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990-PF

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

OMB No 1545-0052

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c Adjusted net income (if negative, enter -0-). . For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions. 9E1410 2 0000 B4R00Y P178 11/2/2010 5:00:55 PM V 09-8.4

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

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Part III Analysis of Changes in Net Assets or Fund Balances Total net assets or fund balances at beginning of year - Part III, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) Enter amount from Part I, line 27a Add lines 1, 2, and 3 Decreases not included in line 2 (itemize) Part III 29 Retained eamings, accumulated income, endowment, or other funds 787, 126. 695, 596. 787, 126. 695, 596. 695, 596. 787, 126.	39	26			·	
Part III Analysis of Changes in Net Assets or Fund Balances Total net assets or fund balances at beginning of year - Part III, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) Enter amount from Part I, line 27a Add lines 1, 2, and 3 Decreases not included in line 2 (itemize) Part III 29 Retained eamings, accumulated income, endowment, or other funds 787, 126. 695, 596. 787, 126. 695, 596. 695, 596. 787, 126.	힏					
Part III Analysis of Changes in Net Assets or Fund Balances Total net assets or fund balances at beginning of year - Part III, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) Enter amount from Part I, line 27a Add lines 1, 2, and 3 Decreases not included in line 2 (itemize) Part III 29 Retained eamings, accumulated income, endowment, or other funds 787, 126. 695, 596. 787, 126. 695, 596. 695, 596. 787, 126.	٦					
Part III Analysis of Changes in Net Assets or Fund Balances Total net assets or fund balances at beginning of year - Part III, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) Enter amount from Part I, line 27a Add lines 1, 2, and 3 Decreases not included in line 2 (itemize) Part III 29 Retained eamings, accumulated income, endowment, or other funds 787, 126. 695, 596. 787, 126. 695, 596. 695, 596. 787, 126.	ž	27				
31 Total liabilities and net assets/fund balances (see page 17 of the instructions). 787,126. 787,126. 695,596. 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	8	28	* * * * * * * * * * * * * * * * * * * *			
31 Total liabilities and net assets/fund balances (see page 17 of the instructions). 787,126. 787,126. 695,596. 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	88			787 126	695 596	
31 Total liabilities and net assets/fund balances (see page 17 of the instructions). 787,126. 787,126. 695,596. 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	8			7077120.	033,330.	
31 Total liabilities and net assets/fund balances (see page 17 of the instructions). 787,126. 787,126. 695,596. 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	삘	30	· · · · · · · · · · · · · · · · · · ·	707 126	605 506	
of the instructions). 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 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with 1 787, 126 2 91, 530 2 91, 53	z	• •	Instructions)	101,120.	093,390.	
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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5	-	31	,	707 106	605 506	
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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5	ᆚ		or the instructions)		695,596.	Line St. L. T.
end-of-year figure reported on prior year's return) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5						
2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 5	1					_
2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 5		end-	of-year figure reported on prior year's return)			787,126.
3 Other increases not included in line 2 (itemize) ▶		Ente	r amount from Part I, line 27a			-91,530.
4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶	3	Othe				
5 Decreases not included in line 2 (itemize) ▶5	4	Add				695,596.
` '' ============						<u> </u>
			` ' `	line 5) - Part II. column (h		695,596.

Р	art IV Capital Gains	s and Losses for Tax on Inve	estment Income					
		e g., real estate,	(b) How acquired P-Purchase	(c) Date acquired (mo , day, yr.)	(d) Date sold (mo , day, yr.)			
1a	CEE DADE TU COUR	orick warehouse, or common stock, 200 s EDULE	D-Donation	(, day, y)				
b			 					
d								
	(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	l							
b)							
_c	<u> </u>							
_d								
								
	omplete only for assets s	howing gain in column (h) and own			Gains (Col. (h) g			
_	(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	COI.	(k), but not less t Losses (from co			
_ <u>a</u>	·							
_b)							
_ <u>c</u>	:							
<u>_d</u>								
	<u></u>							
		(net capital loss) {	gain, also enter in Part I, line 7 (loss), enter -0- in Part I, line 7	2		-98,239.		
3		n or (loss) as defined in sections 12]				
		, line 8, column (c) (see pages 13 a						
	If (loss), enter -0- in Part I,	line 8,		3				
		nder Section 4940(e) for Redu						
(F	or optional use by domesti	c private foundations subject to the	s section 4940(a) tax on het investi	nent inco	ne.)			
16.	section 4940(d)(2) applies,	leave this part blank						
	section +5+0(d)(2) applies,	icave the part blank						
		the section 4942 tax on the distrib not qualify under section 4940(e).		ase period	i?	Yes X No		
1		ount in each column for each year;		fore mak	ing any entries			
÷	(a)	(b)	(c)	Total India	(d)			
С	Base penod years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	Net value of nonchantable-use assets		Distribution ra (col (b) divided by			
	2008	38,608.	572,890.			0.067392		
	2007	38,079.	743,811.			0.051194		
_	2006	41,385.	786,457.			0.052622		
_	2005	39,848.	779,183.			0.051141		
	2004	39,974.	818,343.			0.048847		
2	Total of line 1, column (d))		2		0.271196		
3		for the 5-year base period - divide						
	number of years the foun	dation has been in existence if less	than 5 years	3		0.054239		
	E-to-the set value of sec	and a stable was according 2000 from	- Bod V Inc 5			630 610		
4	Enter the net value of nor	ncharitable-use assets for 2009 from	m Part X, line 5	4		638,618.		
_	Multiply line 4 by line 3			5		34,638.		
5	Multiply line 4 by line 5			-		34,030.		
6	Enter 1% of net investme	ent income (1% of Part I, line 27b)		6 390				
7	Add lines 5 and 6			7		35,028.		
					- "			
8	Enter qualifying distribution If line 8 is equal to or grant VI instructions on page	eater than line 7, check the box is	n Part VI, line 1b, and complete t	8 hat part	using a 1% ta	31,884.		

P _i a.	TEXT Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 18 of	the ins	tructi	ons)
1a	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1.			歌灣
	Date of ruling or determination letter. 988(attach copy of ruling letter if necessary - see instructions)		Take and	
D	Domestic foundations that meet the section 4940(e) requirements in Part V, check	, <u>-</u>	14. 62. 5	390.
	here ► X and enter 1% of Part I, line 27b			المراجعة الأوافية المراجعة ا المراجعة المراجعة ال
С	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% \int of Part I, line 12, col. (b)	E in the Taylor	7-745-1	# J .4
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 2			
3	Add lines 1 and 2		3	390.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 4			<u>0.</u>
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		3	390.
6	Credits/Payments	神强力	非典	
a	2009 estimated tax payments and 2008 overpayment credited to 2009 6a 479.			
b	Exempt foreign organizations-tax withheld at source 6b 0.			
C	Tax paid with application for extension of time to file (Form 8868) 6c 0.			
đ	Backup withholding erroneously withheld 6d 6d			
7	Total credits and payments Add lines 6a through 6d		4	179.
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached			
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid Enter the amount of line 10 to be Credited to 2010 estimated tax ▶ 89. Refunded ▶ 11			89.
11	Enter the amount of line 10 to be Credited to 2010 estimated tax 89. Refunded 11			
	t VII-A Statements Regarding Activities	IsI		
1 a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it	母二	Yes	No
	participate or intervene in any political campaign?	. 1a		<u> </u>
Ь	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19			
	of the instructions for definition)?	. 1b	r.d. **	X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials	0.2		
	published or distributed by the foundation in connection with the activities.	17.	er er	性には
C	Did the foundation file Form 1120-POL for this year?	. 1c	1 17 5	X = a ^{2.7} 0
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:	113		持續
_	(1) On the foundation \$ (2) On foundation managers. \$	12 Tal	4	
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. > \$	3.		1
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		(Mirit	X.
_	If "Yes," attach a detailed description of the activities.	. 2	漢書かれ	777
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of	7.7	, , , , , , , , , , , , , , , , , , ,	Height Life
•	incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	L. 6 2 6 A	X
4 a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
h	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		X
•	If "Yes," attach the statement required by General Instruction T.	\$ 75	777 Lyb.	
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:	1,6	4, 2,	2 41 2 (3)
•	By language in the governing instrument, or		٠,٠٠٠	
	By state legislation that effectively amends the governing instrument so that no mandatory directions that	17-		
	conflict with the state law remain in the governing instrument?	6	X 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.	7	Х	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the		- 17-	C. Treit
	instructions) TX	1 .		
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	. 8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or	· -		٠, -
	4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page			
	27)? If "Yes," complete Part XIV	. 9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their			
	names and addresses	. 10		X

to all years listed, answer "No" and attach statement - see page 20 of the instructions.)

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
 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?

c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.

enterprise at any time during the year?

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.)

3a Did the foundation hold more than a 2% direct or indirect interest in any business

Form 990-PF (2009)

3b 4a

X No

Pai	rt VII-B Statements Regarding Activities for	or Which Form 4	720 May Be Requ	ired (contil	nued)			
5 a	During the year did the foundation pay or incur any amou	nt to.					16 TE	
	(1) Carry on propaganda, or otherwise attempt to influer	ce legislation (section	4945(e))?	. Yes	X No	325	13 °	海 " K C C C C C C C C C C C C C C C C C C
	(2) Influence the outcome of any specific public election	(see section 4955), o	or to carry on,			F	3	121
	directly or indirectly, any voter registration drive?	•		Yes	X No	接重	離	
	(3) Provide a grant to an individual for travel, study, or off				X No		建 华	14.44.
	(4) Provide a grant to an organization other than a cham				٠٠٠ ب			
	section 509(a)(1), (2), or (3), or section 4940(d)(2)? (. •		Yes	XNo		建二	4. 24. 2. 2. 2. 2. 2. 2. 2. 2. 2. 2. 2. 2. 2.
						######################################	差。正	
	(5) Provide for any purpose other than religious, charital	•			X No		- 4	4
	purposes, or for the prevention of cruelty to children o			. Yes		19.55		27 1,
b	If any answer is "Yes" to 5a(1)-(5), did any of the trans.		•		61 / A	1.5.	EL.	F. A.
	Regulations section 53.4945 or in a current notice regard	=	· · ·	_		• • 5b	6,8° m	وشيرياري
	Organizations relying on a current notice regarding disast	er assistance check h	ere	<i>.</i> '			F 7.74	77
C	If the answer is "Yes" to question 5a(4), does the foundation	tion claim exemption	from the tax		<u> </u>	1,73	4	133
	because it maintained expenditure responsibility for the gr	ant?		. L Yes	X No	194	1	
	If "Yes," attach the statement required by Regulations sect	ion 53 4945-5(d).				9 1 E 4. 1	11.2	. Y.
6a	Did the foundation, during the year, receive any funds, d	irectly or indirectly, to	pay premiums				F 7	1
	on a personal benefit contract?	•		Yes	X No	1	, , , , , ,	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
ь	Did the foundation, during the year, pay premiums, direct			cl?	_	6 b		X
	If "Yes" to 6b, file Form 8870.	,,,			• • • • •	15.0	1. A. V.	1
7 a	At any time during the tax year, was the foundation a par	rty to a prohibited tax	shelter transaction?	Yes	X No	, in the second	F 7 }.	7
	If yes, did the foundation receive any proceeds or have a	•	•	- —				X
_	t VIII Information About Officers, Directors							<u></u>
	and Contractors	·		- •	•	•		
1_	List all officers, directors, trustees, foundation m	anagers and their (b) Title, and average	(c) Compensation	(d) Contribu				
	(a) Name and address	hours per week	(If not paid, enter	employee ber	efit plans	(e) Expension	se acco lowance	unt, BS
		devoted to position		and deferred co	mpensation			
Λ T	TACHMENT 7		-0-])-	_	0-	
<u>VI</u>	TACHMENT /		<u> </u>	· · · · · ·	' —+		-	
				1	1			
								
	- <u>,</u>			L	1			
2	Compensation of five highest-paid employees (ot	her than those inc	luded on line 1 - se	e page 23 c	of the inst	ructions).		
	If none, enter "NONE."			(d) Contribu	itions to			
(8) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	employee	benefit	(e) Expens		
		devoted to position		plans and compens		other al	owance	25
	NONE							
_							-	
				1	ì			
								
				 				
					ı			
					1			
				ļ		·		
	I number of other employees paid over \$50.000							

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

Five highest-paid independent contractors for professional services (see page 2	3 of the instructions). If none,	enter "NC	DNE."
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Com	pensation
NONE			
		<u> </u>	
Total number of others receiving over \$50,000 for professional services		▶	NONE
Part IX-A Summary of Direct Charitable Activities			
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical info of organizations and other beneficianes served, conferences convened, research papers produced, etc.	ormation such as the number	Ехре	enses
1_N/A			
			_
2			
3			
~			
		ĺ	
4			
Part IX-B Summary of Program-Related Investments (see page 23 of the in			
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 a	and 2	Amo	ount
1_N/A			
2			
a			
All other program-related investments. See page 24 of the instructions			
3 NONE			
		<u> </u>	
Total. Add lines 1 through 3	<u></u>	l	

Pa	Minimum Investment Return (All domestic foundations must complete this part. Foreign see page 24 of the instructions.)	gn foundations,	
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,	012¥	
	purposes:		
а	Average monthly fair market value of securities	1a	487,264.
b		1b	161,079.
C		1c	0.
d		1d	648,343.
e	Reduction claimed for blockage or other factors reported on lines 1a and	i E	
	1c (attach detailed explanation)	1	
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Outstand the Office Office Ad	3	648,343.
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25		
	of the instructions)	4	9,725.
5	of the instructions) Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	638,618.
6	Minimum investment return. Enter 5% of line 5	6	31,931.
Pa	Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) privations and certain foreign organizations check here and do not complete this privations.		
1	Minimum investment return from Part X, line 6	1	31,931.
2a	Tax on investment income for 2009 from Part VI, line 5 2a 390.	ta (17	
b	Income tax for 2009. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	390.
3	Add lines 2a and 2b Distributable amount before adjustments Subtract line 2c from line 1	3	31,541.
4	Recoveries of amounts treated as qualifying distributions	4	
5		5	31,541.
6	Add lines 3 and 4 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	31,541.
Pa	art XII Qualifying Distributions (see page 25 of the instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:	2 2 a	
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	31,884.
b	Program-related investments - total from Part IX-B	1b	0.
2	Program-related investments - total from Part IX-B Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.		
		2	0.
3	purposes Amounts set aside for specific charitable projects that satisfy the:	F	
а	Suitability test (prior IRS approval required)	3a	0.
b	Cash distribution test (attach the required schedule)	3b	0.
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	31,884.
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	390.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	31,494.
-	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating w		
	qualifies for the section 4940(e) reduction of tax in those years.		

Рa	Taxiii Undistributed income (see page	20 of the manacho	(13)		
1	Distributable amount for 2009 from Part XI,	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
•	line 7	1 da 20 1 1 1 5 5 7 5 7 5 7 5 7 5 7 5 7 5 7 5 7			31,541.
2	Undistributed income, if any, as of the end of 2009			21, 451.	الله الله الله الله الله الله الله الله
а	Enter amount for 2008 only	್ಕೆ ಕೆ ಈ ಸ್ವಾಪಕ್ಷ ಕ್ರಾಮಿಗಳು ಪ್ರತಿ ಕ್ರಾಮ್ ಪ್ರತಿ ಮೊದಲಾಗಿ ಸ್ಥಾಪಕ್ಷ ಸ್ಥಾಪಕ್ಷ		祖 F 20 - 1 - 4型	The state of the s
b	Total for pnor years 20 07 20 06 20 05		17 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	Fish for for the second of the	= 10 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
3	Excess distributions carryover, if any, to 2009:		1. 是 数个 " 集 公"	· · · · · · · · · · · · · · · · · · ·	一下的 医海绵性炎
a	From 2004		EVERT IN THE	以 公司。2015年	
b	From 2005		75年15年15年		
c	From 2006 0.		国籍,图解主题		114
ď	From 2007 0.			中野社会组 多可足型	
_	From 2008 0.				[月] "我们,"只是你们
•		0.		The said of the said of the	
T	Total of lines 3a through e		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
4	Qualifying distributions for 2009 from Part XII,				
	line 4: ▶ \$ 31,884.			21 461	1
a	Applied to 2008, but not more than line 2a	***	3 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -	21,451.	
ь	Applied to undistributed income of prior years (Election	30 10 10 10 10 10 10 10 10 10 10 10 10 10			
	required - see page 26 of the instructions)	T 1 .			1 72 1 75.1
c	Treated as distributions out of corpus (Election required - see page 26 of the instructions)				
	Applied to 2009 distributable amount		ا يُ الله الله الله الله الله الله الله الل	19 17 THE	10,433.
•	*****	0.	1 - 1 - 4 - 1 - 1 - 1 - 1 - 1 - 1 - 1 -	是表述成功。	1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1
e	Remaining amount distributed out of corpus Excess distributions carryover applied to 2009	0.	in the state of the state of the		0.
5	(If an amount appears in column (d), the same	L	را به فراد از	The state of the s	1 2 0 6 2 1 1 2 2 6 6 7
	amount must be shown in column (a).)		医外腺性 计数据		
6	Enter the net total of each column as			"是""是""是"	
	indicated below:		医马基斯氏 唐野 亚二	高速上海市市	
а	Corpus. Add tines 3f, 4c, and 4e. Subtract line 5	0.	州南北城(山) 一、五、五、五、五、五、五、五、五、五、五、五、五、五、五、五、五、五、五、五	は、本事はいるいとは、	第一次"
ь	Prior years' undistributed income Subtract			1、最初期,是100万亿	
_	line 4b from line 2b	Harfy IR.			
C	Enter the amount of prior years' undistributed	· 大學 · · · ·			- ' '- '
	income for which a notice of deficiency has been	1 to		, ,	
	issued, or on which the section 4942(a) tax has been previously assessed	man in the section of the		,	the second second
	• •	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			
đ	Subtract line 6c from line 6b. Taxable				
	amount - see page 27 of the instructions Undistributed income for 2008. Subtract line	1 - 2 - 27 UP	± - ',		- 1
·	4a from line 2a. Taxable amount - see page				
	27 of the instructions	1, 3, 4		Her Strain	· · · · · · · · · · · · · · · · · · ·
f	Undistributed income for 2009. Subtract lines			1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
·	4d and 5 from line 1. This amount must be	定論した。	' ' ' '		21 100
	distributed in 2010	15、安持。			21,108.
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		, -		1.
	instructions)				· * * * * *
8	Excess distributions carryover from 2004 not			1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
	applied on line 5 or line 7 (see page 27 of the		" "		
_	instructions)				
9	Excess distributions carryover to 2010.	l o.			
	Subtract lines 7 and 8 from line 6a	Į			
	Analysis of line 9:		, , ;	· · · · · · · · ·	1: :
8	• • • • • • • • • • • • • • • • • • • •	" "		1 .	
Þ			1		1
C	Excess from 2007	1 1 2.	1 .		
d	Excess from 2008				
e	Excess from 2009 0 .	<u> </u>		<u> </u>	L

Form	n 990-PF (2009)			74-24	143002	Page 10
Pa	rt XIV Private Oper	rating Foundations (see page 27 of the	instructions and Par	t VII-A, question 9)	NOT APPLICABLE
1 a	If the foundation has	received a ruling or d	etermination letter tha	t it is a private opera	iting	
	foundation, and the ruling	g is effective for 2009, e	nter the date of the ruling		. ▶	
b	Check box to indicate wh				4942(j)(3) or 4942(j)(5)
_		Tax year		Prior 3 years		T
2 a	Enter the lesser of the ad- justed net income from Part	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
	for the minimum investment	(7)	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	(-,	(1)	
	return from Part X for each year listed					
						
D	85% of line 2a		<u> </u>			
C	Qualifying distributions from Part					
d	XII, line 4 for each year listed . Amounts included in line 2c not			_		
u	used directly for active conduct					
	of exempt activities					
9	Qualifying distributions made directly for active conduct of					
	exempt activities Subtract line					
3	2d from line 2c					
3	Complete 3a, b, or c for the atternative test relied upon					
a	"Assets" alternative test - enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section			1		
	4942(j)(3)(B)(i)					
b	"Endowment" alternative test-					,
	enter 2/3 of minimum invest- ment 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	į				
	toans (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)					
	port from an exempt					
	organization		·			
Pa	· ·	ary Information (C	omplete this part	only if the founda	tion had \$5,000	or more in assets
-	at any time o	during the year - sec	page 28 of the in	structions.)	, , , , , , , , , , , , , , , , ,	
1	Information Regarding	g Foundation Manage	rs:	•		
a	List any managers of			than 2% of the total	contributions receiv	ed by the foundation
	before the close of any	tax year (but only if th	ey have contributed n	nore than \$5,000). (Se	e section 507(d)(2).)	• • • • • • • • • • • • • • • • • • • •
	W.R. BURGES	ss				
_	List any managers of		245 10% or more of	the stock of a corne	ration (or an equally	lorge parties of the
D	ownership of a partner					large portion of the
	Ownership of a partitor	ompor outer entity, or	William the realization	mas a 1070 or greater	ii itoroot	
	N/A					
2	Information Regarding	g Contribution. Grant	Gift Loan Scholarsh	ip. etc Programs:		
-	<u> </u>	_		• •	-blii	
	Check here ► X if the unsolicited requests for	ne toungation only r or funds if the found	nakes contributions of	to preselected chariti	able organizations a	ing goes not accept
	organizations under ot				ZO OF THE HISTIDCH	nis) to iliulyludais of
_	_					
а	The name, address, a	na telephone number	of the person to whon	n applications should be	e addressed:	
_			*** * * * * * * * * * * * * * * * * * *			
b	The form in which app	lications should be sul	omitted and information	on and materials they s	snould include:	
	<u> </u>					
C	Any submission deadle	nes:				
						
d	Any restrictions or li	mitations on awards,	such as by geogra	phical areas, charitat	ble fields, kinds of	institutions, or other
	factors:					

Form 990-PF (2009)			74-2443002	Page 1
Part XV Supplementary Information (co	ontinued)			
3 Grants and Contributions Paid Duri	ng the Year or App			
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)	any foundation manager or substantial contributor	recipient	contribution	7,1104111
a Paid during the year				
AMMA CUMBNIM O				
ATTACHMENT 8				
		İ		
		1		
			İ	
			1	
Tatal	<u> </u>	<u> </u>		30,000.
b Approved for future payment	<u> </u>	: · · · · · ·		30,000.
a ripprotod for latera paymon.				
		İ		
Total	<u> </u>		▶ 3b	

nter gross	amounts unless otherwise indicated.	Unrela	ated business income	Excluded by	section 512, 513, or 514	(e) Related or exempt
1 Progran	n service revenue:	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See page 28 of the instructions.)
a						
b						
c						
d						
e						
f						- <u>-</u>
-	s and contracts from government agencies					
Membe	rship dues and assessments			1.4	11 077	
	on savings and temporary cash investments			14	11,877.	
	ds and interest from securities	'm' 'der T' .	Kon a laste du et elle		27,096.	47.7
		- 16 1 1 2 2 2 1 1 1 1 1 1 1 1 1 1 1 1 1	第一年 mana 本記 と を まっちょ	1,4,4,	经上海中分類型。	्रेष्ट्रिक्ट्र अस्तुर्वे अस्तुर
	ot-financed property			 		
	debt-financed property			 		
	al income or (loss) from personal property			-		·········
	nvestment income			18	-98,239.	
	(loss) from sales of assets other than inventory			10	-30,233.	
	ome or (loss) from special events					
	profit or (loss) from sales of inventory					
	evenue: a		· · · · · · · · · · · · · · · · · · ·			
b						
				-		
				 		<u> </u>
e	1 Add ad a a (1) (4) and (2)	17 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		 福度1月学17,0	-59 266	
2 Subtota	al. Add columns (b), (d), and (e)			をまずる() 5 ² 7。 **no.() ()		
Subtota Total. A	add line 12, columns (b), (d), and (e)					
Subtotal Total A ee works	add line 12, columns (b), (d), and (e)	to verify calcu	ulations) complishment of Ex	empt Purp	13	-59,266
Subtotal Total A ee works	add line 12, columns (b), (d), and (e)	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59,266
Subtota Total. A ee works art XV ine No.	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59,266
Subtota Total. A ee works art XV ine No.	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59,266
Subtota Total. A ee works art XV ine No.	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59,266
Subtotal Ace works art XVI	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59,266
Subtotal Ace works art XVI	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59, 266
Subtotal Ace works art XVI	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59,266
Subtotal Ace works art XVI	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59,266
Subtotal Ace works art XVI	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59,266
Subtotal Ace works art XVI	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59, 266
Subtotal Ace works art XVI	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59,266
Subtota Total. A ee works art XV ine No.	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59,266
Subtota Total. A ee works art XVI ine No.	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59,266
Subtotal Ace works art XVI	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59,266
Subtotal Total. A ee works art XVI	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59,266
Subtotal Ace works art XVI	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59,266
Subtotal Total. A ee works art XVI	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59, 266
Subtotal Total. A ee works art XVI	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59, 266
Subtotal Total. A ee works art XVI	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59, 266
Subtotal Total A ee works art XV ine No.	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59, 266
Subtotal Total A ee works art XVI	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59, 266
Subtotal Total A ee works art XV ine No.	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59, 266
2 Subtota 3 Total A See works Part XVI Line No.	Add line 12, columns (b), (d), and (e). Theet in line 13 instructions on page 28 to the et in line 13 instructions on page 28 to the Relationship of Activities Explain below how each activities accomplishment of the for	to verify calcust to the Ac	ulations) complishment of Exc	empt Purp	oses (e) of Part XVI-A con	-59, 266

Pa	rt_XVI			Regarding Inizations	I ransters	io and	ransad	ctions	and R	telatio	onsh	ips W	ith N	lonc	harr	table
1	Did t			y or indirectly	engage in	any of the	following	with :	any othe	er orga	anizatio	on desc	ribed	± ,11±	Yes	No
	ın se	ction 501(c)	of the C	ode (other than	n section 50	1(c)(3) orga	nizations)							7.jap		
а	organ: Trans	izations? fers from the	reporting f	oundation to a n	oncharitable e	exempt organiz	zation of.							2031	是温	
	(1) C	ash												1a(1)	ı	Х
														1a(2)		X
b	Other	transactions.													虚型	· ·
	(1) S	ales of assets	to a noncl	haritable exempt	organization .									1b(1)		Х
	(2) P	urchases of a	ssets from	a noncharitable	exempt organiz	zation								1b(2)		X
	(3) R	ental of facilit	ies, equipm	ent, or other asse	ets									1b(3)	<u> </u>	Х
	(4) R	eimbursemen	t arrangeme	ents										1b(4)		X
																X
				or membership or												X
C				nt, mailing lists, o											<u> </u>	X
d				the above is '			_					-				
		_		assets, or sen	_	-	•									
	value	in any tran	isaction of	r sharing arran	igement, sho	w in colum	n (d) th	e value	of the	goods	, othe	er assets	, Or	service	es re	ceived
/ 0\	Line no	(b) Amount	involved	(c) Name of	nonchantable e	vemet emenize	tion	(d) Dec	scription of	f transfe	re trans	actions a	nd ebar			
(a)	LIITO IIIO	N/A	myoryou	(c) Name of		Actinpt Organiza	10011	N/A	scription of	i ti di isic	io, uaiis	SACUO115, B	IIU BIIAI	ing ana	ingerne	1113
							`				_					
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								·- <u>-</u>								
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		<u> </u>		<u> </u>												
2a				indirectly affilia				ore tax-	exempt o	organiz	ations	describe	ed in r	_	Γ.	ฮ
		• •	•	ner than section :	501(c)(3)) or i	n section 527	⁷ 7						L	Ye	s [_	Ŋ No
<u>b</u>	If "Yes	s," complete t	ne tollowing forganization		(6)	Type of omen			_		1 Dogge	introp of s				
		(a) Name	organization	<u> </u>	(6)	Type of organ	Zauon	-+			Desci	iption of i	CIAUCIIS	пф		
	_															
								-+								
_						··		-+								
			7/1													
	Under	penalties of pe	ury I deci	are that I have ex	amined this rel	turn, including	accompan	ying sche	dules and	statem	ents, ar	nd to the	best o	my k	nowled	ge and
	belief,	it is true corre	and com	plete Declaration	of preparer (oth	er than taxpay	yer or fiduo /	ciary) is b	ased on al	il inform	ation o	f which p	reparer	has ar	ny kno	wledge
		/ <i>X</i>	\mathcal{L}_{1}	NC \ 7	10	./ (B		_ [//.	5/ / 0		6-1	MH	4			
စ္	Sı	gnature of offic	er or trustee					Date		- 7-	Title					
2			1,,		$\overline{}$		Date	7	Charl	. :4				identif		
Sign Here	& ≥	Preparer's	LUM.	()	12	o non	J., L.	1	Check self-e	cit mploye	d ▶☐			e Signa he ınstr		
Sign	Paid Preparer's Use Only	signature				00 1977	11/05	110				POC)533	123		·
l	P 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9	Firm's name				MCDANIE		., P.	С.	\Box	EN >	74-2	642	384		
	ر ہے	self-employe			N. MESA,	SUITE F	3-100	_								
		and ZIP code	e	EL PA	SO, TX			_79	902-1	498	Phone	no. 91	15-5	42-1	733	_

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

i		INS AND LO			NVESII	P	Date Date	Date sold
Kind of				ription		D	acquired	Date 5010
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
75,000.		75,000 CAPM. 75,000.					09/09/2008	09/17/2009
49,313.		3,937 SHS C 99,127.	ITIGROUP C	AP 6% TRUPS			10/29/2004 -49,814.	07/09/2009
1,180.		1,000 SHS F	EDL NATL MI	G ASSN 5.5%	i		02/14/2005 -48,425.	12/03/2009
TOTAL GAIN(L	oss)						-98,239.	
	:							
					:			;
			- ·			Ц		

ATTACHMENT

- INTEREST ON TEMPORARY CASH INVESTMENTS PART I FORM 990PF,

	NET	INVESTMENT	INCOME	11,87
REVENUE	AND	EXPENSES	PER BOOKS	11,877.
			DESCRIPTION	INTEREST INCOME - WELLS FARGO

11,877.

11,877.

TOTAL

11,877.

7039

ATTACHMENT 2

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

	NET	INVESTMENT	INCOME		. 1, 096.
REVENUE	AND	EXPENSES	PER BOOKS	0	.980,12
			DESCRIPTION	5	DIVIDENDS - WELLS FARGO

27,096.

27,096.

TOTAL

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	TTACH
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TACHMENT.
AT

FORM 990PF, PART I - LEGAL FEES

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE
LEGAL SERVICES		234.			234.
	TOTALS	234.	0	0	234.

234.

234.

•

B4R00Y P178 11/2/2010

PART I - ACCOUNTING FEES FORM 990PF,

CHARITABLE	1,650.	1,650.
ADJUSTED NET INCOME		0.
NET INVESTMENT INCOME		0
REVENUE AND EXPENSES PER BOOKS	1,650.	1,650.
		TOTALS
DESCRIPTION	ACCOUNTING FEES	

PAGE 19

FORM 990PF, PART I - TAXES

REVENUE AND

DESCRIPTION

EXPENSES PER BOOKS

INCOME TAX PAYMENTS

380.

TOTALS

380.

7039

THE W.R. BURGESS FOUNDATION

PART II - CORPORATE BONDS

FORM 990PF,

ENDING BOOK VALUE	49,985. 10,201. 25,405. 20,000. 63,705. 49,405. 25,576. 28,067. 51,005. 50,886. 49,906. 25,246. 25,246. 25,246. 25,246. 25,246. 25,246. 25,246. 25,246. 25,246.
BEGINNING BOOK VALUE	49,985. 10,201. 49,605. 25,405. 20,000. 63,705. 49,405. 25,576. 25,105. 25,886. 49,906. 25,246. 25,685. 75,000.
DESCRIPTION	ROYAL BK SCOTLAND GRP PLC 6.48 CITIGROUP CAPITAL XI 68 HSCB FINANCE CORP 68 11-30-33 FANNIE MAE 5.5% PFD ROYCE VALUE TRUST INC 5.9% EATON VANCE FUND GABELLI DIV & INCOME TRUST GENERAL ELECTRIC 6.45% GABELLI EQTY TR SER F 11-10-11 DEUTSCHE BANK CONTINGENT CAP FIFTH THIRD CAP TRUST 8.875% ING GROEP NV PERPETUAL HYBRID BANK OF AMERICA DEP SHS REP BANK OF AMERICA DEP SHS REP JP MORGAN CHASE & CO, NON CUM WELLS FARGO CAP XIV CAPMARK BANK MIDVALE UT CTF FIFTH THIRD CAPITAL TRUST VII HSBC FINANCE CORP. 6% PIMCO FDS LLOYDS BKG GRP PLC 7.75%

9

ATTACHMENT

7039

PAGE 22

FORM 990PE, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

NAME AND ADDRESS

TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION

> 1001 ARBOR LAKE DRIVE NAPLES, FL 34110 W.R. BURGESS

PRES/SEC

CLYDE A. PINE, JR. 100 N. STANTON

EL PASO, TX 79901-1448 SUITE 1700

VP/TREAS

WINTER GARDEN, FL 34787 JEFFREY S. BURGESS 1343 MARBLE CREST WAY

TRUSTEE

GRAND TOTALS

ATTACHMENT

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ATTACHMENT 8

XEAR
THE
DURING
PAID
CONTRIBUTIONS P
GRANTS AND C
PART XV
FORM 990PE,

	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR		
	AND		
RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
LOOMIS CHAFFEE SCHOOL ANNUAL FUND	NONE	CHARITABLE DONATION	2,000.
4 BATCHELDER ROAD	501(C)(3)		
WINDSOR, CT 06095			
NEW MEXICO BOY'S & GIRL'S RANCHES	NONE	CHARITABLE DONATION	1,000.
6209 HENDRIX ROAD NE, 2 FL	501(C)(3)		
ALBUQUERQUE, NM 87110			
FREEDOM ALLIANCE	NONE	CHARITABLE DONATION	1,000.
22570 MARKY CT SUITE 240	501(C)(3)		
DULLAS, VA 20166			
LOOMIS CHAFFEE SCHOOL RSB SCHOLAR	NONE	CHARITABLE DONATION	20,000.
4 BATCHELDER ROAD	501(C)(3)		
WINDSOR, CT 06095			
EVERY NATION MINISTRIES	NONE	CHARITABLE DONATION	5,000.
P.O. BOX 1797	501(C)(3)		
BRENTWOOD, IN 37024-1787			
BONITA FIRE DISTRICT	NONE	CHARITABLE DONATION	1.000.
ALTO, NM 88312	501(C)(3)		

TOTAL CONTRIBUTIONS PAID

30,000.

5 00:55 PM