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
HEALTH EDUCATION MINI-GRANT LIST
7/1/09-6/30/10**

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
Barkley Elementary School	320 Second Avenue Phoenixville, PA	Health education mini grant - support for health education program	None	9/24/09 #2699	300
Barkley Elementary School	320 Second Avenue Phoenixville, PA	Health education mini grant - support for health education program – Girls on the Run program	None	12/9/09 #2766	400
Kimberton Fire Company	61 Firehouse Lane Kimberton, PA	Health education mini grant - support for health education program – Iamresponding com initiative	None	5/27/10 #2836	500
Ludwig's Corner Fire Company	1325 Pottstown Pike Glenmoore, PA	Health education mini grant - support for health education program	None	9/22/09 #2714	500
Mom's House	152 Church Street Phoenixville, PA	Health education mini grant - support for nutrition and healthy lifestyles program	None	6/29/10 #2847	440
Owen J Roberts School District	901 Ridge Road Pottstown, PA	Health education mini grant - support for health education program - TATU program - anti tobacco message	None	11/18/09 #2758	500
Phoenixville Area High School	1200 Gay Street Phoenixville, PA	Health education mini grant - support for health education program – motivational media assemblies	None	11/13/09 #2754	500
Phoenixville Area Middle School	1330 South Main Street Phoenixville, PA	Health education mini grant - support for health education program – TATU program - anti tobacco message	None	8/4/09 #2706	500
Phoenixville Area Middle School	1330 South Main Street Phoenixville, PA	Health education mini grant - support for health education program – Kids with Courage initiative	None	6/9/10 #2839	280
Phoenixville Area School District	Kindergarten Center 100 School Lane Phoenixville, PA	Health education mini grant - support for health education program – Camp Jump Start initiative	None	5/11/10 #2826	500
Phoenixville Area School District	PO Box 809 Phoenixville, PA	Health education mini grant - support for health education program – Girls on the Run program in East Pikeland Elementary School	None	2/5/10 #2779	500
Phoenixville Area School District	PO Box 809 Phoenixville, PA	Health education mini grant - support for health education program – Girls on the Run program in Phoenixville Area Middle School	None	2/5/10 #2780	500

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
Phoenixville Area School District	PO Box 809 Phoenixville, PA	Health education mini grant - support for health education program – Girls on the Run program in Schuylkill Elementary School	None	2/5/10 #2778	500
Phoenixville Area School District	PO Box 809 Phoenixville, PA	Health education mini grant - support for health education program – TATU program – anti tobacco message	None	1/20/10 #2776	500
Phoenixville Fire Department	Phoenix Hose Hook & Ladder 177 Church Street Phoenixville	Health education mini grant - support for health education program		9/24/09 #2715	500
Pottsgrove Middle School	1351 North Hanover St. Pottstown, PA	Health education mini grant - support for health education program – Speedminton initiative	None	6/9/10 #2840	500
Schuylkill Elementary School	290 S. Whitehorse Road Phoenixville, PA	Health education mini grant - support for health education program – structured recess activities	None	8/19/09 #2710	500
Spring Ford Counseling Services	201 North 4 th Avenue Royersford, PA	Health education mini grant - support for health education program – drug and alcohol awareness program	None	2/12/10 #2782	500
Stepping Stone Education Center	400 Franklin Ave. Phoenixville, PA	Health education mini grant - support for health education program- healthy cooking day initiative	None	12/9/09 #2767	500
Triskeles	707 Eagleview Blvd. Exton, PA	Health education mini grant - support for health education program – Cloud Institute curriculum	None	2/23/10 #2784	500
					9,420

Audit ... Grant list mini 2009 2010

**PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
SCHOLARSHIP GRANT LIST
7/1/09 – 6/30/10**

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
Brady, Mary Kate	2101 Fort Bevon Road Harleysville, PA 19438	Academic Scholarship	None	8/6/09	1,000
Brady, Mary Kate	2101 Fort Bevon Road Harleysville, PA 19438	Academic Scholarship	None	1/19/10	1,000
Carns, Christina	209 Morris Street Phoenixville, PA 19460	Academic Scholarship	None	7/30/09	1,000
Carns, Christina	209 Morris Street Phoenixville, PA 19460	Academic Scholarship	None	1/11/10	1,000
Curran, Katharine Elizabeth	51 Church Road Malvern, PA 19355	Academic Scholarship	None	7/29/09	1,000
Curran, Katharine Elizabeth	51 Church Road Malvern, PA 19355	Academic Scholarship	None	1/8/10	1,000
Douglas, Scott R.	2647 Amy Drive Eagleville, PA 19403	Academic Scholarship	None	1/8/10	1,000
Douglas, Scott R.	2647 Amy Drive Eagleville, PA 19403	Academic Scholarship	None	6/28/10	1,000
Elliott, Emily	657 Old Schuylkill Road Pottstown, PA 19465	Academic Scholarship	None	8/4/09	1,000
Elliott, Emily	657 Old Schuylkill Road Pottstown, PA 19465	Academic Scholarship	None	1/12/10	1,000
Fuga, Stephanie N.	1014 Riverwalk Drive Phoenixville, PA 19460	Academic Scholarship	None	8/20/09	1,000
Giraldi, Arianna Marie	145 Buckwalter Road Royersford, PA 19465	Academic Scholarship	None	7/21/09	1,000
Guest, Bradley	1197 Prizer Road Pottstown, PA 19465	Academic Scholarship	None	2/12/10	1,000
Himes, Brooke	1231 Harrison Avenue Phoenixville, PA 19460	Academic Scholarship	None	12/11/09	1,000
Himes, Brooke	1231 Harrison Avenue Phoenixville, PA 19460	Academic Scholarship	None	1/11/10	1,000
Kovach, Staci	61 Cedarwood Lane Phoenixville, PA 19460	Academic Scholarship	None	8/20/09	1,000
Kovach, Staci	61 Cedarwood Lane Phoenixville, PA 19460	Academic Scholarship	None	1/8/10	1,000
Kronmuller, Danielle	78 Ridge Road Phoenixville, PA	Academic Scholarship	None	9/10/09	1,000
Kronmuller, Danielle	78 Ridge Road Phoenixville, PA	Academic Scholarship	None	1/26/10	1,000
Kuhn, Nicole	489 Delores Drive Collegeville, PA	Academic Scholarship	None	2/3/10	1,000
Moyer, Jeffrey Alan	3728 Stoughton Road Collegeville, PA 19426	Academic Scholarship	None	7/23/09	1,000
Sadofsky, Sarah	423 St. Ann Circle Phoenixville, PA 19460	Academic Scholarship	None	7/21/09	1,000
Scott, Jessie	141 Maryhill Road Phoenixville, PA 19460	Academic Scholarship	None	8/20/09	1,000
Scott, Jessie	141 Maryhill Road Phoenixville, PA 19460	Academic Scholarship	None	1/8/10	1,000
Shultz, Kelsey	PO Box 241 Parkerford, PA 19457	Academic Scholarship	None	9/9/09	1,000
Shultz, Kelsey	PO Box 241 Parkerford, PA 19457	Academic Scholarship	None	11/30/09	1,000

Grantee's Name	Grantee's Address	Classification	Relationship	Date Paid	Amount of Grant
Shultz, Kelsey	PO Box 241 Parkerford, PA 19457	Academic Scholarship	None	1/19/10	1,000
VanBuskirk, Elizabeth	1687 Rupert Road Pottstown, PA 19464	Academic Scholarship	None	7/21/09	1,000
VanBuskirk, Elizabeth	1687 Rupert Road Pottstown, PA 19464	Academic Scholarship	None	1/11/10	1,000
Ujobai, Lauren A.	161 Stine Drive Collegeville, PA 19426	Academic Scholarship	None	12/11/09	1,000
Ujobai, Lauren A.	161 Stine Drive Collegeville, PA 19426	Academic Scholarship	None	1/11/10	1,000
Ujobai, Lauren A.	161 Stine Drive Collegeville, PA 19426	Academic Scholarship	None	6/8/10	1,000
Total Academic Scholarship Grants					32,000

Audit File... Grant list scholarships 2009 2010

PHOENIXVILLE COMMUNITY HEALTH FOUNDATION
MATCH CONTRIBUTIONS
7/1/2009– 6/30/10

Date	Organization	Geographic Area	Match on behalf of Board/Staff Member	Dollar Amount
1/8/10	ACT / Colonial Theater	Phoenixville	Dick Kunsch	225
6/29/10	ACT / Colonial Theatre	Phoenixville	Dan Baer	35
7/23/09	Aid for Friends	Phila.	Lou Beccaria	50
10/19/09	Aid for Friends	Philadelphia	Lou Beccaria	50
9/24/09	American Cancer Society	West Chester	Lynn Hartman	60
11/30/09	Barkley Elementary School	Phoenixville	Lou Beccaria	200
12/17/09	Birthright	Phoenixville	Rich Downs	250
3/22/10	Brandywine Health Foundation	Coatesville	Carol Poinier	150
3/23/10	Brandywine Health Foundation	Coatesville	Jim Reading	250
11/17/09	Camphill Village Kimberton Hills	Kimberton	Lou Beccaria	100
5/20/10	Chester Co Hospital Fdn.	West Chester	Carol Poinier	50
12/17/09	Chester County Community Fdn.	West Chester	Dave Frees	50
8/17/09	Chester County Dept. of Human Services	West Chester	Lou Beccaria	200
5/20/10	Chester County Food Bank	Downingtown	Lou Beccaria	100
10/19/09	Chester County Futures	Exton	Lou Beccaria	50
12/21/09	Colonial Theatre	Phoenixville	Lou Beccaria	50
6/29/10	Community Development Corp.	Phoenixville	Robb Frees	250
11/16/09	Crime Victims Center	West Chester	Carol Poinier	100
3/5/10	Domestic Violence Center of Chester County	West Chester	Lou Beccaria	50
8/20/09	Family Service of Chester County	West Chester	Lou Beccaria	50
7/10/09	Fellowship Health Resources	Lincoln, RI	Dan Baer	25
7/23/09	Fellowship Health Resources	Lincoln, RI	Lou Beccaria	50
12/9/09	Fellowship Health Resources	Phoenixville	Lou Beccaria	50
12/9/09	Fellowship Health Resources	Phoenixville	Lynn Hartman	50
8/4/09	Freedom Valley YMCA	West Norriton	Robb Frees	1250
12/2/09	Freedom Valley YMCA	West Norriton	Dave Frees	1,000
2/12/10	Freedom Valley YMCA	West Norriton	Amy Barto	500
3/11/10	Freedom Valley YMCA	West Norriton	Dick Kunsch	500
3/19/10	Freedom Valley YMCA	West Norriton	Dan Baer	250
4/20/10	Freedom Valley YMCA	West Norriton	Jim Reading	500
6/29/10	Freedom Valley YMCA	West Norriton	Robb Frees	200
4/9/10	Friends of the Phoenixville Library	Phoenixville	Lou Beccaria	50
4/9/10	Friends of the Phoenixville Library	Phoenixville	Dan Baer	25
12/2/09	Friends of Troop 78 BSA	Phoenixville	Dave Frees	100
7/15/09	Good Samaritan Shelter	Phoenixville	Lou Beccaria	50
7/23/09	Good Samaritan Shelter	Phoenixville	Lou Beccaria	50
11/6/09	Good Samaritan Shelter	Phoenixville	Lou Beccaria	50
5/20/10	Good Works	Coatesville	Carol Poinier	50
2/3/10	Green Valleys Association	Pottstown	Dick Kunsch	105
1/11/10	Grimes AME Church	Phoenixville	Dan Baer	25
5/20/10	Gundaker	Phoenixville	Lynn Hartman	100
7/15/09	Gundaker Foundation	Coatesville	Lynn Hartman	100
3/19/10	Historical of Phoenixville	Phoenixville	Dan Baer	25
7/24/09	Historical Society of Phoenixville	Phoenixville	Dick Kunsch	75
11/5/09	Historical Society of Phoenixville	Phoenixville	Robb Frees	50
11/6/09	Historical Society of Phoenixville	Phoenixville	Lou Beccaria	50
12/10/09	Historical Society of Phoenixville	Phoenixville	Dick Kunsch	100
12/21/09	Historical Society of Phoenixville	Phoenixville	Lynn Hartman	35
12/2/09	HSPA	Phoenixville	Dave Frees	1,000

Date	Organization	Geographic Area	Match on behalf of Board/Staff Member	Dollar Amount
12/21/09	Kelly Anne Dolan Mem. Fund	Ambler	Lou Beccaria	50
1/29/10	Kiwanis	Phoenixville	Amy Barto	50
12/21/09	Laurel House	Norristown	Frank Cirone	750
12/28/09	Legal Aid of SE PA	West Chester	Ron Brien	250
2/25/10	Lutheran Disaster Relief – Haiti	Haiti	Cindy Krommes	200
4/22/10	March of Dimes	Downingtown	Carol Poinier	100
7/23/09	Maternal and Child Health Consortium	West Chester	Lou Beccaria	50
7/23/09	Mom's House	Phoenixville	Lou Beccaria	50
7/8/09	NAMI PA	Harrisburg	Lou Beccaria	50
3/25/10	Operation FOCUS	Phoenixville	Jim Reading	100
7/8/09	Orion Communities, Inc.	Phoenixville	Robb Frees	125
10/19/09	PANO	Harrisburg	Lou Beccaria	120
8/3/09	PAPA	Phoenixville	Amy Barto	50
8/4/09	PAPA	Phoenixville	Robb Frees	125
9/2/09	PASD	Phoenixville	Lynn Hartman	100
9/30/09	Phoenix Hose Hook & Ladder	Phoenixville	Amy Barto	50
3/11/10	Phoenix Hose Hook & Ladder	Phoenixville	Amy Barto	50
12/21/09	Phoenixville Area Children's Learning Center	Phoenixville	Frank Cirone	250
12/21/09	Phoenixville Area Community Services	Phoenixville	Dan Baer	25
12/23/09	Phoenixville Area Community Services	Phoenixville	Robb Frees	125
1/8/10	Phoenixville Area Community Services	Phoenixville	Dick Kunsch	100
4/29/10	Phoenixville Area Community Services	Phoenixville	Dan Baer	25
6/2/10	Phoenixville Area Community Services	Phoenixville	Dick Kunsch	100
8/14/09	Phoenixville Area Positive Alternatives	Phoenixville	Lou Beccaria	50
8/25/09	Phoenixville Area Positive Alternatives	Phoenixville	Marian Moskowitz	500
9/9/09	Phoenixville Area Positive Alternatives	Phoenixville	Lynn Hartman	50
12/21/09	Phoenixville Area Positive Alternatives	Phoenixville	Frank Cirone	450
4/29/10	Phoenixville Area Senior Center	Phoenixville	Dave Frees	100
6/29/10	Phoenixville Area Time Bank	Phoenixville	Dan Baer	25
9/2/09	Phoenixville Community Education Fdn.	Phoenixville	James Reading	250
6/29/10	Phoenixville Community Education Fdn.	Phoenixville	Robb Frees	500
7/24/09	Phoenixville Healthcare Access Fdn.	Phoenixville	Dick Kunsch	500
11/16/09	Phoenixville Healthcare Access Fdn.	Phoenixville	Amy Barto	250
11/18/09	Phoenixville Healthcare Access Fdn.	Phoenixville	Dan Baer	25
12/2/09	Phoenixville Healthcare Access Fdn.	Phoenixville	Dave Frees	250
12/9/09	Phoenixville Healthcare Access Fdn.	Phoenixville	Lou Beccaria	100
12/9/09	Phoenixville Healthcare Access Fdn.	Phoenixville	Robb Frees	125
12/9/09	Phoenixville Healthcare Access Fdn.	Phoenixville	Frank Cirone	100
12/17/09	Phoenixville Healthcare Access Fdn.	Phoenixville	Tim Durkin	125
6/29/10	Phoenixville Healthcare Access Fdn.	Phoenixville	Robb Frees	250
11/13/09	Phoenixville Hospital Aux/Coalition	Phoenixville	James Reading	100
9/2/09	Phoenixville Hospital Auxiliary	Phoenixville	James Reading	125
9/9/09	Phoenixville Hospital Auxiliary	Phoenixville	Lynn Hartman	50
10/6/09	Phoenixville Public Library	Phoenixville	James Reading	250
11/30/09	Phoenixville Public Library	Phoenixville	Amy Barto	150
1/11/01	Phoenixville Public Library	Phoenixville	Dan Baer	25
2/3/10	Phoenixville Public Library	Phoenixville	Dick Kunsch	100
2/16/10	Phoenixville Public Library	Phoenixville	Lou Beccaria	50
6/2/10	Phoenixville Public Library	Phoenixville	Dick Kunsch	250
3/11/10	Phoenixville Regional Chamber of Commerce	Phoenixville	Jim Reading	150
10/27/09	Phoenixville YMCA	Phoenixville	Amy Barto	500
12/21/09	Salvation Army	Lehigh Vly	Lynn Hartman	50
4/9/10	Schuylkill River Heritage Center	Phoenixville	Dick Kunsch	100
1/8/10	Schuylkill Canal Association	Phoenixville	Dick Kunsch	100
8/20/09	Schuylkill River Heritage Center	Phoenixville	Lou Beccaria	50
10/6/09	Schuylkill River Heritage Center	Phoenixville	James Reading	50

Date	Organization	Geographic Area	Match on behalf of Board/Staff Member	Dollar Amount
3/19/10	Schuylkill River Heritage Center	Phoenixville	Dan Baer	25
3/19/10	Schuylkill River Heritage Center	Phoenixville	Lou Beccaria	50
11/4/09	Sr. Adult Activity Center	Phoenixville	Dick Kunsch	100
1/29/10	St. John's Lutheran Church – Haiti Relief	Haiti	Dave Frees	100
3/20/10	St. Mary's Franciscan Shelter	Phoenixville	Amy Barto	150
8/11/09	Stepping Stone Education Center	Phoenixville	Amy Barto	100
8/20/09	Stepping Stone Education Center	Phoenixville	Lou Beccaria	50
7/24/09	The Clinic	Phoenixville	Dick Kunsch	500
12/21/09	The Clinic	Phoenixville	Frank Cirone	100
12/21/09	The Clinic	Phoenixville	Dan Baer	25
6/8/10	Torah Fund	Phoenixville	Dan Baer	90
12/21/09	Young Life	West Chester	Frank Cirone	1,000
				19,670

Date	Vanguard Mutual	Fund #	Shares sold	Price/share	total price	Cost Basis	Real Gain(loss)
07.31.09	Total Bond Market Index Fund Institutional Shares	222	39,289	10.28	403.89	398.75	5,14092
10.31.09	Primecap Fund Admiral Shares	559	184,357	55.87	10,300.03	10,317.65	-17,62441
10.30.09	Total Stock Market Index Fund Institutional Shares	855	314,589	25.43	8,000.00	7,210.16	789,83827
10.30.09	Total Stock Market Index Fund Institutional Shares	855	629,178	25.43	16,000.00	14,420.32	1579,67654
10.30.09	Windsor II Fund Admiral Shares	573	304,105	39.46	11,999.98	14,285.79	-2285,8067
11.30.09	Total Bond Market Index Fund Institutional Shares	222	42,146	10.56	445.06	427.91	17,15176
01.29.10	Inflation Protected Securities Fund Admiral Shares	5119	615,262	25.03	15,400.01	15,287.78	112,22786
01.28.10	Total Bond Market Index Fund Institutional Shares	222	44,055	10.46	460.82	447.32	13,4953
01.05.10	Total International Stock Index Fund	113	23889.93	14.82	354,048.79	301,080.97	52967,82224
03.31.10	REIT					851.71	-851.71
04.30.10	Inflation Protected Securities Fund Admiral Shares	5119	79,271	25.23	2,000.01	1,969.53	30,47733
04.29.10	Total Bond Market Index Fund Institutional Shares	222	45,442	10.48	476.23	461.53	14,70216
							0
					<u>419,534.81</u>	<u>367,159.42</u>	<u>52,375.39</u>

Date	Vanguard Mutual	Fund #	Shares sold	Price/shar	total price	Cost Basis	Real Gain(loss)
07 09 09	Intermediate Term Investment Grade	571	5,470.46	9.14	50,000.00	51,823.33	(1,823.33)
07 31 09	Total Bond Market Index Fund Institu	222	1,015.24	10.28	10,436.63	10,315.20	121.43
07 29 09	Explorer Fund Admiral Shares	5024	322.23	46.55	14,999.99	18,749.06	(3,749.07)
07 29 09	Total International Stock Index Fund	113	2,745.10	12.75	35,000.00	43,190.27	(8,190.27)
08 13 09	Explorer Fund Admiral Shares	5024	82.90	48.25	4,000.02	4,823.62	(823.60)
08 13 09	Total International Stock Index Fund	113	3,720.24	13.44	50,000.00	58,532.74	(8,532.74)
08 13 09	Total International Stock Index Fund	113	2,827.38	13.44	38,000.00	44,484.88	(6,484.88)
08 13 09	Windsor II Fund Admiral Shares	573	261.71	38.21	10,000.02	12,824.23	(2,824.21)
08 13 09	Windsor II Fund Admiral Shares	573	209.37	38.21	7,999.99	10,259.35	(2,259.36)
09 09 09	Total International Stock Index Fund	113	3,563.79	14.03	50,000.00	56,071.28	(6,071.28)
09 09 09	Total International Stock Index Fund	113	7,127.58	14.03	100,000.00	112,142.56	(12,142.56)
10 30 09	Strategic Equity Fund	114	721.50	13.86	10,000.00	12,512.70	(2,512.70)
10 30 09	Strategic Equity Fund	114	721.50	13.86	10,000.00	12,512.70	(2,512.70)
10 27 09	Explorer Fund Admiral Shares	5024	259.02	50.19	13,000.01	15,070.74	(2,070.73)
10 30 09	Explorer Fund Admiral Shares	5024	705.25	48.21	34,000.01	41,034.57	(7,034.56)
10 30 09	Primecap Fund Admiral Shares	559	5,924.47	55.87	331,000.03	382,377.61	(51,377.58)
10 27 09	Total International Stock Index Fund	113	3,467.41	14.42	49,999.99	50,000.00	(0.01)
10 27 09	Total International Stock Index Fund	113	8,321.78	14.42	120,000.00	120,000.00	(0.00)
10 27 09	Total Stock Market Index Fund Instit	855	3,096.33	26.16	80,999.99	91,682.02	(10,682.03)
10 30 09	Total Stock Market Index Fund Instit	855	31,734.17	25.43	806,999.99	939,645.66	(132,645.67)
10 27 09	Windsor II Fund Admiral Shares	573	891.31	40.39	36,000.01	43,675.35	(7,675.34)
10 30 09	Windsor II Fund Admiral Shares	573	9,630.01	39.46	380,000.00	471,882.76	(91,882.76)
11 30 09	Total Bond Market Index Fund Institu	222	1,079.96	10.56	11,404.32	10,976.88	427.44
11 02 09	Strategic Equity Fund	114	1,866.48	13.93	26,000.00	32,369.53	(6,369.53)
11 10 09	Strategic Equity Fund	114	819.11	14.65	12,000.01	14,205.55	(2,205.54)
11 02 09	Explorer Fund Admiral Shares	5024	517.06	48.35	25,000.00	30,085.10	(5,085.10)
11 10 09	Explorer Fund Admiral Shares	5024	235.71	50.91	12,000.00	13,714.69	(1,714.69)
11 02 09	Primecap Fund Admiral Shares	559	1,070.47	56.05	60,000.01	69,090.58	(9,090.57)
11 10 09	Primecap Fund Admiral Shares	559	456.16	59.19	26,999.99	29,441.40	(2,441.41)
11 02 09	Total Stock Market Index Fund Instit	855	5,631.60	25.57	144,000.01	166,751.11	(22,751.10)
11 10 09	Total Stock Market Index Fund Instit	855	1,862.20	26.85	49,999.99	55,139.47	(5,139.48)
11 10 09	Total Stock Market Index Fund Instit	855	819.37	26.85	22,000.00	24,261.37	(2,261.37)
11 02 09	Windsor II Fund Admiral Shares	573	1,131.79	39.76	45,000.01	55,459.34	(10,459.33)
11 10 09	Windsor II Fund Admiral Shares	573	645.93	41.80	27,000.00	31,651.62	(4,651.62)
01 29 10	Inflation Protected Securities Fund A	5119	14,103.08	25.03	352,999.99	350,773.12	2,226.87
01 28 10	Total Bond Market Index Fund Institu	222	1,107.08	10.46	11,580.08	11,253.27	326.81
01 05 10	Strategic Equity Fund	114	3,201.02	15.62	49,999.99	53,698.42	(3,698.43)
01 05 10	Explorer Fund Admiral Shares	5024	550.26	54.52	30,000.01	31,738.37	(1,738.36)
01 05 10	Explorer Fund Admiral Shares	5024	183.42	54.52	10,000.00	10,669.61	(669.61)
01 05 10	Primecap Fund Admiral Shares	559	1,116.96	62.67	70,000.01	71,344.22	(1,344.21)

01 05.10	Total International Stock Index Fund	113	607,975.27	14.82	9,010,193.46	9,416,799.74	(406,606.28)
02.04 10	Total Stock Market Index Fund Institi	855	1,563.69	26.22	41,000.00	46,278.87	(5,278.87)
02.04.10	Windsor II Fund Admiral Shares	573	222.17	40.51	8,999.99	10,869.79	(1,869.80)
03.09.10	Strategic Equity Fund	114	498.44	16.05	7,999.99	8,643.83	(643.84)
03 23 10	Strategic Equity Fund	114	482.22	16.59	8,000.00	8,362.48	(362.48)
03 09.10	Explorer Fund Admiral Shares	5024	441.38	56.64	24,999.99	25,681.00	(681.01)
03 23 10	Explorer Fund Admiral Shares	5024	136.52	58.60	8,000.01	7,943.07	56.94
03 09 10	Total Stock Market Index Fund Institi	855	598.59	28.40	17,000.01	17,000.00	0.01
03.23 10	Total Stock Market Index Fund Institi	855	1,162.00	29.26	34,000.00	34,204.73	(204.73)
04 09 10	Strategic Equity Fund	114	649.35	16.94	11,000.01	11,260.85	(260.84)
04 14.10	Strategic Equity Fund	114	289.69	17.26	5,000.00	5,023.67	(23.67)
04 27.10	Strategic Equity Fund	114	1,804.42	17.18	31,000.00	31,291.78	(291.78)
04 09 10	Explorer Fund Admiral Shares	5024	84.01	59.52	4,999.98	4,887.66	112.32
04 14.10	Explorer Fund Admiral Shares	5024	147.32	61.09	9,000.02	8,571.75	428.27
04.27.10	Explorer Fund Admiral Shares	5024	412.88	60.55	25,000.01	24,022.71	977.30
04.27.10	REIT Index Fund Signal	1355	11,185.22	19.49	218,000.00	239,290.24	(21,290.24)
04.09 10	Total Stock Market Index Fund Institi	855	1,144.40	29.71	34,000.01	33,870.23	129.78
04 14 10	Total Stock Market Index Fund Institi	855	1,193.63	30.16	36,000.00	35,327.51	672.49
04 27 10	Total Stock Market Index Fund Institi	855	878.97	29.58	25,999.99	26,014.58	(14.59)
04 30 10	Inflation Protected Securities Fund A	5119	9,365.83	25.23	236,299.99	232,927.35	3,372.64
04.29 10	Total Bond Market Index Fund Institi	222	1,132.85	10.48	11,872.27	11,518.37	353.90
05.05.10	Strategic Equity Fund	114	602.05	16.61	10,000.00	10,440.52	(440.52)
05.05.10	Explorer Fund Admiral Shares	5024	273.04	58.60	16,000.03	15,886.17	113.86
05.05.10	Total Stock Market Index Fund Institi	855	4,473.50	29.06	130,000.00	132,400.48	(2,400.48)
05 05.10	Total Stock Market Index Fund Institi	855	1,720.58	29.06	50,000.00	50,923.26	(923.26)
05 05.10	Windsor II Fund Admiral Shares	573	1,001.14	43.95	44,000.02	48,981.88	(4,981.86)
06.18 10	Strategic Equity Fund	114	374.07	16.04	6,000.00	6,486.92	(486.92)
06 18 10	Explorer Fund Admiral Shares	5024	158.59	60.16	9,000.00	9,227.24	(227.24)
06.18 10	Primecap Fund Admiral Shares	559	82.11	60.16	5,000.00	5,363.95	(363.95)
06 18 10	Total Stock Market Index Fund Institi	855	1,074.50	27.92	30,000.00	31,801.52	(1,801.52)
06 18 10	Inflation Protected Securities Fund A	5119	395.11		10,000.00	9,826.12	173.88
	Inflation Protected Securities Fund A	5119	1,975.50		50,000.00	49,130.59	869.41
							(879,706.26)
					<u>13,396,786.88</u>	<u>14,276,493.14</u>	<u>(879,706.26)</u>

2009-2010 BOARD MEMBERS

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** Borough of Phoenixville Representative – appointed on annual basis

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Holly Megay
Administrative Assistant

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only Part I and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed)

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print File by the due date for filing your return. See instructions	Name of exempt organization	Employer identification number
	PHOENIXVILLE COMMUNITY HEALTH FOUNDATION	23-2912035
	Number, street, and room or suite no. If a P.O. box, see instructions.	
	821 GAY STREET	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	PHOENIXVILLE, PA 19460	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

LOUIS J. BECCARIA, PHD

- The books are in the care of ► **821 GAY STREET - PHOENIXVILLE, PA 19460**

Telephone No. ► **610-917-9890**

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

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **FEBRUARY 15, 2011**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

► ☐ calendar year _____ or

► ☒ tax year beginning **JUL 1, 2009**, and ending **JUN 30, 2010**

- 2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

3a 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.	3a	\$ 19,332.
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.	3b	\$ 36,107.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$ 0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. 1-2011)