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Short Form Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

2009

OMB No 1545-1150

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Department of the Treasury Internal Revenue Service

Sponsoring organizations of donor advised funds and controlling organizations as defined in section 512(b)(13) must file Form 990. All other organizations with gross receipts less than \$500,000 and total assets less than \$1,250,000 at the end of the year may use this form. The organization may have to use a copy of this return to satisfy state reporting requirements

For the 2009 calendar year, or tax year beginning 7/01 2009, and ending 6/30 2010 D Employer identification number Check if applicable Please Address change Illinois Symphony Orchestra Endowment 30-0216505 use IRS label or Name change Fund Inc. Telephone number print or Initial return 524 1/2 E Capitol Ave - Box 5191 217-522-2838 Termination Springfield, IL 62701 Specific Amended return Group Exemption tions. Application pending Number Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ). Accounting method: Cash X Accrual Other (specify) if the organization is not Check ► Website: ► N/A required to attach Schedule B (Form 990, 990-EZ, or 990-PF). X 501(c) (3 Tax-exempt status (check only one) -✓ (insert no) If the organization is not a section 509(a)(3) supporting organization and its gross receipts are normally not more than Check ► \$25,000. A Form 990 EZ or Form 990 return is not required, but if the organization chooses to file a return, be sure to file a complete return. Add lines 5b, 6b, and 7b, to line 9 to determine gross receipts; if \$500,000 or more, file Form 990 instead of Form 990-EZ. 258,948. Part 15 " Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions for Part I.) 30,000 Contributions, gifts, grants, and similar amounts received 2 Program service revenue including government fees and contracts 3 3 Membership dues and assessments 10,882. 4 Investment income. 5a 218,066 5a Gross amount from sale of assets other than inventory 5b 268,414 **b** Less: cost or other basis and sales expenses -50,348. c Gain or (loss) from sale of assets other than inventory (Subtract in 5b from in 5a) See Statement 1 5с 6 Special events and activities (complete applicable parts of Schedule G). If any amount is from gaming, check here a Gross revenue (not including \$ reported on line 1) 6a 6Ь b Less direct expenses other than fundraising expenses c Net income or (loss) from special events and activities (Subtract line 6b from line 6a) 6с 7a Gross sales of inventory, less returns and allowances 7 a 7 b b Less: cost of goods sold 7 c c Gross profit or (loss) from sales of inventory (Subtract line 7b from line 7a) Other revenue (describe 8 9 -9,466 Total revenue. Add lines 1, 2, 3, 4, 5c, 6c, 7c, and 8 See Statement 2 10 121,023 10 Grants and similar amounts paid (attach schedule) . 11 Benefits paid to or for members 11 12 12 Salaries, other compensation, and employee benefits Professional fees and other payments to independent conflictors 13 13 14 Occupancy, rent, utilities, and maintenance 14 Š 305 15 Printing, publications, postage, and shipping 15 MAR 07 2011 ഗ 16 16 Other expenses (describe Total expenses. Add lines 10 through 16 121,023 17 17 Excess or (deficit) for the year (Subtract line 17 from line 9(1) 18 -130,489 18 Net assets or fund balances at beginning of year (from line 27, column (A)) (must agree with end-of-year 19 19 464,313 figure reported on prior year's return) 20 101,065. 20 See Statement 3 Other changes in net assets or fund balances (attach explanation) 434,889 Net assets or fund balances at end of year Combine lines 18 through 20 21 21 Balance Sheets. If Total assets on line 25, column (B) are \$1,250,000 or more, file Form 990 instead of Form 990-EZ Part II (See the instructions for Part II.) (A) Beginning of year (B) End of year 464, 313. 22 434,889 22 Cash, savings, and investments 23 23 Land and buildings 24 Other assets (describe 464,313. 25 434,889. 25 Total assets 0. 26 0. 26 Total liabilities (describe 464,313. 27 434,889. Net assets or fund balances (line 27 of column (B) must agree with line 21)

Form 990-EZ (2009)

BAA For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.

	390-FS (5003) TITIHOTS SAMDHO	<u>-U2.</u>	16505 Page Z												
Pan	Statement of Program Ser	vice Accomplishments	(See the instruction	ons.)	/D	Expenses									
What is	s the organization's primary exempt purpose? See	e Statement 4			(Reg 5017	uired for section c)(3) and (4) nizations and section (a)(1) trusts; optional									
Desc	ribe what was achieved in carrying out th	orga	nizations and section												
descr	Describe what was achieved in carrying out the organization's exempt purposes. In a clear and concise manner, describe the services provided, the number of persons benefited, or other relevant information for each organ title. 28 Contributed to Illinois Symphony Orchestra, Inc. in order to														
					101 0	1									
28			Inc. in order	<u>to</u>											
	further its exempt purpos	e.													
]										
	(Cronto \$ 121 023 \) if th	is amount includes foreign gr	ants shock have		28a	121,023.									
	(Grants \$ 121,023.) If th	is amount includes loreign gr	ants, theth here	·	204	121,025.									
29															
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••	(Grants \$ 711 th	234													
30		Į													
	(Grants \$) If th	30 a													
31	Other program services (attach schedule														
•		. ▶ □	31 a												
32	Total program service expenses (add In	is amount includes foreign gr	anto, onoth noto.		32	121,023.									
															
Part IV List of Officers, Directors, Trustees, and Key Employees. List each one even if not compensated. (See t															
	(a) Name and address	(b) Title and average hours	(c) Compensation (If not paid, enter -0)	(d) Contributions employee benefit pla		(e) Expense account and other allowances									
	(a) Name and address	per week devoted to position	not paid, enter -v)	deferred compensa	iis ailu ation	and other allowances									
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		Treasurer	0.	· · · · · · · · · · · · · · · · · · ·	0.	0.									
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orn	n 990-EZ (2009) Illinois Symphony Orchestra Endowment	30-021650	5	P	age 3
Pai	t:V.: Other Information (Note the statement requirements in the instrs for Part V.)	See Sta	teme	nt	5
	•			Yes	No
33	Did the organization engage in any activity not previously reported to the IRS? If 'Yes,' attach a detailed each activity	description of	33		X
34		the changes	34		X
35	If the organization had income from business activities, such as those reported on lines 2, 6a, and 7a (among others), but not reported attach a statement explaining why the organization did not report the income on Form 990-T.	on Form 990-T,		5	
	Did the organization have unrelated business gross income of \$1,000 or more or was it subject to section reporting, and proxy tax requirements?	6033(e) notice,	35 a		Х
ŧ	olf 'Yes,' has it filed a tax return on Form 990-T for this year?		35 b		
	Did the organization undergo a liquidation, dissolution, termination, or significant disposition of net assets year? If 'Yes,' complete applicable parts of Schedule N		36	- Fine 1	X
	a Enter amount of political expenditures, direct or indirect, as described in the instructions ▶ 37a	0.	ئەتسىر ئەتسىر	4	
ŀ	Did the organization file Form 1120-POL for this year?.		37 b	2 25 300	X 2.84.74
38 a	a Did the organization borrow from, or make any loans to, any officer, director, trustee, or key employee or any such loans made in a prior year and still outstanding at the end of the period covered by this return?	were	38 a	7. 53.57. 3. 53.57.	X
ı	b If 'Yes,' complete Schedule L, Part II and enter the total amount involved.	N/A			
39	Section 501(c)(7) organizations. Enter:				
	a Initiation fees and capital contributions included on line 9	N/A			
	b Gross receipts, included on line 9, for public use of club facilities 39b	N/A			
40 :	a Section 501(c)(3) organizations. Enter amount of tax imposed on the organization during the year under:				
	section 4911 ► 0 . ; section 4912 ► 0 . , section 4955 ►	0.	题题		
	b Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in any section 4958 excess be transaction during the year or is it aware that it engaged in an excess benefit transaction with a disqualification year, and that the transaction has not been reported on any of the organization's prior Forms 990 or Yes, complete Schedule L, Part I	ed person in a l	40 b	***	X
(c Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax imposed on organization managers or disqualified persons during the year under sections 4912, 4955, and 4958	0.			
	d Section 501(c)(3) and 501(c)(4) organizations. Enter amount of tax on line 40c reimbursed by the organization	0.			
(e All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction? If 'Yes,' complete Form 8886-T		40 e		X
41	List the states with which a copy of this return is filed ► IL	,			
42	a The organization's books are in care of ► Trevor_Orthmann Located at ► 542 1/2 E Capitol Ave Springfield IL ZIF	e no. ► <u>217-52</u> + 4 ► <u>62701</u>	22-2	8 <u>38</u> 	
1	b At any time during the calendar year, did the organization have an interest in or a signature or other auth financial account in a foreign country (such as a bank account, securities account, or other financial account 'Yes,' enter the name of the foreign country:	nority over a punt)?	42b	Yes	No X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of a Foreign Bank and Financial Account c At any time during the calendar year, did the organization maintain an office outside of the U.S.? If 'Yes,' enter the name of the foreign country.	.s.	42 c		X
43	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-EZ in lieu of Form 1041 — Check here and enter the amount of tax-exempt interest received or accrued during the tax year	► 43	. (Yes	N/A N/A
44	Did the organization maintain any donor advised funds? If 'Yes,' Form 990 must be completed instead of Form 990-EZ		44	res	X

	EZ(2009) Illinois Symphony C	rchestra Endow	ment	30-02165		age 4
Part VI	Section 501(c)(3) organization 501(c)(3) organizations and se 46-49b and complete the table:	ction 4947(a)(1) no	nexempt charitab	charitable trusts only. le trusts must answer q	All section uestions	1
46 Did th	ne organization engage in direct or indire			r in opposition to candidates	Yes	No X
	ne organization engage in lobbying activi				47	X
	e organization a school as described in se	•		Jedule F	48	X
	ne organization make any transfers to an		•		49a	X
	s,' was the related organization a section	•			49b	
50 Comp	plete this table for the organization's five oyees) who each received more than \$10	highest compensated e	employees (other than from the organization	officers, directors, trustees a	and key	
	Name and address of each employee paid more than \$100,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account and other allowance	s
None						
						-
f Total	number of other employees paid over \$	100,000		· · · · · · · · · · · · · · · · · · ·		
51 Comp	plete this table for the organization's five sensation from the organization. If there is	highest compensated is none, enter 'None'	ndependent contracto	rs who each received more th	nan \$100,000	of
	(a) Name and address of each independent cont	ractor paid more than \$100,000		(b) Type of service	(c) Compensatio	'n
<u>None</u>						
						
	-					
		· · · · · · · · · · · · · · · · · · ·				-
					•	
d Total	number of other independent contractor	s each receiving over \$	100,000	<u> </u>		
	Under penalties of perjury, I declare that I have exam	nined this return, including acco	ompanying schedules and stat	tements, and to the best of my knowled	ige and belief, it is	s
	true, correct, and complete Declaration of preparer (Other than officer) is based on	all information of which prepa	arer nas any knowledge		
Sign Here	Signature of officer	m	D	12-25-	-/1	
	Type or print name and title.	Kalph	L. Hahn			
Paid Pro-	Preparer's signature John J. Bell 1	te>	Date 2/23/1		er's Identifying Nu istructions)	ımber
Pre- parer's Use		och & Company, , Suite 200	LLC, CPA's	EIN N/	A	
Only	address and	61701-3946		Phone no ► (309)	829-4303	3

May the IRS discuss this return with the preparer shown above? See instructions BAA

►X Yes No Form **990-EZ** (2009)

SCHEDULE A (Form 990 or 990-EZ)

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

Employer identification number

Schedule A (Form 990 or 990-EZ) 2009

OMB No 1545-0047

Omicelon lispedion

Department of the Treasury Internal Revenue Service Name of the organization

► Attach to Form 990 or Form 990-EZ. ► See separate instructions.

Illinois Symphony Orchestra Endowment

		Inc.							216505					
Part	Reason for Pu	blic Charity Statu	s (All organizations	must c	comple	te this	part.)	See ii	nstructi	ions				
			ise it is (For lines 1 thro											
1	A church, conventi	on of churches or asse	ociation of churches desc	cribed in	section	n 170(b)	(1)(A)(1)							
2	A school described in section 170(b)(1)(A)(ii). (Attach Schedule E)													
3														
4			d in conjunction with a h					0(b)(1)(A	AViii). En	iter the hospital's				
	name, city, and sta		,					- 1 - 11 - 11	J ()					
5		erated for the benefit	of a college or university	owned	or oper	ated by	a gover	nmenta	l unit des	scribed in section				
6														
7	An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in section 170(bX1XAXvi). (Complete Part II.)													
8	A community trust described in section 170(b)(1)(A)(vi). (Complete Part II.)													
9														
10	An organization or	ganized and operated	exclusively to test for pu	ıblıc safe	ety. See	section	509(a)	(4).						
11	more publicly supp	orted organizations d	exclusively for the benefices in section 509(a ration and complete lines	a)(1) or	section	509(a)(2	ctions o 2). See	of, or ca section	rry out th 509(a)(3)	ne purposes of one or). Check the box tha				
	a X Type I b Type II c Type III – Functionally integrated d Type III – Other													
е														
f		received a written det	ermination from the IRS	that is a	Type I	, Type II	or Typ	e III sup	porting o	organization,				
g	Since August 17, 2	2006, has the organiza	tion accepted any gift o	r contrib	ution fr	om anv	of the fo	ollowina	persons	7				
		, g.							P 0.000	Yes No				
	(i) a person who	directly or indirectly overning body of the si	controls, either alone or upported organization?	together	with pe	ersons d	escribe	d in (ii)	and (III)	11 g (i) X				
		nber of a person desc								11g (ii) X				
	• • •	*	described in (i) or (ii) a	hove?				•	•	11g (iii) X				
h	• •	• •	he supported organization							119 ()				
	(i) Name of Supported Organization	(ii) EIN	(lii) Type of organization (described on lines 1-9 above or IRC section (see instructions))	(iv) l organizat (i) listed gove	s the ion in col i in your rning ment?	the organ	ou notify ization in (i) of ipport?	organizat	zed in the					
				Yes	No	Yes	No	Yes	No					
				1	···•					 				
I11:	inois Symphony	Orchestra. In	c.											
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Total						` .	* 7,1		1	121,023				
			see the Instructions for Form	<u> </u>						n 990 or 990-EZ) 200				

Sche	dule A (Form 990 or 990-EZ) 200	9 Illinois	Symphony C	rchestra Er	ndowment	30-021	L6505	Page 2
Pär	til Support Schedule for					d 170(b)(1)(A)(vi)
Sec	(Complete only if you check tion A. Public Support	ed the box on line	5, 7, or 8 of Par	t I.)				
					I		Т	
begi	ndar year (or fiscal year nning in) ►	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 200	19	(f) Total
	Gifts, grants, contributions and membership fees received (Do not include 'unusual grants.')							
2	Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf.							
3	The value of services or facilities furnished to the organization by a governmental unit without charge Do not include the value of services or facilities generally furnished to the public without charge.							
4	Total. Add lines 1-through 3					-		
5	The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)							
6	Public support. Subtract line 5 from line 4							
<u>Sec</u>	tion B. Total Support				· · · · · · · · · · · · · · · · · · ·			
Cale begi	ndar year (or fiscal year nning in) ►	(a) 2005	(b) 2006	(c) 2007	(d) 2008	(e) 2009		(f) Total
7	Amounts from line 4 .							
8	Gross income from interest, dividends, payments received on securities loans, rents, royalties and income form similar sources							
9	Net income from unrelated business activities, whether or not the business is regularly carried on							
10	Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV).							
11	Total support. Add lines 7 through 10							
12	Gross receipts from related activ	vities, etc. (see in:	structions)				12	
13	First five years. If the Form 990 organization, check this box and		ation's first, secor	nd, third, fourth,	or fifth tax year as	s a section	501(c)(3) ▶ □
Sec	tion C. Computation of Pu	blic Support P	ercentage					
14 15	Public support percentage for 20 Public support percentage from	•	• •	ne 11, column (f)			14 15	<u>%</u>
16 a	33-1/3 support test – 2009. If the and stop here. The organization	e organization did	I not check the bo	ox on line 13, and	the line 14 is 33	-1/3 % or m	ore, ch	eck this box
ŧ	33-1/3 support test - 2008. If the and stop here. The organization	e organization did	I not check a box	on line 13, or 16a	a, and line 15 is 3	3-1/3% or n	nore, cl	neck this box
17 a	10%-facts-and-circumstances to or more, and if the organization the organization meets the 'facts	meets the 'facts-a	and-circumstance:	s' test, check this	box and stop her	e. Explain i	n Part	IV how
	o 10%-facts-and-circumstances to or more, and if the organization organization meets the 'facts-and standard to the 'facts-and st	meets the 'facts-a d-circumstances'	and-circumstance: test The organi	s' test, check this zation qualifies as	box and stop hei s a publicly suppo	re. Explain in reted organia	n Part zation.	IV how the . ▶ □
18 RAA	Private foundation. If the organi	ization did not che	eck a box on line,	13, 16a, 16b, 17a				or 990-FZ) 2009

Schedule A (Form 990 or 990-EZ) 2009 Illinois Symphony Orchestra Endowment 30-0216505 Page 3 Randlli Support Schedule for Organizations Described in Section 509(a)(2) (Complete only if you checked the box on line 9 of Part I) Section A. Public Support Calendar year (or fiscal yr beginning in) ► (a) 2005**(b)** 2006 (c) 2007 (d) 2008 (e) 2009 (f) Total Gifts, grants, contributions and membership fees received. (Do not include 'unusual grants.') Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in a activity that is related to the organization's tax-exempt purpose Gross receipts from activities that are not an unrelated trade or business under section 513 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf The value of services or facilities furnished by a governmental unit to the organization without charge 6 Total. Add lines 1 through 5 7a Amounts included on lines 1, 2, 3 received from disqualified persons b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of 1% of the amount on line 13 for the year. c Add lines 7a and 7b 8 Public support (Subtract line 7c from line 6.) **Section B. Total Support** Calendar year (or fiscal yr beginning in) (a) 2005 (b) 2006 (c) 2007 (d) 2008 (e) 2009 (f) Total 9 Amounts from line 6 10 a Gross income from interest. dividends, payments received on securities loans, rents, rovalties and income form similar sources. **b** Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 c Add lines 10a and 10b . 11 Net income from unrelated business activities not included inline 10b, whether or not the business is regularly carried on . Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV) "是个特别的特别是这些人强烈,但是一个不是一个不是 13 Total support. (add ins 9, 10c, 11, and 12) First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here Section C. Computation of Public Support Percentage 15 Public support percentage for 2009 (line 8, column (f) divided by line 13, column (f)). 15 % Public support percentage from 2008 Schedule A, Part III, line 15 16 % Section D. Computation of Investment Income Percentage 17 17 Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f)) % 18 Investment income percentage from 2008 Schedule A, Part III, line 17 18 % 19a 33-1/3 support tests - 2009. If the organization did not check the box on line 14, and line 15 is more than 33-1/3%, and line 17 is not more than 33-1/3%, check this box and stop here. The organization qualifies as a publicly supported organization b 33-1/3 support tests - 2008. If the organization did not check a box on line 14 or 19a, and line 16 is more than 33-1/3%, and line 18

is not more than 33-1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization **20 Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions

Part IV	Supple	ement	al Info	rmati	on. Co	omole	te thi	s parl	to pr	ovide	the e	xplanat	ions r	require	d by P	art II I	ne 10:	age 4
	Part II	, line 1	7a or	17b;	and P	art III,	, line	12. P	rovide	any	other	additio	nal in	format	ion. Se	e instr	uctions	•
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Schedule A (Form 990 or 990-EZ) 2009

BAA

2009

Federal Statements

Page 1

Illinois Symphony Orchestra Endowment Fund Inc.

30-0216505

Statement 1 Form 990-EZ, Part I, Line 5c **Net Gain (Loss) from Noninventory Sales**

Publicly Traded Securities

Gross Sales Price: Cost or Other Basis:

218,066. 268,414.

Total Gain (Loss) Publicly Traded Securities \$

Total Net Gain (Loss) From Noninventory Sales \$

Statement 2 Form 990-EZ, Part I, Line 10 **Grants and Similar Amounts Paid**

General

Class of Activity: Donee's Name: Donee's Address:

Illinois Symphony Orchestra, Inc. 542 1/2 E Capital Ave. Springfield, IL 62701

Cash Amount Given:

121,023.

No

No

Statement 3 Form 990-EZ, Part I, Line 20 Other Changes In Net Assets Or Fund Balances

Net Unrealized Gains and Losses on Investments

101,065. Total \$

Statement 4 Form 990-EZ, Part III **Organization's Primary Exempt Purpose**

To provide support to Illinois Symphony Orchestra, Inc. in order to further its exempt purpose

Statement 5 Form 990-EZ, Part V Regarding Transfers Associated with Personal Benefit Contracts

(a) Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?. (b) Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?