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Form 990-PF

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

2009

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

Department of the Treasury Internal Revenue Service

For calendar year 2009, or tax year beginning 07-01-2009, and ending 06-30-2010

G Check all that apply Initial return, Amended return, Address change, Name change, Initial return of a former public charity, Final return

Use the IRS label. Otherwise, print or type. See Specific Instructions. Name of foundation: The Lima Community Foundation. A Employer identification number: 34-6577091. B Telephone number: (419) 221-5928.

H Check type of organization: Section 501(c)(3) exempt private foundation. I Fair market value of all assets at end of year: \$ 4,634,307. J Accounting method: Cash.

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

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), ending with Excess of revenue over expenses and disbursements (-143,845) and Net investment income (85,867).

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

Part II Balance Sheets		Beginning of year		End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash—non-interest-bearing	6,748	41,931	41,931	
	2 Savings and temporary cash investments	632,864	364,571	364,571	
	3 Accounts receivable <input type="checkbox"/> _____ Less allowance for doubtful accounts <input type="checkbox"/> _____				
	4 Pledges receivable <input type="checkbox"/> _____ Less allowance for doubtful accounts <input type="checkbox"/> _____				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)				
	7 Other notes and loans receivable (attach schedule) <input type="checkbox"/> _____ Less allowance for doubtful accounts <input type="checkbox"/> _____				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments—U S and state government obligations (attach schedule)				
	b Investments—corporate stock (attach schedule)				
	c Investments—corporate bonds (attach schedule)				
	11 Investments—land, buildings, and equipment basis <input type="checkbox"/> _____ Less accumulated depreciation (attach schedule) <input type="checkbox"/> _____				
	12 Investments—mortgage loans				
	13 Investments—other (attach schedule)	4,272,770	4,358,505	4,223,278	
	14 Land, buildings, and equipment basis <input type="checkbox"/> <u>2,088</u> Less accumulated depreciation (attach schedule) <input type="checkbox"/> <u>1,508</u>	997	580	580	
15 Other assets (describe <input type="checkbox"/> _____)		3,947	3,947		
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	4,913,379	4,769,534	4,634,307		
Liabilities	17 Accounts payable and accrued expenses				
	18 Grants payable				
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable (attach schedule)				
	22 Other liabilities (describe <input type="checkbox"/> _____)				
	23 Total liabilities (add lines 17 through 22)		0		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27 Capital stock, trust principal, or current funds	170,821	170,821		
	28 Paid-in or capital surplus, or land, bldg, and equipment fund				
29 Retained earnings, accumulated income, endowment, or other funds	4,742,558	4,598,713			
30 Total net assets or fund balances (see page 17 of the instructions)	4,913,379	4,769,534			
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	4,913,379	4,769,534			

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	4,913,379
2	Enter amount from Part I, line 27a	2	-143,845
3	Other increases not included in line 2 (itemize) <input type="checkbox"/> _____	3	
4	Add lines 1, 2, and 3	4	4,769,534
5	Decreases not included in line 2 (itemize) <input type="checkbox"/> _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	4,769,534

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)
1 a	See PDF Attachment	P	2009-01-01	2010-01-01
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 1,410,451		1,578,080	-167,629
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			-167,629
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-167,629
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		}	3

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
 If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	212,339	4,196,604	0 05060
2007	270,709	3,816,764	0 07093
2006	144,251	1,465,219	0 09845
2005	8,509	153,660	0 05538
2004			

2	Total of line 1, column (d).	2	0 27535
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	0 06884
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.	4	4,655,250
5	Multiply line 4 by line 3.	5	320,458
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	859
7	Add lines 5 and 6.	7	321,317
8	Enter qualifying distributions from Part XII, line 4.	8	141,755

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

Table with 11 rows for excise tax calculations. Includes sub-rows 6a-6d for credits and payments. Total tax due is 23, overpayment is 260, and 0 is credited to 2010 estimated tax.

Part VII-A Statements Regarding Activities

Table with 10 rows of activity statements. Columns include question number, Yes, and No. Questions cover political activities, unrelated business income, and state reporting requirements.

Part VII-A Statements Regarding Activities (continued)

<p>11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).</p>	11		No
<p>12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?</p>	12		No
<p>13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>www.limacommunityfoundation.org</u></p>	13	Yes	
<p>14 The books are in care of ▶ <u>Susie A Crabtree</u> Telephone no ▶ <u>(419) 221-5928</u> Located at ▶ <u>101 N Elizabeth St Suite 509 Lima OH</u> ZIP+4 ▶ <u>45801</u></p>			
<p>15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶ 15</p>			

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
<p>1a During the year did the foundation (either directly or indirectly)</p> <p>(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(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</p> <p>(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(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</p> <p>(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</p>			
<p>b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? . . . Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/></p>	1b		No
<p>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?</p>	1c		No
<p>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))</p> <p>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 ▶ 20____, 20____, 20____, 20____</p> <p>b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions).</p> <p>c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____</p>			
<p>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</p> <p>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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.</i>)</p>	3b		No
<p>4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?</p>	4a		No
<p>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?</p>	4b		No

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

<p>5a During the year did the foundation pay or incur any amount to</p> <p>(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions). . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/></p> <p>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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," attach the statement required by Regulations section 53.4945–5(d).</p> <p>6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes" to 6b, file Form 8870.</p> <p>7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	5b	No
6b	6b	No
7b	7b	No

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(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
Deborah S Violet 2981 Blue Jacket Court Lima, OH 45806	Treasurer 0 00	0		
Susie A Crabtree 122 E Main Street St Paris, OH 43072	Secretary 24 00	25,650		
Phillip L Trueblood 1535 Pro Drive Lima, OH 45805	Vice President 0 00	0		
John W MacDonell 2324 West Market Street Lima, OH 45805	President 20 00	0		

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


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

Total number of other employees paid over \$50,000.

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services. 

Part IX-A Summary of Direct Charitable Activities

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

Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 _____	
2 _____	
3 All other program-related investments See page 24 of the instructions _____	

Total. Add lines 1 through 3. 

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	4,700,018
b	Average of monthly cash balances.	1b	25,388
c	Fair market value of all other assets (see page 24 of the instructions).	1c	736
d	Total (add lines 1a, b, and c).	1d	4,726,142
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	
3	Subtract line 2 from line 1d.	3	4,726,142
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	70,892
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	4,655,250
6	Minimum investment return. Enter 5% of line 5.	6	232,763

Part XI Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	232,763
2a	Tax on investment income for 2009 from Part VI, line 5.	2a	1,717
b	Income tax for 2009 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,717
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	231,046
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	231,046
6	Deduction from distributable amount (see page 25 of the instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	231,046

Part XII Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	141,755
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	141,755
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	141,755

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

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

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				231,046
2 Undistributed income, if any, as of the end of 2008				
a Enter amount for 2008 only.				
b Total for prior years 20___, 20___, 20___				
3 Excess distributions carryover, if any, to 2009				
a From 2004.				
b From 2005.				883
c From 2006.				72,130
d From 2007.				82,498
e From 2008.				4,498
f Total of lines 3a through e.	160,009			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ <u>141,755</u>				
a Applied to 2008, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required—see page 26 of the instructions).	0			
d Applied to 2009 distributable amount.				141,755
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2009 <i>(If an amount appears in column (d), the same amount must be shown in column (a).)</i>	89,291			89,291
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	70,718			
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions.				
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions.				
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions).				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions).				
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a.	70,718			
10 Analysis of line 9				
a Excess from 2005.				
b Excess from 2006.				
c Excess from 2007.				66,220
d Excess from 2008.				4,498
e Excess from 2009.				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling. _____

b Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

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

Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

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

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

Check here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number of the person to whom applications should be addressed

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

c Any submission deadlines

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

Part XV **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> See Additional Data Table				
Total				▶ 3a 141,755
b <i>Approved for future payment</i>				
Total				▶ 3b

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 organization

The Lima Community Foundation

Employer identification number

34-6577091

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

501(c)() (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

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

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

General Rule—

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

Special Rules

For a section 501(c)(3) organization filing Form 990 or 990-EZ, that met the 33¹/₃% 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 in the heading 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).

Name of organization
The Lima Community Foundation

Employer identification number

34-6577091

Part I **Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
<u>4</u>	Lois M Rubens 2469 Struthmore Drive _____ Lima, OH 45806 _____	\$ <u>15,503</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>3</u>	Mike Mullen Fund PO Box 1086 _____ Lima, OH 45802 _____	\$ <u>5,000</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>2</u>	The American Society of Ephesus Inc 500 Kettering Tower _____ Dayton, OH 45423 _____	\$ <u>10,000</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>1</u>	AD MacDonell Jr 1418 West Market Street _____ Lima, OH 45805 _____	\$ <u>5,000</u>	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)

Name of organization The Lima Community Foundation	Employer identification number 34-6577091
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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
—	<hr/> <hr/> <hr/> <hr/>	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
—	<hr/> <hr/> <hr/> <hr/>	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
—	<hr/> <hr/> <hr/> <hr/>	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
—	<hr/> <hr/> <hr/> <hr/>	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
—	<hr/> <hr/> <hr/> <hr/>	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
—	<hr/> <hr/> <hr/> <hr/>	\$ _____	_____

Name of organization The Lima Community Foundation	Employer identification number 34-6577091
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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	
_____ _____		_____ _____ _____	

Additional Data

Software ID: 09000047
Software Version:
EIN: 34-6577091
Name: The Lima Community Foundation

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year				
FOP750 W Robb Ave Lima, OH 45801	None		Program Support	1,000
West Central Ohio Land Conservancy PO Box 503 Lima, OH 45802	None		Program Support	500
University of Cincinnati 2600 Clifton Ave Cincinnati, OH 45221	None		Scholarships	140
Tiffin University Seitz Hall - 155 Miami St Tiffin, OH 44883	None		Scholarships	70
The University of Akron PO Box 2260 Akron, OH 44309	None		Scholarships	620
Tennessee State University 3500 John A Merritt Blvd Nashville, TN 37209	None		Scholarships	70
Ottawa River Coalition 3900 Campus Drive - Suite A Lima, OH 45804	None		Program Support	250
Ohio State University Medical Center 154 W 12th Ave Columbus, OH 43210	None		Scholarships	2,000
Midway East Neighborhood Association 727 E Kibby St Lima, OH 45804	None		Program Support	200
Lima Allen County VMCCC Foundation 7 Town Square Lima, OH 45801	None		Program Support	4,000
Lima Allen County Neighborhood in P 50 Town Square Lima, OH 45801	None		Program Support	600
Keep Allen County Beautiful 130 W North St Lima, OH 45801	None		Program Support	500
Elm Street Church of the Brethren 619 E Elm St Lima, OH 45805	None		Program Support	750
Dr Martin Luther King Neighborhood PO Box 5062 Lima, OH 45802	None		Program Support	200
Defiance College Clinton St Defiance, OH 43512	None		Scholarships	70
Total				141,755

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
Bethel College Indiana1001 W McKinley Ave Mishawake,IN 46545	None		Scholarships	770
Baldwin Wallace College275 Eastland Road Berea,OH 44017	None		Scholarships	70
Wright State University3640 Colonel Glenn Highway Dayton,OH 45435	None		Scholarships	70
Wittenberg UniversityPO Box 720 Springfield,OH 45501	None		Scholarships	70
West Ohio Food Bank1380 East Kibby Street Lima,OH 45804	None		Program support	500
WBGU-PBS245 Troup Avenue Bowling Green,OH 43403	None		Program support	1,050
University of Northwestern Ohio1441 North Cable Road Lima,OH 45805	None		Scholarships	1,450
United Way of Greater Lima616 South Collett Street Lima,OH 45805	None		Program support	38,000
The University of Toledo2801 Bancroft Street Toledo,OH 43606	None		Scholarships	5,650
The Ohio State University - Lima Ca 4020 Campus Drive Lima,OH 45804	None		Scholarships	2,070
The Ohio State University200 Lincoln Tower 1800 Cannon Drive Columbus,OH 43210	None		Scholarships	3,340
Ships of Discovery Exploration1900 North Chaparral Street Corpus Christi,TX 78401	None		Program support	1,000
Rhodes State College4240 Campus Drive Lima,OH 45804	None		Scholarships	1,880
Public Broadcasting Foundation of N 1270 South Detroit Avenue Toledo,OH 43614	None		Program support	1,000
Pine Cay Project2201 Merit Avenue Lima,OH 45805	None		Program support	2,000
Total				141,755

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
Otterbein CollegeOne Otterbein College Westerville, OH 43081	None		Scholarships	2,370
Ohio University010 Chubb Hall Athens, OH 45701	None		Scholarships	870
Ohio Northern University525 S Main Street Ada, OH 45810	None		Scholarships	2,070
National Trust for Historic Preserv 1785 Massachusetts Ave NW Washington, DC 20036	None		Program support	500
Lima Symphony Orchestra133 North Elizabeth Street Lima, OH 45801	None		Program support	1,000
Lima Rescue Mission216 E Wayne Street Lima, OH 45801	None		Human service program	500
Lima City Board of Education515 Calumet Ave Lima, OH 45804	None		Program support	12,200
Lima Central Catholic High720 South Cable Road Lima, OH 45805	None		Support education in community	1,000
Kent State UniversityPO Box 5190 Kent, OH 44242	None		Scholarships	620
International Business College7205 Shadeland Station Indianapolis, IN 46256	None		Scholarships	70
Friends of the Turks and Caicos Nat 1900 North Chaparral Street Corpus Christi, TX 78401	None		Scholarships	2,000
Equestrian Therapy Program22532 Bowsler Road Cridersville, OH 45806	None		Program support	20,405
Denison UniversityPO Box 810 Granville, OH 43023	None		Scholarships	5,000
Crossroads Crisis Center Inc2321 West Market Street Lima, OH 45805	None		Program support	500
Council for the Arts of Greater LimPO Box 1124 Lima, OH 45802	None		Community art program	4,850
Total				141,755

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
Columbus College of Art Design107 North 9th Street Columbus, OH 45215	None		Scholarships	70
Capital University1 College and Main Columbus, OH 43209	None		Scholarships	620
Boy Scouts of America - Black Swamp 752 W Robb Avenue Lima, OH 45801	None		Support of youth program	3,500
Bowling Green State University1001 E Wooster Street Bowling Green, OH 43403	None		Scholarships	1,150
Bluffton University1 University Drive Bluffton, OH 45817	None		Scholarships	70
Art Institute of Chicago37 South Wabash Avenue Chicago, IL 60603	None		Support of national art program	500
American Red CrossAllen County Chap610 South Collett Street Lima, OH 45801	None		Support of the community	11,500
Allen County Historical Society620 West Market Street Lima, OH 45801	None		Support of community history	500
Total				141,755

3a

TY 2009 Accounting Fees Schedule

Name: The Lima Community Foundation

EIN: 34-6577091

Software ID: 09000047

Software Version: 2009v1.7

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Tax Prep Fee	500	0	0	0

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2009 Depreciation Schedule

Name: The Lima Community Foundation

EIN: 34-6577091

Software ID: 09000047

Software Version: 2009v1.7

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
Laptop Computer	2008-04-30	791	184	54	20 00 %	158			
Computer	2005-07-12	1,297	907	54	20 00 %	259			

TY 2009 Land, Etc. Schedule

Name: The Lima Community Foundation

EIN: 34-6577091

Software ID: 09000047

Software Version: 2009v1.7

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Machinery and Equipment	2,088	1,508	580	580

TY 2009 Other Assets Schedule

Name: The Lima Community Foundation

EIN: 34-6577091

Software ID: 09000047

Software Version: 2009v1.7

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Rounding		1	
Rounding			1
Pangle Build Note Rec		3,946	3,946

TY 2009 Other Expenses Schedule

Name: The Lima Community Foundation

EIN: 34-6577091

Software ID: 09000047

Software Version: 2009v1.7

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Telephone	2,486			
Reimbursement	900			
Program Expense	8,893			
Organizational Expense	200			
Office Supplies	719			
Miscellaneous Expense	5,154			
Membership Fees	525			
Internet	350			
Insurance	1,812			
Equipment	689			
Bank Charges	7,452			

TY 2009 Other Income Schedule

Name: The Lima Community Foundation

EIN: 34-6577091

Software ID: 09000047

Software Version: 2009v1.7

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Other Investment Income	307		
Fed Excise Tax Refund	510		

TY 2009 Other Professional Fees Schedule

Name: The Lima Community Foundation

EIN: 34-6577091

Software ID: 09000047

Software Version: 2009v1.7

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment Mgmt Fees	17,869	17,869	0	0

TY 2009 Taxes Schedule

Name: The Lima Community Foundation

EIN: 34-6577091

Software ID: 09000047

Software Version: 2009v1.7

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Excise Tax on Investment Income	4,253			

The Lima Community Foundation
EIN 34-6577091
2009 Realized Gains and Losses

# Shares	Description	Date Acquired	Date Sold	Proceeds	Cost	Gain/ (Loss)
1000	SPDR Tr	various	7/2/2009	92,517 62	88,300 00	4,217 62
3655 212	JPMorgan International Equity Index Fund	various	9/16/2009	67,438 66	101,000 00	(33,561 34)
983	JPMorgan Intrepid Internation Fund	various	9/16/2009	15,482 25	23,422 36	(7,940 11)
8697	JPMorgan US Equity Fund	various	9/16/2009	73,402 68	90,013 95	(16,611 27)
4852	Artio Global Invt Fds	various	9/16/2009	58,029 92	36,681 12	21,348 80
1120	JPMorgan Intrepid International Fund	various	9/16/2009	17,640 00	29,299 21	(11,659 21)
12115	JPMorgan US Equity Fund	various	9/16/2009	102,250 60	129,024 75	(26,774 15)
1693 002	JPMorgan US Equity Fund	various	11/13/2009	15,000 00	17,522 57	(2,522 57)
2483 07	JPMorgan US Equity Fund	various	11/13/2009	22,000 00	26,444 70	(4,444 70)
2752 294	JPMorgan Short Duration Bond Fund	various	11/13/2009	30,000 00	29,449 55	550 45
1409	JPMorgan Strategic Income Opportunities Fund	various	12/16/2009	7 03	-	7 03
955 302	JPMorgan Intrepid Internation Fund	various	1/6/2010	15,495 00	24,312 43	(8,817 43)
1364 709	JPMorgan Intrepid International Fund	various	1/6/2010	22,135 58	35,700 79	(13,565 21)
1375	JPMorgan Highbridge Statistical Market Neutral Fund	various	1/8/2010	21,587 50	22,000 00	(412 50)
2057	JPMorgan Short Duration Bond Fund	various	1/12/2010	22,421 30	22,009 90	411 40
1426	JPMorgan Short Duration Bond Fund	various	1/12/2010	15,543 40	15,258 20	285 20
5342 832	JPMorgan Core Bond Fund	various	3/19/2010	60,000 00	56,899 08	3,100 92
1467 89	JPMorgan Short Duration Bond Fund	various	3/19/2010	16,000 00	15,706 42	293 58
2226 18	JPMorgan Core Bond Fund	various	3/19/2010	25,000 00	23,815 13	1,184 87
489 061	JPMorgan TRI	various	3/22/2010	7,644 02	7,653 80	(9 78)
937 5	JPMorgan TRI	various	3/22/2010	14,981 25	15,000 00	(18 75)
530	Ishares Russell 2000 Index Fund	various	3/24/2010	36,257 73	29,102 51	7,155 22
215	Aston Funds Tamro S Cap	various	3/24/2010	3,921 60	2,878 85	1,042 75
753	Ishares Russell 2000 Index Fund	various	3/24/2010	51,513 34	41,347 53	10,165 81
276	Aston Funds Tamro S Cap	various	3/24/2010	5,034 24	3,695 64	1,338 60
1458 775	JPMorgan Intrepid American Fund	various	3/31/2010	31,276 14	41,913 03	(10,636 89)
1754 874	JPMorgan Intrepid American Fund	various	4/1/2010	37,624 50	52,382 99	(14,758 49)
2489 905	JPMorgan Intrepid Long Short Fund	various	4/21/2010	35,032 96	33,962 30	1,070 66
717 622	JPMorgan TR I	various	4/21/2010	11,159 02	11,230 78	(71 76)
1341 073	Diamond Hill Large Cap Fund - A	various	5/5/2010	18,989 59	21,304 69	(2,315 10)
2245 133	Dodge & Cox Income Fund	various	5/5/2010	29,680 66	28,105 92	1,574 74
359 699	Growth Fund American Inc Class F2	various	5/5/2010	10,136 32	11,930 33	(1,794 01)
400	Flaherty & Crumrine PFD Income Opportunity Fund	various	5/7/2010	4,068 09	3,795 20	272 89
50	Ishares Tr MSCI Emerging Markets Index Fund	various	5/7/2010	2,019 96	2,332 73	(312 77)
50	Ishares MSCI Eafe Index Fund	various	5/7/2010	2,626 95	2,142 50	484 45
50	Ishares Russell 2000 Index Fund	various	5/7/2010	3,549 93	2,510 50	1,039 43
6 032	Europacific Growth Fund	various	5/19/2010	209 43	222 10	(12 67)

36 64 Fifth Third Disciplined Large Value Fund	various	5/19/2010	349 18	367 13	(17 95)
9 899 Lazard Emerging Markets Port	various	5/19/2010	177 38	188 48	(11 10)
269 Ishares MSCI Eafe Index Fund	various	6/8/2010	12,475 47	15,025 43	(2,549 96)
6289 Arto International Equity	various	6/10/2010	66,160 28	75,483 77	(9,323 49)
388 Ishares MSCI Eafe Index Fund	various	6/11/2010	17,994 35	21,672 36	(3,678 01)
8986 Arto International Equity	various	6/11/2010	94,532 72	76,315 14	18,217 58
66 378 Columbia Mid Cap Value Fund Class Z	various	6/18/2010	775 29	629 24	146 05
16 101 Europacific Growth Fund	various	6/18/2010	577 22	592 84	(15 62)
91 807 Fifth Third Disciplined Large Value Fund	various	6/18/2010	868 50	919 91	(51 41)
73 425 Fifth Third Short Term Bond Fund	various	6/18/2010	700 48	699 75	0 73
31 915 Growth Fund American Inc Class F2	various	6/18/2010	862 66	1,007 39	(144 73)
138 Pimco All Asset All Auth Fund	various	6/18/2010	1,462 80	1,465 56	(2 76)
15 31 T Rowe Price Mid-Cap Growth Fund	various	6/18/2010	785 08	810 51	(25 43)
42 IPAth Dow Jones-UBS Commodity	various	6/22/2010	1,623 94	1,678 28	(54 34)
17 Ishare Barclays Tips Bond Fund	various	6/22/2010	1,808 50	1,801 49	7 01
5 Ishares Cohen & Steers Realty Bernstein, Sanford & Co	various	6/22/2010	302 95	312 85	(9 90)
Huntington - Lima City Schools Scholarship Fund	various	various	40,657 19	54,333 54	(13,676 35)
Huntington - Lima City Schools Foundation	various	various	65,413 45	91,898 51	(26,485 06)
Huntington - Werst Scholarship Fund	various	various	3,838 47	5,044 36	(1,205 89)
Huntington - McBride Family Fund	various	various	78,084 39	97,037 33	(18,952 94)
Huntington - Hoehn Family Endowment Fund	various	various	5,341 74	7,624 80	(2,283 06)
Huntington - Woodlawn Historical Cemetary Fund	various	various	8,524 77	11,442 76	(2,917 99)
Huntington - The Children's Garden Fund	various	various	9,457 37	13,356 59	(3,899 22)
Fiscal Year 2009 Total			1,410,451 45	1,578,079 58	(167,628 13)