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## Return of Private Foundation

OMB No 1545-0052

2009

Department of the Treasury  
Internal Revenue Serviceor Section 4947(a)(1) Nonexempt Charitable Trust  
Treated as a Private Foundation

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

For calendar year 2009, or tax year beginning JUL 1, 2009, and ending JUN 30, 2010

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

Use the IRS label Otherwise, print or type. See Specific Instructions	Name of foundation <b>ANDERSON FOUNDATION</b>		A Employer identification number <b>91-6031724</b>
	Number and street (or P.O. box number if mail is not delivered to street address) <b>9420 N.E. 27TH</b>		B Telephone number <b>(425) 454-7781</b>
	City or town, state, and ZIP code <b>BELLEVUE, WA 98004</b>		C If exemption application is pending, check here <input type="checkbox"/>
	H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1 Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ <b>20,948,486.</b> (Part I, column (d) must be on cash basis)		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		162,480.	162,480.		STATEMENT 1
4 Dividends and interest from securities		524,713.	524,713.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		<545,946.>			
b Gross sales price for all assets on line 6a		4,064,988.			
7 Capital gain net income (from Part IV, line 2)			0.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		<22,096.>	<22,096.>		STATEMENT 3
12 Total. Add lines 1 through 11		119,151.	665,097.		
13 Compensation of officers, directors, trustees, etc.		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 4		7,850.	7,850.		0.
c Other professional fees					
17 Interest					
18 Taxes STMT 5		10,241.	0.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 6		2,203.	2,203.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		20,294.	10,053.		0.
25 Contributions, gifts, grants paid		1,760,000.			1,760,000.
26 Total expenses and disbursements. Add lines 24 and 25		1,780,294.	10,053.		1,760,000.
27 Subtract line 26 from line 12		<1,661,143.>			
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)			655,044.		
c Adjusted net income (if negative, enter -0-)				N/A	

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**Part II Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing	76,869.	24,757.	24,757.
	2 Savings and temporary cash investments	123,504.	327,681.	327,681.
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶	14,564.		
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations			
	b Investments - corporate stock STMT 7	14,428,568.	14,109,773.	17,195,800.
	c Investments - corporate bonds STMT 8	4,453,604.	2,973,755.	3,400,248.
11 Investments - land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶)				
<b>16 Total assets (to be completed by all filers)</b>	<b>19,097,109.</b>	<b>17,435,966.</b>	<b>20,948,486.</b>	
<b>Liabilities</b>	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
<b>23 Total liabilities (add lines 17 through 22)</b>	<b>0.</b>	<b>0.</b>		
<b>Net Assets or Fund Balances</b>	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	0.	0.	
28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds	19,097,109.	17,435,966.		
<b>30 Total net assets or fund balances</b>	<b>19,097,109.</b>	<b>17,435,966.</b>		
<b>31 Total liabilities and net assets/fund balances</b>	<b>19,097,109.</b>	<b>17,435,966.</b>		

**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	19,097,109.
2 Enter amount from Part I, line 27a	2	<1,661,143.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	17,435,966.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	17,435,966.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b SEE ATTACHED STATEMENTS			
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			
b			
c			
d			
e 4,064,988.		4,610,934.	<545,946.>

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			
b			
c			
d			
e			<545,946.>

  

2 Capital gain net income or (net capital loss)	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;">           If gain, also enter in Part I, line 7            If (loss), enter -0- in Part I, line 7         </div> <div style="margin-left: 10px;">           2         </div> </div>	<545,946.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; padding-left: 5px;">           If gain, also enter in Part I, line 8, column (c)            If (loss), enter -0- in Part I, line 8         </div> <div style="margin-left: 10px;">           3         </div> </div>	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	1,693,874.	21,826,437.	.077607
2007	1,750,000.	33,846,585.	.051704
2006	1,941,390.	33,795,341.	.057445
2005	1,800,363.	32,679,754.	.055091
2004	1,660,135.	29,126,065.	.056998

  

2 Total of line 1, column (d)	2	.298845
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	.059769
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	22,793,060.
5 Multiply line 4 by line 3	5	1,362,318.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	6,550.
7 Add lines 5 and 6	7	1,368,868.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions	8	1,760,000.

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	6,550.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	6,550.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	6,550.
6	Credits/Payments		
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	10,874.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	10,874.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	4,324.
11	Enter the amount of line 10 to be Credited to 2010 estimated tax <input checked="" type="checkbox"/> 4,324. Refunded <input type="checkbox"/>	11	0.

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> WA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

**Part VII-A Statements Regarding Activities** (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► BARBARA LAWRENCE Located at ► 9420 N.E. 27TH, BELLEVUE, WA	Telephone no	► 425-454-7781	
		ZIP+4	► 98004	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year		► 15	N/A

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception - Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?		1c
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years ►		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

6b

X

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation.**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
BARBARA LAWRENCE 9420 N.E. 27TH BELLEVUE, WA 98004	VICE PRESIDENT 1.00	0.	0.	0.
KATHERINE C. MURRAY 537 10TH W. KIRKLAND, WA 98033	SECRETARY/TREASURER 1.00	0.	0.	0.

**2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."**

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

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

0

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

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

0

**Part IX-A** Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

**Part IX-B** Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
<b>Total.</b> Add lines 1 through 3	0.

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**Part X** Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	22,232,467.
b	Average of monthly cash balances	1b	907,695.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	23,140,162.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	23,140,162.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	347,102.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	22,793,060.
6	Minimum investment return. Enter 5% of line 5	6	1,139,653.

**Part XI** Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part)

1	Minimum investment return from Part X, line 6	1	1,139,653.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	6,550.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	6,550.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,133,103.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,133,103.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,133,103.

**Part XII** Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	1,760,000.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,760,000.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	6,550.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,753,450.

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

**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				1,133,103.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004	217,562.			
b From 2005	205,649.			
c From 2006	288,843.			
d From 2007	90,157.			
e From 2008	614,804.			
f Total of lines 3a through e	1,417,015.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 1,760,000.				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				1,133,103.
e Remaining amount distributed out of corpus	626,897.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,043,912.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	217,562.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	1,826,350.			
10 Analysis of line 9				
a Excess from 2005	205,649.			
b Excess from 2006	288,843.			
c Excess from 2007	90,157.			
d Excess from 2008	614,804.			
e Excess from 2009	626,897.			



<b>Part XV</b>	<b>Supplementary Information</b> (continued)
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### **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)				
<b>a</b> <i>Paid during the year</i>				
SEE STATEMENT 9				
<b>Total</b>			<b>3a</b>	1760000.
<b>b</b> <i>Approved for future payment</i>				
NONE				
<b>Total</b>			<b>3b</b>	0.

**Part XVI-A      Analysis of Income-Producing Activities**

**Enter gross amounts unless otherwise indicated**

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
<b>1</b> Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
<b>2</b> Membership dues and assessments					
<b>3</b> Interest on savings and temporary cash investments			14	162,480.	
<b>4</b> Dividends and interest from securities			14	524,713.	
<b>5</b> Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
<b>6</b> Net rental income or (loss) from personal property					
<b>7</b> Other investment income			18	<22,096.>	
<b>8</b> Gain or (loss) from sales of assets other than inventory			18	<545,946.>	
<b>9</b> Net income or (loss) from special events					
<b>10</b> Gross profit or (loss) from sales of inventory					
<b>11</b> Other revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
<b>12</b> Subtotal. Add columns (b), (d), and (e)		0.		119,151.	0.
<b>13</b> Total. Add line 12, columns (b), (d), and (e)				119,151.	119,151.

(See worksheet in line 13 instructions to verify calculations )

**Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes**

[illegible]

**Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

- |          |   | Yes | No |
|----------|---|-----|----|
| <b>1</b> | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?   |     |    |
| <b>a</b> | Transfers from the reporting foundation to a noncharitable exempt organization of   |     |    |
|          | (1) Cash  |     | X  |
|          | (2) Other assets  |     | X  |
| <b>b</b> | Other transactions  |     |    |
|          | (1) Sales of assets to a noncharitable exempt organization  |     | X  |
|          | (2) Purchases of assets from a noncharitable exempt organization  |     | X  |
|          | (3) Rental of facilities, equipment, or other assets  |     | X  |
|          | (4) Reimbursement arrangements  |     | X  |
|          | (5) Loans or loan guarantees  |     | X  |
|          | (6) Performance of services or membership or fundraising solicitations  |     | X  |
| <b>c</b> | Sharing of facilities, equipment, mailing lists, other assets, or paid employees  |     | X  |
| <b>d</b> | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received |     |    |

[illegible]

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

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

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Sign Here	Signature of officer or trustee <i>Barbara Lawrence</i>		Date	Title	
	Paid Preparer's Use Only	Preparer's signature ROSS MCIVOR CPA	Date 11/01/10	Check if self-employed <input checked="" type="checkbox"/>	Preparer's identifying number
Firm's name (or yours if self-employed), address, and ZIP code MCIVOR CONSULTING PLLC PO BOX 52986; 2050 112TH AVE NE #130 BELLEVUE, WA 98015-2986				EIN 425-450-0585	

Form **990-PF** (2009)

ANDERSON FOUNDATION

**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1a	1,000SHS ISHARES TRUST IBOX \$ INVEST OP INV	P	01/08/09	08/21/09
b	5,000SHS FX ENERGY INC	P	10/20/05	09/03/09
c	5,000SHS FX ENERGY INC	P	10/20/05	09/04/09
d	5,000SHS FX ENERGY INC	P	12/20/05	09/04/09
e	5,000SHS FX ENERGY INC	P	10/27/06	09/04/09
f	5,000SHS WAL-MART STORES INC	P	01/08/09	09/21/09
g	100,000SHS CITICORP MTG SECURITIES	P	11/17/06	10/09/09
h	150,000SHS CITICORP MORTGAGE SECUR TRUST 6/25/20	P	11/17/06	01/05/10
i	18,000SHS BANK OF AMERICA CORP	P	07/18/03	01/28/10
j	2,000SHS BANK OF AMERICA CORP	P	04/15/04	01/28/10
k	8,000SHS EXPEDITORS INT'L OF WASH INC SOL	P	11/07/07	01/28/10
l	10,000SHS GENERAL ELECTRIC CO SOL	P	09/15/09	01/28/10
m	10,000SHS GENERAL ELECTRIC CO SOL	P	09/16/09	01/28/10
n	200,000SHS GOLDMAN SACHS CORP	P	01/31/00	01/28/10
o	5,000SHS PETROLEO BRASILEIRO SA	P	05/01/09	03/25/10

(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 103,195.		101,120.	2,075.
b 15,302.		49,750.	<34,448.>
c 15,757.		49,750.	<33,993.>
d 15,756.		45,750.	<29,994.>
e 15,756.		28,699.	<12,943.>
f 252,538.		256,739.	<4,201.>
g 42,647.		110,553.	<67,906.>
h 90,478.		168,225.	<77,747.>
i 270,355.		742,095.	<471,740.>
j 30,039.		80,398.	<50,359.>
k 274,601.		383,396.	<108,795.>
l 160,195.		161,256.	<1,061.>
m 160,195.		170,606.	<10,411.>
n 200,000.		198,510.	1,490.
o 221,907.		175,274.	46,633.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			2,075.
b			<34,448.>
c			<33,993.>
d			<29,994.>
e			<12,943.>
f			<4,201.>
g			<67,906.>
h			<77,747.>
i			<471,740.>
j			<50,359.>
k			<108,795.>
l			<1,061.>
m			<10,411.>
n			1,490.
o			46,633.

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
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8 }	3

ANDERSON FOUNDATION

**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1a 150,000SHS CITICORP MORTGAGE SECURITIES		P	11/17/06	04/13/10
b 5,558SHS BP PLC SPONS ADR		P	01/08/70	05/18/10
c 6,600SHS ISHARES TR S&P EUROPE 350		P	03/19/03	05/18/10
d 2,000SHS ISHARES TRUST MSCI EMERGING MKTS IND FD		P	07/26/05	05/18/10
e 3,000SHS ISHARES TRUST MSCI EMERGING MKTS IND FD		P	01/24/06	05/18/10
f 200,000SHS KRAFT FOODS, INC		P	10/29/08	05/21/10
g 200,000SHS AMERICAN EXPRESS CR CORP		P	01/27/09	05/21/10
h 200,000SHS CATERPILLAR INC		P	12/03/08	05/21/10
i 250,000SHS CATERPILLAR INC		P	04/17/09	05/21/10
j 4SHS BERSHIRE HATHAWAY INC-DEL CL A		P	10/08/08	06/16/10
k				
l				
m				
n				
o				

(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 110,162.		170,655.	<60,493.>
b 253,158.		103,963.	149,195.
c 217,357.		147,576.	69,781.
d 76,696.		50,409.	26,287.
e 115,045.		97,060.	17,985.
f 223,750.		191,326.	32,424.
g 216,783.		196,454.	20,329.
h 235,011.		201,555.	33,456.
i 287,086.		248,215.	38,871.
j 461,219.		481,600.	<20,381.>
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			<60,493.>
b			149,195.
c			69,781.
d			26,287.
e			17,985.
f			32,424.
g			20,329.
h			33,456.
i			38,871.
j			<20,381.>
k			
l			
m			
n			
o			

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	<545,946.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8 }	3	N/A



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

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SOURCE	AMOUNT
KINDER MORGAN PARTNERSHIP K-1	1,686.
RBC DAIN RAUSCHER	160,580.
US TREASURY	69.
WELLS FARGO CHECKING	17.
WELLS FARGO SAVINGS	128.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	162,480.

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FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
KINDER MORGAN PARTNERSHIP K-1	135.	0.	135.
RBC DAIN RAUSCHER	524,578.	0.	524,578.
TOTAL TO FM 990-PF, PART I, LN 4	524,713.	0.	524,713.

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FORM 990-PF OTHER INCOME STATEMENT 3

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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
KINDER MORGAN PARTNERSHIP	<48,881.>	<48,881.>	
NET AMORT OF DISC/PREMIUMS ON			
SECURITIES	13,177.	13,177.	
CLASS ACTION SETTLEMENT	13,608.	13,608.	
TOTAL TO FORM 990-PF, PART I, LINE 11	<22,096.>	<22,096.>	

FORM 990-PF	ACCOUNTING FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
LEGAL/ACCOUNTING FEES	7,850.	7,850.		0.	
TO FORM 990-PF, PG 1, LN 16B	7,850.	7,850.		0.	

FORM 990-PF	TAXES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES	10,241.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	10,241.	0.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FILING AND PUBLICATION TRUSTEE / INVESTMENT MANAGEMENT FEES	110. 2,093.	110. 2,093.		0. 0.	
TO FORM 990-PF, PG 1, LN 23	2,203.	2,203.		0.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	7
DESCRIPTION			BOOK VALUE	FAIR MARKET VALUE
COMMON STOCK			13,606,706.	16,529,300.
PARTNERSHIPS			503,067.	666,500.
TOTAL TO FORM 990-PF, PART II, LINE 10B			14,109,773.	17,195,800.

FORM 990-PF	CORPORATE BONDS	STATEMENT	8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
CORPORATE BONDS	2,973,755.	3,400,248.	
TOTAL TO FORM 990-PF, PART II, LINE 10C	2,973,755.	3,400,248.	

FORM 990-PF	GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR	STATEMENT	9
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RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
AMARA 3300 E UNION STREET SEATTLE, WA 98122	NONE SOCIAL SERVICE	509(A)(1)	40,000.
BELLEVUE SCHOOLS FOUNDATION 12111 NE 1ST STREET, STE 320 BELLEVUE, WA 98004	NONE EDUCATION	509(A)(1)	10,000.
BOYER CHILDREN'S CLINIC 1850 BOYER AVENUE E SEATTLE, WA 98112	NONE EDUCATION	509(A)(1)	20,000.
CAMP KOREY 28901 NE CARNATION FARM ROAD CARNATION, WA 98014	NONE SOCIAL SERVICE	509(A)(1)	5,000.
CAMPFIRE BOYS & GIRLS 1404 CENTRAL AVENUE S KENT, WA 98032	NONE SOCIAL SERVICE	509(A)(1)	10,000.
CHILD CARE RESOURCES 1225 SOUTH WELLER SEATTLE, WA 98144	NONE SOCIAL SERVICE	509(A)(1)	10,000.

· ANDERSON FOUNDATION

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CHILDHAVEN 316 BROADWAY SEATTLE, WA 981225325	NONE SOCIAL SERVICE	509(A)(1)	50,000.
CHILDREN'S HOSPITAL MEDICAL CENTER 4800 SANDPOINT WAY NE SEATTLE, WA 98195	NONE HEALTH & MEDICINE	509(A)(1)	100,000.
COLLEGE SUCCESS FOUNDATION 1605 NW SAMMAMISH ROAD, STE 100 ISSAQUAH, WA 98027	NONE EDUCATION	509(A)(1)	25,000.
EASTSIDE PREPARATORY SCHOOL 10635 NE 38TH PLACE KIRKLAND, WA 98033	NONE EDUCATION	509(A)(1)	15,000.
EVERGREEN HEALTH CARE FOUNDATION 12910 TOTEM LAKE BOULEVARD NE KIRKLAND, WA 98034	NONE HEALTH & MEDICINE	509(A)(1)	50,000.
FRED HUTCHINSON CANCER RESEARCH FOUNDATION 1100 FAIRVIEW AVENUE N SEATTLE, WA 98109	NONE RESEARCH, HEALTH & MEDICINE	509(A)(1)	100,000.
HEARING, SPEECH & DEAFNESS CENTER 1625 19TH AVENUE SEATTLE, WA 98122	NONE SOCIAL SERVICE	509(A)(1)	10,000.
HIGH LAKES PTA 2500 NW HIGH LAKES LOOP BEND, OR 97701	NONE SOCIAL SERVICE	509(A)(1)	5,000.
INDEPENDENT COLLEGES OF WASHINGTON 600 STEWART STREET, STE 600 SEATTLE, WA 98101	NONE EDUCATION	509(A)(1)	100,000.
KENWOOD CHURCH 9637 CHANNING ROW KENWOOD, CA 95476	NONE RELIGIOUS	509(A)(1)	10,000.

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KINDERING CENTER 16120 NE 8TH STREET BELLEVUE, WA 98008	NONE EDUCATION	509(A)(1)	25,000.
MULTIPLE SCLEROSIS-KING COUNTY 753 N. 35TH STREET, STE 208 SEATTLE, WA 98103	NONE RESEARCH, HEALTH & MEDICINE	509(A)(1)	10,000.
NORTHWEST KIDNEY FOUNDATION 700 BROADWAY SEATTLE, WA 98122	NONE RESEARCH, HEALTH & MEDICINE	509(A)(1)	10,000.
NORTHWEST SCHOOL FOR THE HEARING IMPAIRED 15303 WESTMINISTER WAY N. SEATTLE, WA 98133	NONE EDUCATION	509(A)(1)	20,000.
OLIVE CREST 515 116TH AVENUE NE, STE 174 BELLEVUE, WA 98004	NONE SOCIAL SERVICE	509(A)(1)	25,000.
OVERLAKE HOSPITAL FOUNDATION 1035 116TH AVENUE NE BELLEVUE, WA 98004	NONE EDUCATION	509(A)(1)	100,000.
PACIFIC LUTHERAN UNIVERSITY 12810 PARK AVENUE S TACOMA, WA 98447	NONE RESEARCH, HEALTH & MEDICINE	509(A)(1)	100,000.
PEDIATRIC INTERIM CARE CENTER 328 4TH AVENUE S KENT, WA 98032	NONE RESEARCH, HEALTH & MEDICINE	509(A)(1)	100,000.
PNW FRIENDS OF FSH RESEARCH 217 19TH PLACE KIRKLAND, WA 98033	NONE RESEARCH, HEALTH & MEDICINE	509(A)(1)	10,000.
RISE N SHINE 417 23RD AVENUE S SEATTLE, WA 98144	NONE SOCIAL SERVICE	509(A)(1)	10,000.

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RYTHER CHILD CENTER 2400 NE 95TH STREET SEATTLE, WA 981152426	NONE SOCIAL SERVICE	509(A)(1)	50,000.
SALK INSTITUTE 10010 NORTH TORREY PINES ROAD LA JOLLA, CA 920371099	NONE RESEARCH, HEALTH & MEDICINE	509(A)(1)	200,000.
SALVATION ARMY 422 11TH AVENUE E SEATTLE, WA 98102	NONE SOCIAL SERVICE	509(A)(1)	50,000.
SANTA ROSA MEMORIAL HOSPITAL FOUNDATION 1154 MONTGOMERY DRIVE, STE 1 SANTA ROSA, CA 95405	NONE RESEARCH, HEALTH & MEDICINE	509(A)(1)	100,000.
TUCKER MAXON ORAL SCHOOL 2860 SE HOLGATE BOULEVARD PORTLAND, OR 97202	NONE EDUCATION	509(A)(1)	15,000.
UNION GOSPEL MISSION 3800 S. OTHELLO STREET SEATTLE, WA 98118	NONE SOCIAL SERVICE	509(A)(1)	25,000.
VALLEY OF THE MOON CHILDREN'S FOUNDATION 55 PYTHIAN ROAD N SANTA ROSA, CA 95409	NONE SOCIAL SERVICE	509(A)(1)	100,000.
WHITMAN COLLEGE 345 BOYER AVENUE WALLA WALLA, WA 99362	NONE EDUCATION	509(A)(1)	200,000.
YMCA OF GREATER SEATTLE 909 FOURTH AVENUE SEATTLE, WA 98104	NONE SOCIAL SERVICE	509(A)(1)	25,000.
YWCA 1118 5TH AVENUE SEATTLE, WA 98101	NONE SOCIAL SERVICE	509(A)(1)	25,000.

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

1,760,000.

ANDERSON FOUNDATION TIN#91-6031724  
ASSET LISTING  
FORM 990 - 6/30/10

	ASSETS	QUANTITY	TAX BASIS	FMV
<b>CORPORATE BONDS</b>				
	BANCROFT FUND LTD	10,173 09	125,110	150,357
	ISHARES TRUST IBOX INV INV	4M	404,480	433,840
	PIONEER HIGH INCOME TR	58,862	843,859	883,518
	WELLS FARGO & CO NEW NT	250M	235,235	273,716
	UST INC SR NT	275M	241,203	286,731
	ARCHER DANIELS MIDLAND CO	250M	229,450	284,830
	DEERE JOHN CAP CORP	200M	175,036	223,264
	GTE CORP	250M	232,500	283,127
	BRISTOL MYERS SQUIBB CO	250M	239,098	286,808
	CONOCOPHILLIPS NT	265M	247,786	294,057
<b>TOTAL INVESTMENTS CORPORATE BONDS</b>			<b>2,973,756</b>	<b>3,400,248</b>
<b>CORPORATE STOCK US EQUITIES</b>				
	ALTRIA	8,000	158,489	160,320
	ANADARKO PETROLEUM CORP	8,000	342,362	288,720
	APACHE CORP	8,000	487,555	673,520
	AT & T CORP	10,000	272,900	241,900
	BANK OF AMERICA CORP	25,000	456,506	359,250
	BAXTER INTERNATIONAL	4,450	84,449	180,848
	BEST BUY	6,000	86,146	203,160
	BIOGEN IDEC INC	8,000	503,325	379,600
	BOEING CO	8,000	473,787	502,000
	CATERPILLAR INC	7,000	288,409	420,490
	CHEVRON CORPORATION	10,000	610,763	678,600
	CONSOL ENERGY INC	8,000	254,000	270,080
	DANAHER CORP	12,000	57,833	445,440
	DENDREON CORPORATION	3,000	164,437	96,990
	EXXON MOBIL CORP	6,000	76,841	342,420
	FORD MOTOR CO	35,000	276,605	352,800
	GENERAL DYNAMICS	4,000	132,573	234,240
	GENERAL ELECTRIC CO	25,000	442,756	360,500
	HEWLETT PACKARD CO	8,000	370,320	346,240
	INTERNATIONAL BUSINESS MACHINES	5,000	650,952	617,400
	ISHARES TR S&P SMALLCAP	4,800	151,536	273,312
	KIMBERLY CLARK CORP	4,500	166,204	272,835
	MERCK & CO	5,000	289,000	174,850
	NORFOLK SOUTHERN CORP	8,000	405,124	424,400
	OCCIDENTAL PETE CORP	8,000	137,356	617,200
	PACCAR INC	22,500	574,023	897,075
	PEPSICO INC	10,000	468,285	609,500
	PHILIP MORRIS INTL INC	8,000	364,107	366,720
	SCHLUMBERGER LTD	7,000	162,418	387,380
	SOUTHERN CO	4,000	116,976	133,120
	S & P DEPOSITORY RECEIPTS	5,000	375,199	516,100
	S & P MIDCAP 400 DEP REC	3,000	288,750	387,480
	UNITED TECHNOLOGIES	5,000	385,750	324,550
	US BANCORP DEL COM NEW	15,000	391,539	335,250
	VERIZON COMMUNICATIONS	10,000	321,300	280,200
	WELLS FARGO & CO	15,000	199,650	384,000
	WHITING PETROLEUM CORPORATION	3,000	255,386	235,260

	WHITING USA TRUST I TR UNIT	10,000	224,000	166,800
	ZIMMER HOLDINGS INC	8,000	604,755	432,400
CORPORATE STOCK - TOTAL			<b>12,072,366</b>	<b>14,372,950</b>
INTERNATIONAL EQUITIES				
	ISHARES INC MSCI PAC EX-JAPAN IN FD	10,000	216,667	357,400
	ROYAL BANK OF CANADA	30,000	1,057,293	1,433,700
	VALE S A	15,000	260,383	365,250
			<b>1,534,342</b>	<b>2,156,350</b>
PARTNERSHIPS				
	CHENIERE ENERGY PARTNERS LP	20,000	341,683	341,200
	KINDERMORGAN ENERGY PTNRS	5,000	254,250	325,300
			<b>595,933</b>	<b>666,500</b>
TOTAL INVESTMENTS CORPORATE STOCKS			<b>17,176,397</b>	<b>20,596,048</b>