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

2009

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

For calendar year 2009, or tax year beginning OCTOBER 01, 2009, and ending SEPTEMBER 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<br>label.<br>Otherwise,<br>print<br>or type.<br>See Specific<br>Instructions. | Name of foundation<br><b>STOCKTON RUSH BARTOL FOUNDATION</b>  | A Employer Identification number<br><b>23-2318470</b>  |
|   | Number and street (or P O box number if mail is not delivered to street address)<br><b>230 SOUTH BROAD STREET</b>   | Room/suite<br><b>1003</b>  |
|   | City or town, state, and ZIP code<br><b>PHILADELPHIA PA 19102</b>   | C If exempt application is pending, check here ►   |
| H Check type of organization:   | <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation<br><input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation | D 1. Foreign organizations, check here ►<br>2. Foreign organizations meeting the 85% test, check here and attach computation ► |
| I Fair market value of all assets at end of year (from Part II, col (c), line 16)         | J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual<br><input type="checkbox"/> Other (specify) _____  | E If private foundation status was terminated under section 507(b)(1)(A), check here . . . ►                                   |
| ► \$ <b>5,245,940</b>   | (Part I, column (d) must be on cash basis)  | F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here . . . ►                                |

| <b>Part I Analysis of Revenue and Expenses</b><br>(The total of amounts in columns (b), (c), & (d) may not necessarily equal the amounts in column (a) (see instructions))  |   | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|---|---|------------------------------------|---------------------------|-------------------------|---|
| <b>R<br/>E<br/>V<br/>E<br/>N<br/>U<br/>E</b>  | 1 Contributions, gifts, grants, etc., received (attach schedule)        | <b>32,984</b>                      |                           |                         |   |
|   | 2 Check ► if the foundation is not required to attach Sch B             |                                    |                           |                         |   |
|   | 3 Interest on savings and temp cash investments                         |                                    |                           |                         |   |
|   | 4 Dividends and interest from securities                                | <b>166,243</b>                     | <b>166,243</b>            |                         |   |
|   | 5 a Gross rents . . . . .   |                                    |                           |                         |   |
|   | b Net rental income or (loss) _____                                     |                                    |                           |                         |   |
|   | 6 a Net gain/(loss) from sale of assets not on line 10                  | <b>192,314</b>                     |                           |                         |   |
|   | b Gross sales price for all assets on line 6a <b>1,544,710</b>          |                                    |                           |                         |   |
|   | 7 Capital gain net income (from Part IV, line 2) . . .                  | <b>192,314</b>                     |                           |                         |   |
|   | 8 Net short-term capital gain . . . . .                                 |                                    |                           | <b>0</b>                |   |
|   | 9 Income modifications . . . . .  |                                    |                           | <b>0</b>                |   |
|   | 10 a Gross sales less rnts & allowances <b>0</b>                        |                                    |                           |                         |   |
| b Less Cost of goods sold . . . . .   |   |                                    |                           |                         |   |
| c Gross profit or (loss) (attach schedule)  |   |                                    |                           |                         |   |
| 11 Other income (attach schedule) <b>#1</b>   | <b>16,573</b>   | <b>7,573</b>                       |                           |                         |   |
| 12 Total. Add lines 1 through 11 . . . . .  | <b>408,114</b>  | <b>366,130</b>                     | <b>0</b>                  |                         |   |
| <b>O<br/>P<br/>E<br/>R<br/>A<br/>T<br/>I<br/>N<br/>G<br/>&amp;<br/>A<br/>D<br/>M<br/>I<br/>N<br/>I<br/>S<br/>T<br/>R<br/>U<br/>C<br/>T<br/>U<br/>R<br/>E<br/>S<br/>C<br/>A<br/>N<br/>N<br/>E<br/>D<br/>F<br/>E<br/>R<br/>C<br/>X<br/>P<br/>E<br/>N<br/>S<br/>E<br/>S<br/>I<br/>S</b><br><b>2011</b> | 13 Compensation of officers, directors, trustees, etc . . . . .         | <b>72,100</b>                      |                           |                         | <b>72,100</b>   |
|   | 14 Other employee salaries and wages . . . . .                          | <b>25,496</b>                      |                           |                         | <b>25,496</b>   |
|   | 15 Pension plans, employee benefits . . . . .                           | <b>6,804</b>                       |                           |                         | <b>6,804</b>  |
|   | 16 a Legal fees (attach schedule) . . . . .                             |                                    |                           |                         |   |
|   | b Accounting fees (attach schedule) <b>#2</b>                           | <b>7,781</b>                       |                           |                         | <b>7,781</b>  |
|   | c Other professional fees (attach schedule) <b>#3</b>                   | <b>35,898</b>                      | <b>35,898</b>             |                         |   |
|   | 17 Interest . . . . .   |                                    |                           |                         |   |
|   | 18 Taxes (attach schedule) (see instruction <b>#4</b> )                 | <b>13,128</b>                      | <b>2,020</b>              |                         | <b>13,128</b>   |
|   | 19 Depreciation (attach sch ) and depletion                             | <b>938</b>                         |                           |                         | <b>938</b>  |
|   | 20 Occupancy . . . . .  | <b>19,346</b>                      |                           |                         | <b>19,346</b>   |
|   | 21 Travel, conferences, and meetings . . . . .                          | <b>1,839</b>                       |                           |                         | <b>1,839</b>  |
|   | 22 Printing and publications . . . . .                                  | <b>976</b>                         |                           |                         | <b>976</b>  |
|   | 23 Other expenses (attach schedule) <b>#5</b>                           | <b>13,219</b>                      |                           |                         | <b>13,221</b>   |
|   | 24 Total operating and administrative expenses. Add lines 13 through 23 | <b>197,525</b>                     | <b>37,920</b>             | <b>0</b>                | <b>155,387</b>  |
| 25 Contributions, gifts, grants paid . . . . .  | <b>135,000</b>  |                                    |                           | <b>135,000</b>          |   |
| 26 Total exp. & disbursements. Add lines 24 and 25  | <b>332,525</b>  | <b>37,920</b>                      | <b>0</b>                  | <b>290,387</b>          |   |
| 27 Subtract line 26 from line 12:<br>a Excess of revenue over expenses and disbursements . . . . .  | <b>75,589</b>   |                                    |                           |                         |   |
| b Net investment income (if neg., enter -0-) . . . . .  |   | <b>328,210</b>                     |                           |                         |   |
| c Adjusted net income (if neg., enter -0-) . . . . .  |   |                                    | <b>0</b>                  |                         |   |

For Privacy Act and Paperwork Reduction Act Notice, see the Instructions.

| <b>Part II</b> <b>Balance Sheets</b>   |  | Attached schedules and amounts in the description column should be for end-of-year amounts only (See inst.) |                       |           |
|--|--|---|-----------------------|-----------|
|  |  | Beginning of year   | End of year           |           |
|  | (a) Book Value   | (b) Book Value  | (c) Fair Market Value |           |
| <b>A</b><br><b>S</b><br><b>S</b><br><b>E</b><br><b>T</b><br><b>S</b>   | 1 Cash -- non-interest-bearing .....   | 30,090  | 19,433                | 19,433    |
|  | 2 Savings and temporary cash investments .....   | 283,663   | 102,610               | 102,610   |
|  | 3 Accounts receivable ► 3,000  |   | 3,000                 | 3,000     |
|  | Less allowance for doubtful accts ►  |   |                       |           |
|  | 4 Pledges receivable ►   |   |                       |           |
|  | Less allowance for doubtful accts. ►   |   |                       |           |
|  | 5 Grants receivable .....  |   |                       |           |
|  | 6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)            |   |                       |           |
|  | 7 Other notes and loans receivable (attach schedule) ►   |   |                       |           |
|  | Less allowance for doubtful accounts ►   |   |                       |           |
|  | 8 Inventories for sale or use .....  |   |                       |           |
|  | 9 Prepaid expenses and deferred charges .....  | 9,959   | 6,144                 | 6,144     |
| <b>L</b><br><b>I</b><br><b>A</b><br><b>B</b>   | 10a Investments -- U S and state govt obligations (attach sch)   |   |                       |           |
|  | b Investments -- corporate stock (attach schedule) #6  | 2,377,109   | 2,419,463             | 2,419,463 |
|  | c Investments -- corporate bonds (attach schedule) #7  | 140,640   | 321,627               | 321,627   |
| <b>I</b><br><b>L</b><br><b>I</b><br><b>B</b>   | 11 Investments -- land, buildings, and equipment basis .....   |   |                       |           |
|  | Less accumulated depreciation (attach schedule) ►  |   |                       |           |
|  | 12 Investments -- mortgage loans .....   |   |                       |           |
|  | 13 Investments -- other (attach schedule) #8   | 2,069,912   | 2,359,514             | 2,359,514 |
| <b>N</b><br><b>F</b><br><b>E</b><br><b>T</b><br><b>D</b><br><b>A</b><br><b>S</b><br><b>S</b><br><b>E</b><br><b>T</b><br><b>S</b><br><b>N</b><br><b>C</b><br><b>O</b><br><b>R</b><br><b>S</b> | 14 Land, buildings, and equipment basis ► 28,884   | 1,106   | 4,689                 | 4,689     |
|  | Less accumulated depreciation (attach schedule) ► 24,195   | 9,100   | 9,460                 | 9,460     |
|  | 15 Other assets (describe ► SEE ATTACHMENT #10)  |   |                       |           |
|  | 16 Total assets (to be completed by all filers -- see the instructions Also, see page 1, item I) .....                                   | 4,921,579   | 5,245,940             | 5,245,940 |
| <b>L</b><br><b>I</b><br><b>A</b><br><b>B</b>   | 17 Accounts payable and accrued expenses .....   | 13,626  | 10,899                |           |
|  | 18 Grants payable .....  |   |                       |           |
|  | 19 Deferred revenue .....  |   |                       |           |
|  | 20 Loans from officers, directors, trustees, and other disqualified persons .....  |   |                       |           |
|  | 21 Mortgages and other notes payable (attach schedule)   |   |                       |           |
|  | 22 Other liabilities (describe ► )   |   |                       |           |
|  | 23 Total liabilities (add lines 17 through 22) .....   | 13,626  | 10,899                |           |
|  | Foundations that follow SFAS 117, check here ► <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31. |   |                       |           |
|  | 24 Unrestricted .....  | 4,899,882   | 5,235,041             |           |
|  | 25 Temporarily restricted .....  | 8,071   |                       |           |
|  | 26 Permanently restricted .....  |   |                       |           |
|  | Foundations that do not follow SFAS 117, ck. here ► <input type="checkbox"/> and complete lines 27 through 31.                           |   |                       |           |
|  | 27 Capital stock, trust principal, or current funds .....  |   |                       |           |
|  | 28 Paid-in or capital surplus, or land, bldg , and equipment fund .....  |   |                       |           |
|  | 29 Retained earnings, accumulated income, endowment, or other funds .....  |   |                       |           |
|  | 30 Total net assets or fund balances (see the instructions) .....  | 4,907,953   | 5,235,041             |           |
|  | 31 Total liabilities and net assets/fund balances (see the inst.)  | 4,921,579   | 5,245,940             |           |

**Part III** **Analysis of Changes in Net Assets or Fund Balances**

|   |   |           |
|---|---|-----------|
| 1 Total net assets or fund balances at beginning of year -- Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) ..... | 1 | 4,907,953 |
| 2 Enter amount from Part I, line 27a .....  | 2 | 75,589    |
| 3 Other increases not included in line 2 (itemize) ► SEE ATTACHMENT #11   | 3 | 251,499   |
| 4 Add lines 1, 2, and 3 .....   | 4 | 5,235,041 |
| 5 Decreases not included in line 2 (itemize) ►  | 5 |           |
| 6 Total net assets or fund balances at end of year (line 4 minus line 5) -- Part II, column (b), line 30 .....  | 6 | 5,235,041 |

**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<br>P -- Purchase<br>D -- Donation | (c) Date acquired<br>(mo., day, yr.)  | (d) Date sold<br>(mo., day, yr.) |
|---|---|--|---|----------------------------------|
| <b>1a SEE ATTACHMENT #12</b>  |   |  |   |                                  |
| b   |   |  |   |                                  |
| c   |   |  |   |                                  |
| d   |   |  |   |                                  |
| e   |   |  |   |                                  |
| (e) Gross sales price   | (f) Depreciation allowed<br>(or allowable)                                      | (g) Cost or other basis<br>plus expense of sale    | (h) Gain or (loss)<br>(e) plus (f) minus (g)  |                                  |
| a   |   |  |   |                                  |
| b   |   |  |   |                                  |
| c   |   |  |   |                                  |
| d   |   |  |   |                                  |
| e   |   |  |   |                                  |
| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69   |   |  |   |                                  |
| (I) F M V as of 12/31/69  | (J) Adjusted basis<br>as of 12/31/69  | (K) Excess of col. (I)<br>over col. (J), if any    | (L) Gains (Col. (h) gain minus<br>col. (K), but not less than -0-) or<br>Losses (from col. (h)) |                                  |
| a   |   |  |   |                                  |
| b   |   |  |   |                                  |
| c   |   |  |   |                                  |
| d   |   |  |   |                                  |
| e   |   |  |   |                                  |
| 2 Capital gain net income or (net capital loss) . . . . .   | If gain, also enter in Part I, line 7<br>If (loss), enter -0- in Part I, line 7 |  | 2   | 192,314                          |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)<br>If gain, also enter in Part I, line 8, column (c) (see the instructions). . . . .<br>If (loss), enter -0- in Part I, line 8 . . . . . |   |  | 3   | 0                                |

**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 the instructions before making any entries

| (a)<br>Base period years<br>Calendar year (or tax year beg. in) | (b)<br>Adjusted qualifying distributions | (c)<br>Net value of<br>noncharitable-use assets | (d)<br>Distribution ratio<br>(col. (b) divided by col. (c)) |
|---|--|---|---|
| 2008  | 286,612                                  | 4,402,983                                       | 0.065095  |
| 2007  | 320,048                                  | 5,967,936                                       | 0.053628  |
| 2006  | 339,081                                  | 6,347,490                                       | 0.053420  |
| 2005  | 326,594                                  | 6,061,601                                       | 0.053879  |
| 2004  | 323,713                                  | 5,770,886                                       | 0.056094  |

|  |   |           |
|--|---|-----------|
| 2 Total of line 1, column (d) . . . . .  | 2 | 0.282116  |
| 3 Average distribution ratio for the 5-year base period -- divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years. . . . . | 3 | 0.056423  |
| 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5. . . . .  | 4 | 4,767,308 |
| 5 Multiply line 4 by line 3 . . . . .  | 5 | 268,986   |
| 6 Enter 1% of net investment income (1% of Part I, line 27b) . . . . .   | 6 | 3,282     |
| 7 Add lines 5 and 6 . . . . .  | 7 | 272,268   |
| 8 Enter qualifying distributions from Part XII, line 4. . . . .  | 8 | 290,387   |

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.

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 -- see the 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 ruling 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  | 3282     |
| 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  | 3,282    |
| 4  | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) .   | 4  | 0        |
| 5  | <b>Tax based on Investment Income.</b> Subtract line 4 from line 3. If zero or less, enter -0-.....  | 5  | 3,282    |
| 6  | <b>Credits/Payments</b>  |    |          |
| a  | 2009 estimated tax payments and 2008 overpayment credited to 2009 .....  | 6a | 4,553    |
| 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  | 4,553    |
| 8  | Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached .....                                     | 8  |          |
| 9  | <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> .....  | 9  |          |
| 10 | <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> .....  | 10 | 1,271    |
| 11 | Enter amount of line 10 to be <b>Credited to 2010 estimated tax</b> ►  | 11 | Refunded |

**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                                   |
| 1b  | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? .....  | 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  | Did the foundation file <b>Form 1120-POL</b> 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 ► \$ <u>0</u>   | (2) | On foundation managers ► \$ <u>0</u> |
| e   | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers .....  |     |                                      |
| 2   | Has the foundation engaged in any activities that have not previously been reported to the IRS? .....   | X   |                                      |
|     | If "Yes," attach a detailed description of the activities.  |     |                                      |
| 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 <b>Form 990-T</b> for this year? .....   |     |                                      |
| 5   | Was there a liquidation, termination, dissolution, or substantial contraction during the year? .....  | X   |                                      |
|     | 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:   |     |                                      |
| ●   | 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? .....  |     |                                      |
| 7   | Did the foundation have at least \$5,000 in assets at any time during the yr? If "Yes," complete Part II, col. (c), & Part XV.  |     |                                      |
| 8a  | Enter the states to which the foundation reports or with which it is registered (see the instructions)  |     |                                      |
| ►PA |   |     |                                      |
| 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. |     |                                      |
| 10  | Did any persons become substantial contributors during tax year? If "Yes," attach a schedule listing their names and addresses .....  | X   |                                      |

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

|   |   |   |
|---|---|---|
| 11  |   | X |
| 12  |   | X |
| 13  | X |   |
| <b>14</b> The books are in care of ► <b>SEE ATTACHMENT #13</b> Telephone no. ►  |   |   |
| Located at ► ZIP+4 ►  |   |   |
| <b>15</b> 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 ► |   |   |

**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                                     |
|---|--------------------------|-----|--|
| <b>1a</b> 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>b</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 the instructions)? . . . . .   |                          | 1b  | X                                      |
| Organizations relying on a current notice regarding disaster assistance check here . . . . . ► <input type="checkbox"/>   |                          |     |  |
| <b>c</b> 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  | X                                      |
| <b>2</b> 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))  |                          |     |  |
| <b>a</b> At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? . . . . .  | <input type="checkbox"/> | Yes | <input checked="" type="checkbox"/> No |
| If "Yes," list the years ► 20 __, 20 __, 20 __, 20 __   |                          |     |  |
| <b>b</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 the instructions) . . . . .  |                          | 2b  | X                                      |
| <b>c</b> If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20 __, 20 __, 20 __, 20 __   |                          |     |  |
| <b>3a</b> 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>b</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) . . . . . |                          | 3b  | X                                      |
| <b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . .   |                          | 4a  | X                                      |
| <b>b</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  | X                                      |

**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))? . . . . .   | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |     |                              |                             |
| (2) | Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? . . . . .   | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |     |                              |                             |
| (3) | Provide a grant to an individual for travel, study, or other similar purposes? . . . . .  | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> 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)? (see instructions) . . . . .   | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> 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? . . . . .   | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> 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 the instructions)? . . . . . |                              |  |     | 5b                           | X                           |
|     | 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 | <input type="checkbox"/> Yes | <input type="checkbox"/> 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? . . . . .   | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |     |                              |                             |
| b   | Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.  |                              |  |     | 6b                           | X                           |
| 7a  | At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? .  | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |     |                              |                             |
| b   | If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? .   |                              |  |     | 7b                           | X                           |

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

| 1 List all officers, directors, trustees, foundation managers and their compensation (see the Instructions). |   |   |   |                                       |
|--|---|---|---|---------------------------------------|
| (a) Name and address   | (b) Title, and avg hours per week devoted to position | (c) Compensation (if not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred comp | (e) Expense account, other allowances |
| SEE ATTACHMENT #14   |   |   |   |                                       |

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

| (a) Name and address of each employee paid more than \$50,000 | (b) Title, and avg. 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 (see the instructions). 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** ..... ►

**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 SEE ATTACHMENT #15</b>  | <b>43,091</b> |
| <b>2</b>   |               |
| <b>3</b>   |               |
| <b>4</b>   |               |

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

| 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>2</b>  |        |
| All other program-related investments. See the instructions.  |        |
| <b>3</b>  |        |

**Total. Add lines 1 through 3** ..... ►

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

|  |    |           |
|--|----|-----------|
| 1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:    |    |           |
| a Average monthly fair market value of securities  | 1a | 4,574,087 |
| b Average of monthly cash balances   | 1b | 238,573   |
| c Fair market value of all other assets (see the instructions)   | 1c | 27,247    |
| d Total (add lines 1a, b, and c)   | 1d | 4,839,907 |
| e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)      | 1e |           |
| 2 Acquisition indebtedness applicable to line 1 assets   | 2  |           |
| 3 Subtract line 2 from line 1d   | 3  | 4,839,907 |
| 4 Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see the instructions) | 4  | 72,599    |
| 5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4           | 5  | 4,767,308 |
| 6 Minimum investment return. Enter 5% of line 5  | 6  | 238,365   |

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

|   |    |         |
|---|----|---------|
| 1 Minimum investment return from Part X, line 6   | 1  | 238,365 |
| 2a Tax on investment income for 2009 from Part VI, line 5   | 2a | 3,282   |
| b Income tax for 2009. (This does not include the tax from Part VI)                                 | 2b |         |
| c Add lines 2a and 2b   | 2c | 3,282   |
| 3 Distributable amount before adjustments. Subtract line 2c from line 1                             | 3  | 235,083 |
| 4 Recoveries of amounts treated as qualifying distributions   | 4  |         |
| 5 Add lines 3 and 4   | 5  | 235,083 |
| 6 Deduction from distributable amount (see the instructions)  | 6  |         |
| 7 Distributable amount as adjusted. Subtract line 6 from line 5 Enter here and on Part XIII, line 1 | 7  | 235,083 |

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

|  |    |         |
|--|----|---------|
| 1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes  | 1a | 290,387 |
| a Expenses, contributions, gifts, etc. -- total from Part I, column (d), line 26   | 1b |         |
| b Program-related investments -- total from Part IX-B  | 2  |         |
| 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes  | 3a |         |
| 3 Amounts set aside for specific charitable projects that satisfy the:   | 3b |         |
| a Suitability test (prior IRS approval required)   | 4  | 290,387 |
| b Cash distribution test (attach the required schedule)  | 5  | 3,282   |
| 4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.  | 6  | 287,105 |
| 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 the instructions) |    |         |
| 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

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

|  | (a)<br>Corpus | (b)<br>Years prior to 2008 | (c)<br>2008 | (d)<br>2009 |
|--|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2009 from Part XI, line 7 . . . . .   |               |                            |             | 235,083     |
| 2 Undistributed income, if any, as of the end of 2009  |               |                            |             |             |
| a Enter amount for 2008 only . . . . .   |               |                            |             |             |
| b Total for prior years 2000, 2001, 2002 . . . . .   |               |                            |             |             |
| 3 Excess distributions carryover, if any, to 2009  |               |                            |             |             |
| a From 2004 . . . . .  | 41,411        |                            |             |             |
| b From 2005 . . . . .  | 31,563        |                            |             |             |
| c From 2006 . . . . .  | 33,987        |                            |             |             |
| d From 2007 . . . . .  | 28,432        |                            |             |             |
| e From 2008 . . . . .  | 66,981        |                            |             |             |
| f Total of lines 3a through e . . . . .  | 202,374       |                            |             |             |
| 4 Qualifying distributions for 2009 from Part XII, line 4 ► \$ 290,387   |               |                            |             |             |
| a Applied to 2008, but not more than line 2a   |               |                            |             |             |
| b Applied to undistributed income of prior years (Election required -- see the instructions) . . . . .   |               |                            |             |             |
| c Treated as distributions out of corpus (Election required -- see the instructions)   |               |                            |             |             |
| d Applied to 2009 distributable amount . . . . .   |               |                            |             | 235,083     |
| e Remaining amount distributed out of corpus . . . . .   | 55,228        |                            |             |             |
| 5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))   |               |                            |             |             |
| 6 Enter the net total of each column as indicated below:   | 257,602       |                            |             |             |
| a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5  |               |                            |             |             |
| b Prior years' undistributed income. Subtract line 4b from line 2b . . . . .   |               |                            |             |             |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed . . . . . |               |                            |             |             |
| d Subtract line 6c from line 6b. Taxable amount -- see the instructions . . . . .  |               |                            |             |             |
| e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount -- see the instructions . . . . .   |               |                            |             |             |
| f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010. . . . .   |               |                            |             |             |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see the instructions) . . . . .                              |               |                            |             |             |
| 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see the instructions) . . . . .  | 41,411        |                            |             |             |
| 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a . . . . .  | 216,191       |                            |             |             |
| 10 Analysis of line 9:   |               |                            |             |             |
| a Excess from 2005 . . . . .   | 31,563        |                            |             |             |
| b Excess from 2006 . . . . .   | 33,987        |                            |             |             |
| c Excess from 2007 . . . . .   | 28,432        |                            |             |             |
| d Excess from 2008 . . . . .   | 66,981        |                            |             |             |
| e Excess from 2009 . . . . .   | 55,228        |                            |             |             |

**Part XIV Private Operating Foundations** (see instructions and Part VII-A, question 9)

|     |   |   |               |            |  |
|-----|---|---|---------------|------------|--|
| 1a  | If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling ..... | ► | N/A           |            |  |
| b   | Check box to indicate whether the foundation is a private operating foundation described in section   |   | 4942(j)(3) or | 4942(j)(5) |  |
| 2a  | Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed .....   |   |               |            |  |
| b   | 85% of line 2a .....  |   |               |            |  |
| c   | Qualifying distributions from Part XII, line 4 for each year listed .....   |   |               |            |  |
| d   | Amounts included in line 2c not used directly for active conduct exempt act .....   |   |               |            |  |
| e   | Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c .....  |   |               |            |  |
| 3   | Complete 3a, b, or c for the alternative test relied upon:  |   |               |            |  |
| a   | "Assets" alternative test -- enter:   |   |               |            |  |
| (1) | Value of all assets .....   |   |               |            |  |
| (2) | Value of assets qualifying under section 4942(j)(3)(B)(i) .....   |   |               |            |  |
| b   | "Endowment" alternative test -- enter 2/3 of min investment return shown in Part X, line 6 for each year listed .....   |   |               |            |  |
| c   | "Support" alternative test -- enter:  |   |               |            |  |
| (1) | Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) .....                                 |   |               |            |  |
| (2) | Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) .....  |   |               |            |  |
| (3) | Largest amount of support from an exempt organization .....   |   |               |            |  |
| (4) | Gross investment income .....   |   |               |            |  |

**Part XV Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year -- see the instructions.)**1 Information Regarding Foundation Managers:**

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

**NONE**

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

**NONE****2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

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

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

**SEE ATTACHMENT 16**

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

**SEE ATTACHMENT 16**

c Any submission deadlines

**SEE ATTACHMENT 16**

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

**SEE ATTACHMENT 16**

**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)                 |   |                                |                                  |                     |
| a Paid during the year<br><b>SEE ATTACHMENT #17</b> |   |                                |                                  |                     |
| <b>Total</b> .....                                  |   |                                |                                  | ► 3a <b>135,000</b> |
| b Approved for future payment                       |   |                                |                                  |                     |
| <b>Total</b> .....                                  |   |                                |                                  | ► 3b                |

**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)<br>Related or exempt<br>function income<br>(See the<br>instructions.) |
|--|---------------------------|---------------|--------------------------------------|---------------|---|
|  | (a)<br>Business<br>code   | (b)<br>Amount | (c)<br>Excl.<br>code                 | (d)<br>Amount |   |
| 1 Program service revenue                                  |                           |               |                                      | 9,000         |   |
| a SEE ATTACHMENT #18                                       |                           |               |                                      |               |   |
| b  |                           |               |                                      |               |   |
| c  |                           |               |                                      |               |   |
| d  |                           |               |                                      |               |   |
| e  |                           |               |                                      |               |   |
| f  |                           |               |                                      |               |   |
| g Fees & contracts from government agencies                |                           |               |                                      |               |   |
| 2 Membership dues and assessments                          |                           |               |                                      |               |   |
| 3 Interest on savings and temporary cash investments       |                           |               |                                      |               |   |
| 4 Dividends and interest from securities                   |                           |               | 14                                   | 166,243       |   |
| 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                                  | 525990                    | 35            | 14                                   | 7,538         |   |
| 8 Gain or (loss) from sales of assets other than inventory |                           |               | 18                                   | 192,314       |   |
| 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)                  |                           | 35            |                                      | 375,095       | 0   |
| 13 Total. Add line 12, columns (b), (d), and (e)           |                           |               |                                      | 13            | 375,130   |

(See worksheet in line 13 instructions to verify calculations)

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

| Line No.<br>▼      | Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See the instructions) |
|--------------------|---|
| SEE ATTACHMENT #19 |   |

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

|  | Yes   | No |
|--|-------|----|
| 1 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?  |       |    |
| a Transfers from the reporting foundation to a noncharitable exempt organization of  |       |    |
| (1) Cash . . . . .   | 1a(1) | X  |
| (2) Other assets . . . . .   | 1a(2) | X  |
| b Other transactions   |       |    |
| (1) Sales of assets to a noncharitable exempt organization . . . . .   | 1b(1) | X  |
| (2) Purchases of assets from a noncharitable exempt organization . . . . .   | 1b(2) | X  |
| (3) Rental of facilities, equipment, or other assets . . . . .   | 1b(3) | X  |
| (4) Reimbursement arrangements . . . . .   | 1b(4) | X  |
| (5) Loans or loan guarantees . . . . .   | 1b(5) | X  |
| (6) Performance of services or membership or fundraising solicitations . . . . .   | 1b(6) | X  |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees . . . . .   | 1c    | X  |
| d 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. |       |    |

| (a) Line no. | (b) Amount involved | (c) Name of noncharitable exempt organization | (d) Description of transfers, transactions, and sharing arrangements |
|--------------|---------------------|---|--|
|              |                     |   |  |

2 a 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 |
|--------------------------|--------------------------|---------------------------------|
|                          |                          |                                 |

|   |  |  |   |   |
|---|--|--|---|---|
| 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  | <i>Linda Peckart</i>   |  | Date  | <i>2/8/11</i>   |
|   | Signature of officer or trustee                                |  | Date  | <i>2/8/11</i>   |
| HIRE  | Paid Preparer's signature                                      | Date                                       | Check if self-employed <input type="checkbox"/> | Preparer's identifying number (see Signature in the instructions) |
| USE ONLY  | Firm's name (or yours if self-employed), address, and ZIP code | <i>DIAMOND &amp; ASSOCIATES, PC, CPA'S</i> | <i>1/29/11</i>                                  | <i>P01317692</i>  |
|   |  | <i>3 FRIENDS LANE SUITE 300</i>            | <i>EIN 23 3064611</i>                           |   |
|   |  | <i>NEWTOWN, PA 18940-3426</i>              | <i>Phone no (215) 497-8888</i>                  |   |

**Schedule B**(Form 990, 990-EZ,  
or 990-PF)Department of the Treasury  
Internal Revenue Service**Schedule of Contributors**

► Attach to Form 990, 990-EZ, or 990-PF.

OMB No. 1545-0047

**2009****Name of the organization****STOCKTON RUSH BARTOL FOUNDATION****Employer identification number****23-2318470****Organization type (check one).****Filler of:****Section:**

Form 990 or 990-EZ

 501(c)( ) (enter number) organization 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation 527 political organization

Form 990-PF

 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation**Check if your organization is covered by the General Rule or a Special Rule.****Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions**General Rule**

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

**Special Rules**

For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year ► \$ \_\_\_\_\_

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

**For Privacy Act and Paperwork Reduction Act Notice, see the Instructions  
for Form 990, 990-EZ, or 990-PF.**

**Schedule B (Form 990, 990-EZ, or 990-PF) (2009)**

**Name of organization**

## STOCKTON RUSH BARTOL FOUNDATION

**Employer Identification number**

23-2318470

**Part I** **Contributors** (see instructions)

| (a)<br>No. | (b)<br>Name, address, and ZIP + 4 | (c)<br>Aggregate contributions | (d)<br>Type of contribution  |
|------------|-----------------------------------|--------------------------------|--|
| 1          | WYNCOTE FOUNDATION                |                                |  |
|            | 1717 ARCH STREET, 14TH FLOOR      | \$ 25,000                      | <input checked="" type="checkbox"/> Person<br><input type="checkbox"/> Payroll<br><input type="checkbox"/> Noncash |
|            |                                   |                                | (Complete Part II if there is a noncash contribution.)   |
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## PROPOSAL SUMMARY FORM

Application Deadline: Received by Monday, May 2nd, 2011 at 5:00 pm.



Organization Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_ Web site: \_\_\_\_\_

Executive Director: \_\_\_\_\_ \$ \_\_\_\_\_ Amount requested

Primary Contact: \_\_\_\_\_ \$ \_\_\_\_\_ Organizational revenues for  
(if different) last completed fiscal yearFiscal Sponsor: \_\_\_\_\_ \$ \_\_\_\_\_ Organizational budget  
(if applicable) for current year

Fiscal year begins \_\_\_\_\_

Request is for:  General Operating Support  Project Support  
(select one) \$ \_\_\_\_\_ Project budget\$ \_\_\_\_\_ Funds committed to  
project to date

If applicable, project description (ten words or less).

 Yes  No Is this your first application  
to the Bartol Foundation?

Mission:

Brief historical sketch of organization (as context for this request):

## Please check off required attachments:

- Proposal Summary Form: 2 copies
- Proposal Narrative, (no more than 3 pages): 2 copies
- Project budget, with funds committed to date, if project support is requested: 2 copies
- Current year organizational budget
- Most recent audited financial statements or, if unavailable, most recent 990
- List of Board of Directors with affiliations
- Annual report or overview of activities for the past year
- Selected supplemental materials
- IRS determination letter for 501(c)(3) status, first time applicants only.
- I certify that our determination letter from the Internal Revenue Service (IRS), which states we qualify as an organization described in section 501(c)(3) and as a public charity described in either Section 509(a)(1) or 509(a)(2) of the Internal Revenue code, is still in effect.

 Please do not  
staple together  
applications.

# Barto, Foundation Grants 2010

|                               |                         |                 |    |         |                                    |           |
|-------------------------------|-------------------------|-----------------|----|---------|------------------------------------|-----------|
| 1812 Productions              | 421 N 7th St. Suite 218 | Philadelphia    | PA | 19123   | Outreach Education Programs        | 4957 5000 |
| Academy of Community Music    | 601 Bethlehem Pike      | Fort Washington | PA | 19034   | Crescendo Pre-School Music Program | 4958 5000 |
| Al-Bustan Seeds of Culture    | 526 S. 46th St.         | Philadelphia    | PA | 19143   | General operating support          | 4959 5000 |
| Art Sanctuary                 | 1801 West Diamond St.   | Philadelphia    | PA | 19121-1 | General operating support          | 4960 5000 |
| Art-Reach                     | 1819 JFK Blvd.          | Philadelphia    | PA | 19103   | Arts Accessibility Programs        | 4961 5000 |
| Arts and Spirituality Center  | 3723 Chestnut St.       | Philadelphia    | PA | 19104   | 'We, the Poets' Program            | 4962 5000 |
| Asian Arts Initiative         | 1219 Vine St.           | Philadelphia    | PA | 19107   | General operating support          | 4963 5000 |
| Black Pearl Chamber Orchestra | PO Box 25206            | Philadelphia    | PA | 19119   | General operating support          | 4964 5000 |
| Commonwealth Youthchoirs      | 35 West Chelten Ave     | Philadelphia    | PA | 19144   | Vocal music school residency       | 4965 5000 |
| Community Education Center    | 3500 Lancaster Avenue   | Philadelphia    | PA | 19104-4 | General operating support          | 4966 5000 |
| FreshVisions Youth Theatre    | 4821 Germantown Ave.    | Philadelphia    | PA |         | General operating support          | 4967 5000 |
| Intercultural Family Services |                         |                 |    |         |                                    |           |

STOCKTON RUSH BARTOL Foundation

EIN: 23-2318470

ATTACHMENT 17

FORM 990-PF, PAGE 11, PART XV, LINE 3A

9-30-2010

|                                    |                                |              |    |         |                                       |            |
|------------------------------------|--------------------------------|--------------|----|---------|---------------------------------------|------------|
| Koresh Dance Company               | 4225 Chestnut St.              | Philadelphia | PA | 19104   | Music and Mentorship Program          | 4968 5000  |
| Kun-Yang Lin/Dancers               | 2020 Chestnut St.              | Philadelphia | PA | 19103   | Koresh Kids Dance Residencies         | 4969 5000  |
| Leah Stein Dance Company           | 1316 South 9th St.             | Philadelphia | PA | 19147   | General operating support             | 4970 5000  |
| Musicopia                          | 130 E. Cliveden St.            | Philadelphia | PA | 19119   | Dance residencies in schools          | 4971 5000  |
| Norris Square Neighborhood Project | 2001 Market St, Suite 3100     | Philadelphia | PA | 19103   | Music Composition Residency           | 4972 5000  |
| OASIS                              | 2141 N. Howard St.             | Philadelphia | PA | 19122   | Youth arts programs                   | 4973 5000  |
| Philadelphia Dance Projects        | 340 N 12th St., Suite 415      | Philadelphia | PA | 19107   | Artists-in-Residence                  | 4974 5000  |
| Philadelphia Folklore Project      | 1427 Spruce St, Suite 1F       | Philadelphia | PA | 19102   | General operating support             | 4975 5000  |
| Philadelphia Young Playwrights     | 735 S. 50th St.                | Philadelphia | PA | 19143   | Folk Arts Education Programs          | 4976 5000  |
| Print Center                       | 1709 Ben Franklin Parkway, 2   | Philadelphia | PA | 19103-1 | Playwrighting Program                 | 4977 5000  |
| Scribe Video Center                | 1614 Latimer Street            | Philadelphia | PA | 19103   | Artists-in-Schools Program            | 4978 5000  |
| Spiral Q Puppet Theater            | 4212 Chestnut St. 3rd floor    | Philadelphia | PA | 19104   | Documentary History Project for Youth | 4979 5000  |
|                                    | 3114 Spring Garden St., 2nd fl | Philadelphia | PA | 19104   | Education Initiatives                 | 4980 10000 |

Taller Puertorriqueno

|                       |                            |              |    |       |   |                        |
|-----------------------|----------------------------|--------------|----|-------|---|------------------------|
| Taller Puertorriqueno | 2721 N. 5th St.            | Philadelphia | PA | 19133 | "Growing Green: Art and Nature" Education | 4981 5000              |
| Tree House Books      | 1430 W. Susquehanna Avenue | Philadelphia | PA | 19121 | Artist-in-Residence Program               | 4982 5000              |
|                       |                            |              |    |       |   | <u><u>(35,000)</u></u> |