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## Return of Private Foundation

## or Section 4947(a)(1) Nonexempt Charitable Trust

## Treated as a Private Foundation

2009

Department of the Treasury  
Internal Revenue Service

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 **SEP 1, 2009**, and ending **AUG 31, 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>THE HERBERT JONES FOUNDATION C/O KEYBANK NATIONAL ASSOCIATION, TTEE</b>	A Employer identification number <b>94-3124801</b>			
	Number and street (or P O box number if mail is not delivered to street address) <b>601 108TH AVE NE, SUITE 260</b>	Room/suite	B Telephone number <b>425-709-4209</b>		
	City or town, state, and ZIP code <b>BELLEVUE, WA 98004</b>	C If exemption application is pending, check here ► <input type="checkbox"/> D 1. Foreign organizations, check here ► <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ► <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	I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ► \$ <b>10,292,203.</b>	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"/>		
<b>Part I Analysis of Revenue and Expenses</b> (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			<b>N/A</b>	
	2 Check ► <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	<b>151,505.</b>	<b>151,505.</b>		<b>STATEMENT 1</b>
	4 Dividends and interest from securities	<b>99,483.</b>	<b>99,483.</b>		<b>STATEMENT 2</b>
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<b>61,756.</b>			
	b Gross sales price for all assets on line 6a	<b>2,032,946.</b>			
	7 Capital gain net income (from Part IV, line 2)	<b>61,756.</b>		<b>RECEIVED</b>	
	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					
12 Total. Add lines 1 through 11	<b>312,744.</b>	<b>312,744.</b>			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	<b>0.</b>	<b>0.</b>	<b>0.</b>	
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees	<b>STMT 3</b>	<b>1,840.</b>	<b>920.</b>	<b>920.</b>
	c Other professional fees	<b>STMT 4</b>	<b>57,997.</b>	<b>2,900.</b>	<b>55,097.</b>
	17 Interest				
	18 Taxes	<b>STMT 5</b>	<b>1,668.</b>	<b>1,668.</b>	<b>0.</b>
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses	<b>STMT 6</b>	<b>1,565.</b>	<b>459.</b>	<b>1,106.</b>
	24 Total operating and administrative expenses. Add lines 13 through 23		<b>63,070.</b>	<b>5,947.</b>	<b>57,123.</b>
25 Contributions, gifts, grants paid		<b>427,088.</b>		<b>427,088.</b>	
26 Total expenses and disbursements. Add lines 24 and 25		<b>490,158.</b>	<b>5,947.</b>	<b>484,211.</b>	
27 Subtract line 26 from line 12:		<b>-177,414.</b>			
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)		<b>306,797.</b>			
c Adjusted net income (if negative, enter -0-)			<b>N/A</b>		

## THE HERBERT JONES FOUNDATION

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Assets	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
1	Cash - non-interest-bearing				
2	Savings and temporary cash investments		648,031.	1,197,594.	1,197,594.
3	Accounts receivable ►				
	Less: allowance for doubtful accounts ►				
4	Pledges receivable ►				
	Less: allowance for doubtful accounts ►				
5	Grants receivable				
6	Receivables due from officers, directors, trustees, and other disqualified persons				
7	Other notes and loans receivable ►				
	Less: allowance for doubtful accounts ►				
8	Inventories for sale or use				
9	Prepaid expenses and deferred charges				
10a	Investments - U.S. and state government obligations	STMT 7	1,739,146.	1,489,146.	1,564,618.
b	Investments - corporate stock	STMT 8	3,470,606.	3,410,462.	4,058,250.
c	Investments - corporate bonds	STMT 9	905,879.	701,991.	758,052.
11	Investments - land, buildings, and equipment basis ►				
	Less accumulated depreciation ►				
12	Investments - mortgage loans				
13	Investments - other	STMT 10	2,742,314.	2,666,051.	2,713,689.
14	Land, buildings, and equipment basis ►				
	Less accumulated depreciation ►				
15	Other assets (describe ►)	STATEMENT 11)	136,682.	0.	0.
16	Total assets (to be completed by all filers)		9,642,658.	9,465,244.	10,292,203.
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable			
	22	Other liabilities (describe ►)			
23	Total liabilities (add lines 17 through 22)		0.	0.	
Net Assets or Fund Balances	24	Foundations that follow SFAS 117, check here ► <input type="checkbox"/>			
		and complete lines 24 through 26 and lines 30 and 31.			
	25	Unrestricted			
	26	Temporarily restricted			
	27	Permanently restricted			
	28	Foundations that do not follow SFAS 117, check here ► <input checked="" type="checkbox"/>			
		and complete lines 27 through 31.			
	29	Capital stock, trust principal, or current funds	9,642,658.	9,465,244.	
	30	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	31	Retained earnings, accumulated income, endowment, or other funds	0.	0.	
32	Total net assets or fund balances		9,642,658.	9,465,244.	
33	Total liabilities and net assets/fund balances		9,642,658.	9,465,244.	

## 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	9,642,658.
2	Enter amount from Part I, line 27a	2	-177,414.
3	Other increases not included in line 2 (itemize) ►	3	0.
4	Add lines 1, 2, and 3	4	9,465,244.
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	9,465,244.

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**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.)
<b>a SHORT-TERM CAPITAL LOSS - SEE ATTACHED DETAIL</b>			P	VARIOUS	VARIOUS
<b>b LONG-TERM CAPITAL GAIN - SEE ATTACHED DETAIL</b>			P	VARIOUS	VARIOUS
<b>c RETURN OF CAPITAL</b>			P		
<b>d</b>					
<b>e</b>					
(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 405,177.		400,518.		4,659.	
b 1,627,769.		1,568,734.		59,035.	
c		1,938.		-1,938.	
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a				4,659.	
b				59,035.	
c				-1,938.	
d					
e					
2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	61,756.	
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	{ If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 }		3	N/A	

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

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

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

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

 Yes  No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	546,058.	9,565,317.	.057087
2007	589,688.	12,192,245.	.048366
2006	612,364.	12,142,212.	.050433
2005	559,102.	11,521,419.	.048527
2004	535,155.	11,089,480.	.048258

2 Total of line 1, column (d)

2 .252671

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 .050534

4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5

4 10,506,499.

5 Multiply line 4 by line 3

5 530,935.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6 3,068.

7 Add lines 5 and 6

7 534,003.

8 Enter qualifying distributions from Part XII, line 4

8 484,211.

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.

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**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 ►  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 ►  and enter 1% of Part I, line 27b

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-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

6 Credits/Payments:

a 2009 estimated tax payments and 2008 overpayment credited to 2009

6a 6,376.

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 6,376.

8 Enter any **penalty** for underpayment of estimated tax. Check here  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

10 240.

11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ►

11 Refunded

240.

11 0.

**Part VII-A Statements Regarding Activities**

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?

Yes

No

1a X

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?

1b X

*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.*

1c X

c Did the foundation file Form 1120-POL for this year?

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:

2 X

(1) On the foundation. ► \$ 0. (2) On foundation managers. ► \$ 0.

e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 0.

3 X

2 Has the foundation engaged in any activities that have not previously been reported to the IRS?

4a X

*If "Yes," attach a detailed description of the activities.*

4b 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*

5 X

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

6 X

b If "Yes," has it filed a tax return on Form 990-T for this year?

7 X

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

N/A

*If "Yes," attach the statement required by General Instruction T.*

6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:

8b X

• By language in the governing instrument, or

9 X

• 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?

10 X

7 Did the foundation have at least \$5,000 in assets at any time during the year?

WA

*If "Yes," complete Part II, col. (c), and Part XV.*

8a Enter the states to which the foundation reports or with which it is registered (see instructions) ►

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)

8b X

of each state as required by General Instruction G? *If "No," attach explanation*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*10 Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*

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**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 ► **HTTP : //WWW.HBJFOUNDATION.COM** 13  X

14 The books are in care of ► **KEYBANK NATIONAL ASSOCIATION** Telephone no. ► **425-709-4209**  
Located at ► **601 - 108TH AVE NE, SUITE 260, BELLEVUE, WA** 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.

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?  Yes  X  No

(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  Yes  X  No

(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  Yes  X  No

(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  Yes  X  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)?  Yes  X  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.)  Yes  X  No

**Yes** **No**

Yes  X  No

**N/A**

**1b**

Yes  X  No

**N/A**

**1c**

Yes  X  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**

**2b**

Yes  X  No

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?

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)):  Yes  X  No

**N/A**

Yes  X  No

**2b**

Yes  X  No

**N/A**

Yes  X  No

**3b**

Yes  X  No

**4a**

Yes  X  No

**4b**

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?  Yes  X  No

If "Yes," list the years ► \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

Yes  X  No

**N/A**

Yes  X  No

**2b**

Yes  X  No

**N/A**

Yes  X  No

**3b**

Yes  X  No

**4a**

Yes  X  No

**4b**

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.)  Yes  X  No

Yes  X  No

**N/A**

Yes  X  No

**2b**

Yes  X  No

**N/A**

Yes  X  No

**3b**

Yes  X  No

**4a**

Yes  X  No

**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))?
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?
- (3) Provide a grant to an individual for travel, study, or other similar purposes?
- (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)?
- (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  
 Yes  No  
 Yes  No  
 Yes  No  
 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
SEE STATEMENT 12		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

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

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

**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

<b>1</b>	<b>N/A</b>	
<b>2</b>		
<b>3</b>		
<b>4</b>		

**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

<b>1</b>	<b>N/A</b>	
<b>2</b>		
<b>3</b>		
<b>Total.</b> Add lines 1 through 3		<b>0.</b>

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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

b Average of monthly cash balances

c Fair market value of all other assets

d **Total** (add lines 1a, b, and c)

e Reduction claimed for blockage or other factors reported on lines 1a and

1c (attach detailed explanation)

1e

0.

1a	9,796,729.
1b	869,767.
1c	0.
1d	10,666,496.
2	0.
3	10,666,496.
4	159,997.
5	10,506,499.
6	525,325.

2 Acquisition indebtedness applicable to line 1 assets

3 Subtract line 2 from line 1d

4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)

5 **Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 46 **Minimum investment return.** Enter 5% of line 5**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	525,325.
2a	6,136.
2b	
2c	6,136.
3	519,189.
4	0.
5	519,189.
6	0.
7	519,189.

2a Tax on investment income for 2009 from Part VI, line 5

b Income tax for 2009. (This does not include the tax from Part VI.)

c Add lines 2a and 2b

3 Distributable amount before adjustments. Subtract line 2c from line 1

4 Recoveries of amounts treated as qualifying distributions

5 Add lines 3 and 4

6 Deduction from distributable amount (see instructions)

7 **Distributable amount as adjusted.** Subtract line 6 from line 5. Enter here and on Part XIII, line 1**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

b Program-related investments - total from Part IX-B

2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes

3 Amounts set aside for specific charitable projects that satisfy the:

a Suitability test (prior IRS approval required)

b Cash distribution test (attach the required schedule)

4 **Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4

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

6 **Adjusted qualifying distributions.** Subtract line 5 from line 4

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.

1a	484,211.
1b	0.
2	
3a	
3b	
4	484,211.
5	0.
6	484,211.

Form 990-PF (2009)

## THE HERBERT JONES FOUNDATION

Form 990-PF (2009)

C/O KEYBANK NATIONAL ASSOCIATION, TTEE

94-3124801

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**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				519,189.
2 Undistributed income, if any, as of the end of 2009			172,305.	
a Enter amount for 2008 only				
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 484,211.			172,305.	
a Applied to 2008, but not more than line 2a				
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	0.			311,906.
e Remaining amount distributed out of corpus				
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	0.			
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				207,283.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				



## Part XV | Supplementary Information (continued)

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)				
<i>a Paid during the year</i>				
<b>SEE STATEMENT 14</b>				
<b>Total</b>			► 3a	<b>427,088.</b>
<i>b Approved for future payment</i>				
<b>NONE</b>				
<b>Total</b>			► 3b	<b>0.</b>

THE HERBERT JONES FOUNDATION

**Form 990-PF (2009)**

C/O KEYBANK NATIONAL ASSOCIATION, TTEE

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

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		
1 Program service revenue:				
a				
b				
c				
d				
e				
f				
g Fees and contracts from government agencies				
2 Membership dues and assessments				
3 Interest on savings and temporary cash investments			14	151,505.
4 Dividends and interest from securities			14	99,483.
5 Net rental income or (loss) from real estate:				
a Debt-financed property				
b Not debt-financed property				
6 Net rental income or (loss) from personal property				
7 Other investment income				
8 Gain or (loss) from sales of assets other than inventory			18	61,756.
9 Net income or (loss) from special events				
10 Gross profit or (loss) from sales of inventory				
11 Other revenue:				
a				
b				
c				
d				
e				
12 Subtotal. Add columns (b), (d), and (e)		0.	312,744.	0.
13 Total. Add line 12, columns (b), (d), and (e)			13	312,744.
(See worksheet in line 13 instructions to verify calculations.)				

## **Relationship of Activities to the Accomplishment of Exempt Purposes**



EIN 94-3124801  
 2009 FORM 990-PF  
 HERBERT B JONES FOUNDATION M/AG 40 SCHEDULE D ATTACHMENT  
 Schedule D Detail of Short-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Short-term Gain/Loss
1300. ABBOTT LABS COM	01/08/2009	10/13/2009	64,446.36	66,917.76	-2,471.40
2000. DEUTSCHE TELEKOM AG SPONS	10/31/2008	10/13/2009	27,527.29	29,765.00	-2,237.71
2000. BANK OF NEW YORK MELLON CORP COM	04/30/2009	02/05/2010	52,799.32	53,140.00	-340.68
1000. BHP BILLITON LTD SPONS ADR	05/13/2009	02/05/2010	67,009.14	49,837.50	17,171.64
500. BURLINGTON NORTHERN SANTA FE COM	05/26/2009	02/16/2010	50,000.00	35,016.00	14,984.00
800. BAXTER INTERNATIONAL INC	02/05/2010	04/12/2010	46,482.17	45,039.92	1,442.25
500. TELEFONICA S A SPONS ADR	10/13/2009	06/24/2010	29,619.49	41,855.00	-12,235.51
1320. ADOBE SYS INC COM	08/10/2009	07/16/2010	36,393.50	43,230.00	-6,836.50
1000. NOBLE CORP FGN COM	08/28/2009	08/24/2010	30,899.47	35,717.00	-4,817.53
<b>Totals</b>			<b>405,177.00</b>	<b>400,518.00</b>	<b>4,659.00</b>

HERBERT B JONES FOUNDATION M/AG 40 SCHEDULE D ATTACHMENT  
Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
<b>15% RATE CAPITAL GAINS (LOSSES)</b>					
<b>100000. INTERNATIONAL BUSINESS</b>					
MACHS NOTE	10/02/2003	09/15/2009	100,000.00	103,636.00	-3,636.00
875. COLGATE PALMOLIVE CO COM	05/02/2008	10/13/2009	68,774.02	64,509.90	4,264.12
1650. FPL GROUP INC COM	04/09/2008	10/13/2009	87,442.31	109,675.50	-22,233.19
800. ITT INDS INC IND COM	01/12/2007	10/13/2009	42,351.31	47,832.00	-5,480.69
1100. ITT INDS INC IND COM	08/31/2006	10/13/2009	58,233.05	54,043.00	4,190.05
100. MICROSOFT CORP COM	07/20/2004	10/13/2009	2,578.43	2,820.00	-241.57
900. MICROSOFT CORP COM	07/31/2006	10/13/2009	23,205.90	21,852.00	1,353.90
250000. FEDERAL FARM CR BANKS DEB	10/17/2008	10/28/2009	250,000.00	250,000.00	
1250. GENZYME CORP GENL DIVISION COM	12/18/2008	12/30/2009	62,077.40	85,634.50	-23,557.10
600. APPLE INC COM	03/09/2007	02/05/2010	115,133.55	52,773.42	62,360.13
1000. ECOLAB INC COM	12/24/2003	02/05/2010	42,159.56	26,989.60	15,169.96
100000. SLM CORP MED TERM NT	09/10/2004	04/19/2010	81,900.00	100,000.00	-18,100.00
100000. SLM CORP MED TERM NT	01/18/2005	04/19/2010	81,900.00	99,450.00	-17,550.00
1200. QUALCOMM INC COM	03/09/2007	06/16/2010	42,077.29	48,660.00	-6,582.71
1488. QUALCOMM INC COM	11/13/2006	06/16/2010	52,175.84	53,612.64	-1,436.80
12. QUALCOMM INC COM	11/13/2006	06/16/2010	420.83	432.36	-11.53
250. ECOLAB INC COM	12/24/2003	06/24/2010	11,587.30	6,747.40	4,839.90
75. GOOGLE INC COM CL A	05/25/2007	06/24/2010	35,888.39	36,129.46	-241.07
5. GOOGLE INC COM CL A	11/03/2005	06/24/2010	2,392.56	1,917.11	475.45
250. STERICYCLE INC COM	12/24/2003	06/24/2010	16,117.22	5,932.59	10,184.63
.681 EXXON MOBIL CORP COM	01/30/2006	07/12/2010	38.84	37.68	1.16
500. ECOLAB INC COM	12/24/2003	07/16/2010	23,869.84	13,494.80	10,375.04
100000. GOLDMAN SACHS GROUP INC	03/25/2008	07/16/2010	108,017.00	100,252.00	7,765.00
100. GOOGLE INC COM CL A	11/03/2005	07/16/2010	46,826.85	38,342.20	8,484.65
300. ISHARES S&P MIDCAP 400 INDEX FD CLOSED-END FUND	08/31/2006	07/16/2010	21,935.68	22,502.26	-566.58
425. PRAXAIR INC COM	07/07/2006	07/16/2010	34,441.50	22,976.65	11,464.85
295. PRAXAIR INC COM	01/11/2006	07/16/2010	23,906.45	15,340.00	8,566.45
3000. SCHWAB CHARLES CORP NEW	04/30/2009	07/16/2010	46,742.20	55,571.10	-8,828.90
500. STERICYCLE INC COM	12/24/2003	07/16/2010	32,264.55	11,865.17	20,399.38
<b>Totals</b>					

2009 FORM 990-PP

**HERBERT B JONES FOUNDATION M/AG 40 SCHEDULE D ATTACHMENT**  
**Schedule D Detail of Long-term Capital Gains and Losses**

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

SOURCE	AMOUNT
KEY BANK - ACCRUED INTEREST	-4,458.
KEY BANK - CORPORATE INTEREST	87,834.
KEY BANK - FOREIGN INTEREST	10,125.
KEY BANK - US GOVT INTEREST	58,004.
<b>TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A</b>	<b>151,505.</b>

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
KEY BANK - FOREIGN DIVIDENDS	18,069.	0.	18,069.
KEY BANK - OTHER DIVIDENDS	74,667.	0.	74,667.
KEY BANK - USGI DIVIDENDS	6,747.	0.	6,747.
<b>TOTAL TO FM 990-PF, PART I, LN 4</b>	<b>99,483.</b>	<b>0.</b>	<b>99,483.</b>

## FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION FEE	1,840.	920.		920.
TO FORM 990-PF, PG 1, LN 16B	1,840.	920.		920.

## FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EVERTRUST FEES & COMMISSIONS	57,997.	2,900.		55,097.
TO FORM 990-PF, PG 1, LN 16C	57,997.	2,900.		55,097.

FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES PAID	1,668.	1,668.		0.
TO FORM 990-PF, PG 1, LN 18	1,668.	1,668.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MEMBERSHIP - ASSOCIATION OF SMALL FOUNDATIONS	495.	0.		495.
WEBSITE MAINTENANCE	150.	0.		150.
WASHINGTON STATE FILING FEES	25.	12.		13.
MISCELLANEOUS EXPENSES	895.	447.		448.
TO FORM 990-PF, PG 1, LN 23	1,565.	459.		1,106.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	7
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
U.S. AGENCY BOND	X		706,730.	757,938.
US TREASURY BONDS/NOTES	X		782,416.	806,680.
TOTAL U.S. GOVERNMENT OBLIGATIONS			1,489,146.	1,564,618.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			1,489,146.	1,564,618.

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
COMMON STOCK	3,410,462.	4,058,250.
TOTAL TO FORM 990-PF, PART II, LINE 10B	3,410,462.	4,058,250.

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	701,991.	758,052.
TOTAL TO FORM 990-PF, PART II, LINE 10C	701,991.	758,052.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	10
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
FIXED INCOME INVESTMENTS	COST	787,077.	844,272.
EQUITY INVESTMENTS	COST	1,328,526.	1,461,816.
LONG TERM FLOATING BONDS	COST	200,000.	39,250.
FOREIGN BONDS	COST	350,448.	368,351.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,666,051.	2,713,689.

FORM 990-PF	OTHER ASSETS	STATEMENT	11
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
SECURITY SALES PROCEEDS RECEIVABLE	136,682.	0.	0.
TO FORM 990-PF, PART II, LINE 15	136,682.	0.	0.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS  
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 12

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
MICHAEL BAUER C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.
JANET WOODS C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.
BILL ERWERT C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.
GARY KUHAR C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.
TERRY SMITH C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.
NANCY LEMKE C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.
TOM CRHA C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.
JUDY KLINKHAM C/O KEYBANK NATIONAL ASSOCIATION, 601 - 108TH AVE NE, SUITE 260 BELLEVUE, WA 98004	TRUSTEE 0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF

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

STATEMENT 13

## NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

HERBERT B. JONES FOUNDATION C/O KEYBANK NATIONAL ASSOCIATION,  
601 - 108TH AVENUE NE SUITE 260  
BELLEVUE, WA 98004

## TELEPHONE NUMBER

## FORM AND CONTENT OF APPLICATIONS

SEE GRANT APPLICATION FORM ATTACHED.

## ANY SUBMISSION DEADLINES

APRIL 1

## RESTRICTIONS AND LIMITATIONS ON AWARDS

THE FOUNDATION PROMOTES ENTREPRENEURISM AND SMALL BUSINESS THROUGH THE INITIAL AND TEMPORARY SUPPORT OF NEW BUSINESS PROGRAMS MANAGED BY POST-SECONDARY EDUCATIONAL ENTITIES IN THE STATE OF WASHINGTON. SEE MISSION STATEMENT ON GRANT APPLICATION.

FORM 990-PF

GRANTS AND CONTRIBUTIONS  
PAID DURING THE YEAR

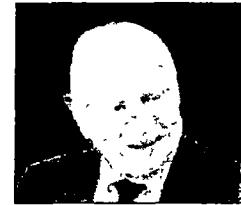
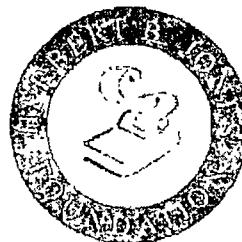
STATEMENT 14

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
ENTERPRISE FOR EQUITY	NONE SMALL BUSINESS TRAINING	EDUCATION	35,000.
EVERETT COMMUNITY COLLEGE	NONE ENTREPRENEUR DEGREE	EDUCATION	25,000.
GONZAGA UNIVERSITY	NONE BUSINESS PLAN COMPETITION	EDUCATION	15,000.
GONZAGA UNIVERSITY	NONE COLLABORATION WITH SPOKANE CC	EDUCATION	16,000.
N W SCHOOL FOR HEARING-IMPAIRED CHILDREN	NONE GENERAL FUND	EDUCATION	30,746.
PACIFIC LUTHERAN UNIVERSITY	NONE IMPACT CASE COMPETITION	EDUCATION	20,000.
SEATTLE PACIFIC UNIVERSITY	NONE SOCIAL VENTURE COMPETITION	EDUCATION	20,000.
SEATTLE UNIVERSITY	NONE STUDENTS IN FREE ENTERPRISE	EDUCATION	32,000.

## THE HERBERT JONES FOUNDATION C/O KEYBANK

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SHORELINE COMMUNITY COLLEGE	NONE SMALL BUSINESS ACCELERATOR	EDUCATION	14,000.
SPOKANE COMMUNITY COLLEGE	NONE ENTREPRENEUR COLLABORATION	EDUCATION	18,000.
UNIVERSITY OF WASHINGTON	NONE BUSINESS PLAN COMPETITION	EDUCATION	26,000.
UNIVERSITY OF WASHINGTON BOTHELL	NONE BUSINESS DEVELOPMENT CENTER	EDUCATION	15,000.
WASHINGTON CASH	NONE MICRO ENTERPRISE DEVELOPMENT	EDUCATION	25,000.
WASHINGTON STATE UNIVERSITY	NONE CAMPUS ENTREPRENEUR	EDUCATION	27,000.
WENATCHEE VALLEY COLLEGE	NONE CENTER FOR ENTREPRENEURSHIP	EDUCATION	35,000.
EASTERN WASHINGTON UNIVERSITY	NONE GREEN BUSINESS PRACTICES	EDUCATION	35,000.
WHITWORTH COLLEGE	NONE INLAND BUSINESS PLAN COMPETITION	EDUCATION	18,342.
NW ENTREPRENEUR NETWORK	NONE ENTREPRENEUR UNIVERSITY	EDUCATION	20,000.
TOTAL TO FORM 990-PF, PART XV, LINE 3A			427,088.



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## HERBERT JONES FOUNDATION GRANT APPLICATION

### MISSION STATEMENT

The Herbert B. Jones Foundation believes that entrepreneurship and small business are the backbone for the strength of our economic system

We promote this belief through the initial and temporary support of new business programs managed by post-secondary educational entities in the state of Washington. We desire the business community to be a vibrant and productive environment and the recipients of the Foundation's support to positively impact our greater business community

### GUIDELINES

- Grant requests will be for fiscal years, starting September 1
- Grant requests are due by the first Monday in April
- Maximum 2 requests for consideration a. A request can contain two or more inter-related, dependent segments, b. Each segment must show its need for other segments' accomplishment
- The minimum font size 11
- Grants funds will not be provided for equipment,

capital projects, gifts, endowments, or food costs

- Applicants must adhere strictly to format
- Please provide (6) stapled copies to Herbert B. Jones Foundation c/o Key Private Bank, 601 108th Ave NE Suite 260, Bellevue, WA, 98004
- The Foundation may make inquiries before, and will formally respond within 8 weeks

**APPLICATION FORMAT  
( Maximum 2 pages)**

Name of Organization/Amount  
Requested/Time Period Requested  
Description/summary of program

- Goals/objectives of program; i.e. how do these relate to HBJ mission statement?
- Results expected, i.e. how do the results satisfy HBJ goals?
- Target population, i.e. who benefits?
- Key staff and number of students to be involved
- Plan for measuring program results; i.e. how do you know you have succeeded?

**PROGRAM BUDGET  
( MAXIMUM 1 PAGE)**

- Detailed itemization of costs for each program and HBJ's funding portion
- Other funding resources; participant payments, grants, gifts, other
- Timetable of anticipated organizational expenditures

**APPENDIX ( NOT REQUIRED)**

**IF PREVIOUSLY PROVIDED)**

- Resume summary page (no more than ½ a page for each)
- History and mission of the organization
- Board and affiliations
- Overall Structure, description of sub-unit utilizing grant
- Evidence that your organization is a qualified tax-exempt organization capable of receiving grants from a private foundation

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