

See a Social Security Number? Say Something! Report Privacy Problems to https://public.resource.org/privacy Or call the IRS Identity Theft Hotline at 1-800-908-4490



Form **990-PF**

Return of Private Foundation

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

Department of the Treasury

OMB No 1545-0052

Interna	al Reve	nue Service Note. The foundation may b	e able to use a copy of this	return to satisfy state repo	rting requirements.	
For c	alend	ar year 2009, or tax year beginning OCT	1, 2009	, and ending	SEP 30, 2010	
G C	heck a	all that apply: Initial return Amended return	Initial return of a fo Address chang	·	Final return	1
ia	the II	DR. HERBERT AND NICOL	E WERTHEIM FA	AMILY	A Employer identification 59–1778605	
	erwis orint	Number and street (or P O box number if mail is not de	livered to street address)	Room/suite	8 Telephone number	·
•	type.	·	ŕ		(305)264-4	465
	Spec	fic City or town state and ZIP code			C If exemption application is p	, ₋
lnstr	uctio	MIAMI, FL 33155			D 1. Foreign organizations	
H C	٦.	type of organization: X Section 501(c)(3) ex	• •		Foreign organizations me check here and attach co	peting the 85% test, proputation
			Other taxable private founda		E If private foundation sta	
		ket value of all assets at end of year J Accounting		X Accrual	under section 507(b)(1)	
<i>(III</i>		· · · · · · · · · · · · · · · · · · ·	her (specify) mn (d) must be on cash b	hasis)	F If the foundation is in a	
	rt I	Analysis of Revenue and Expenses			under section 507(b)(1)	(d) Disbursements
		(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	for charitable purposes (cash basis only)
	1	Contributions, gifts, grants, etc., received			N/A	(Casi vasis (III))
		Check X if the foundation is not required to attach Sch. B				
	3	Interest on savings and temporary cash investments	4,122.	4,122.		STATEMENT 1
	4	Dividends and interest from securities	71,208.	71,208		STATEMENT 2
	5a	Gross rents				
	Ь	Net rental income or (loss)				
•	6a	Net gain or (loss) from sale of assets not on line 10	1,866,896.			·
ž	ь	Gross sales price for all assets on line 6a 3,095,000.				
Revenue	7	Capital gain net income (from Part IV, line 2)		1,866,896	•	
ď	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	Ь	Less Cost of goods square CI				
	C	Gross profit or (loss)				
	11	Other in bottom				
	12	Total, Accelines All fough 150 2011 Q	1,942,226.	1,942,226		
	13	Compensation of officers, directors, trustees, etc	0.	0.	•	0.
	14	Other employee salaries and wages				
v	15	Pension-plans, employee benefits				
A)	16a	Legal fees				
ZWW. Expense	b	Accounting fees			ļ	
₩	C	Other professional fees				<u> </u>
₹ c.	17	Interest	22,758.	22,758		<u> </u>
g g	18	Interest Taxes STMT 3 Depreciation and depletion Occupancy Travel, conferences, and meetings	13,556.	390	•	30.
ii Si	19	Depreciation and depletion				
₹ Ę	20	Occupancy			 	<u> </u>
ב כ		Travel, conferences, and meetings				
and	22	Printing and publications	1 212			
Operating and	23 24 25	Other expenses STMT 4	1,313.	241	•	1,072.
ar et	24	Total operating and administrative	25.625		}	
Š		expenses. Add lines 13 through 23	37,627.	23,389		1,102.
) -		commoditions, grants para	3,106,000.			3,106,000.
	26	Total expenses and disbursements.	2 142 607	02.202		2 405 405
	-	Add lines 24 and 25	3,143,627.	23,389	· 	3,107,102.
	i	Subtract line 26 from line 12:	1 201 401			
	1 .	Excess of revenue over expenses and disbursements	-1,201,401.	1 010 027	 	
	1	Net investment income (if negative, enter -0-)		1,918,837		
9235	C 01 2-10	Adjusted net income (if negative, enter -0-)	Ant Mating and the feet	A:	N/A	Fa 000 DE (00000
02-0	2-10	LHA For Privacy Act and Paperwork Reduction	AUI NOUCE, SEE INE INSTIUC	เนบทร.		Form 990-PF (2009)

Forn	n 99(P-PF (2009) FOUNDATION, INC.	T-	<u>59-1</u>	L778605 Page 2
D:	art I	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of	
		column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
1	1	Cash - non-interest-bearing			
		Savings and temporary cash investments	20,271.	13,344.	13,344.
İ		Accounts receivable			
Ì		Less: allowance for doubtful accounts			
		Pledges receivable ▶			
1		Less: allowance for doubtful accounts			
	_	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
ĺ	,	disqualified persons			
	7	Other notes and loans receivable Less; allowance for doubtful accounts			
,	8	Inventories for sale or use			
Assets		Prepaid expenses and deferred charges			
As	i	Investments - U.S. and state government obligations			·
		Investments - corporate stock STMT 5	7,880,395.	6,790,381.	9,275,605.
		Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis			
		Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other STMT 6	60,108.	56,228.	127,900.
	14	Land, buildings, and equipment; basis ▶			
		Less accumulated depreciation			
	15	Other assets (describe ► STATEMENT 7)	292,833.	298,564.	298,564.
		The second the base and baselines	0 252 607	7 150 517	0 715 413
	Т.	Total assets (to be completed by all filers)	8,253,607.	7,158,517.	9,715,413.
	18	Accounts payable and accrued expenses Grants payable			
"	19	Deferred revenue	· · · · · · · · · · · · · · · · · · ·		
ıţie	20	Loans from officers, directors, trustees, and other disqualified persons	1,646,493.	1,646,415.	STATEMENT 8
Liabilıties	i	Mortgages and other notes payable	2701071301	1/010/1200	DILLI MILLIAN O
Ë	1	Other liabilities (describe STATEMENT 9)	1,920,663.	2,027,052.	
	23	Total liabilities (add lines 17 through 22)	3,567,156.	3,673,467.	
		Foundations that follow SFAS 117, check here			
S		and complete lines 24 through 26 and lines 30 and 31.			
Š	24	Unrestricted	4,686,451.	3,485,050.	
alai	25	Temporarily restricted			
or Fund Balances	26	Permanently restricted Foundations that do not follow SFAS 117, check here			
Ę	Ì	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
Net Assets		Paid-in or capital surplus, or land, bldg., and equipment fund			
Ass	1	Retained earnings, accumulated income, endowment, or other funds			
ét	30	Total net assets or fund balances	4,686,451.	3,485,050.	
_					
	31	Total liabilities and net assets/fund balances	8,253,607.	7,158,517.	
F	art	III Analysis of Changes in Net Assets or Fund Ba	lances		
				 	
1		il net assets or fund balances at beginning of year - Part II, column (a), line 3	30		4 606 451
_	•	st agree with end-of-year figure reported on prior year's return) er amount from Part I, line 27a			4,686,451. -1,201,401.
2 3		er amount from Part 1, line 27a er increases not included in line 2 (itemize)		2	-1,201,401. 0.
3		lines 1, 2, and 3		3	3,485,050.
5		reases not included in line 2 (itemize)		5	0.
_		al net assets or fund balances at end of year (line 4 minus line 5) - Part II, col	lumn (b), line 30	6	3,485,050.
_					Form 990-PE (2000)

923511 02-02-10

DR. HERBERT AND NICOLE WERTHEIM FAMILY Form 990-PF (2009) FOUNDATION. INC. 59-1778605 Page 3 Capital Gains and Losses for Tax on Investment Income Part IV (b) How acquired (c) Date acquired (a) List and describe the kind(s) of property sold (e.g., real estate, (d) Date sold - Purchase (mo., day, yr.) 2-story brick warehouse; or common stock, 200 shs. MLC Co.) (mo., day, yr.) D - Donation 07/08/02 1a 1000 SH. CIT GROUP INC. 12/16/09 b 236 SH. GLOBAL CROSSING LTD P 06/19/00 02/18/10 c 50000 SH HEICO CORP P 02/17/99 08/26/10 d 50000 SH HEICO CORP P 02/17/99 08/26/10 (g) Cost or other basis (f) Depreciation allowed (h) Gain or (loss) (e) Gross sales price (or allowable) plus expense of sale (e) plus (f) minus (g) <u>23,000</u>. -23,000. 3,000. -3,000.b 1,547,500 601,052. 946,448. C 1,547,500 601,052 946,448. d е 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 (j) Adjusted basis (k) Excess of col. (i) (i) F.M.V. as of 12/31/69 Losses (from col. (h)) as of 12/31/69 over col. (j), if any -23<u>,000</u>. -3,000.b 946,448. 946,448. If gain, also enter in Part I, line 7 1,866,896. 2 Capital gain net income or (net capital loss) 2 If (loss), enter -0- in Part I, line 7 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). N/A If (loss), enter -0- in Part I, line 8 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. 🗌 Yes 🕱 No Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part. Enter the appropriate amount in each column for each year; see instructions before making any entries. (d)
Distribution ratio
(col. (b) divided by col. (c)) (a) Base period years (c) Adjusted qualifying distributions Net value of noncharitable-use assets Calendar year (or tax year beginning in) 1,363,575 5,676,692. .240206 2008 495,276. 10,,001,487. .049520 2007 1,088,612 9,689,514. .112349 2006 719,976. 7,421,361 2005 .097014 2004 6,500 771.214. .001362 2 <u>.500451</u> 2 Total of line 1, column (d) 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 .100090

2 .500451
3 .100090
4 7,320,583.
5 732,717.
6 19,188.
7 751,905.

6 Enter 1% of net investment income (1% of Part I, line 27b)7 Add lines 5 and 6

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

8 Enter qualifying distributions from Part XII, line 4

Multiply line 4 by line 3

923521 02-02-10

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.

Form **990-PF** (2009)

3,109,102.

DR. HERBERT AND NICOLE WERTHEIM FAMILY Form 990-PF (2009) FOUNDATION, 59-1778605 Page 4 Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions Part VI 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 X and enter 1% 19,188. 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) Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 Add lines 1 and 2 3 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 4 5 188. Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-Credits/Payments: a 2009 estimated tax payments and 2008 overpayment credited to 2009 7,237 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 Enter any penalty for underpayment of estimated tax. Check here _____ if Form 2220 is attached 8 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 12.020. 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 11 Enter the amount of line 10 to be: Credited to 2010 estimated tax Refunded > 11 Part VII-A Statements Regarding Activities No 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in Yes any political campaign? 1a X b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? X 1b 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. c Did the foundation file Form 1120-POL for this year? X 1c d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (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 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 2 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4a b If "Yes," has it filed a tax return on Form 990-T for this year? N/A 4b 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5 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? Х 6

Form **990-PF** (2009)

Х

X

X

7

8b

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

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

of each state as required by General Instruction G? If "No," attach explanation

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)

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

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

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

_		<u>-17786</u>	05		Page 5
Pa	art 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		Х
12	Qid the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?		12		х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A		13	Х	
14	The books are in care of ▶ BPI ACCOUNTING DEPARTMENT Telephone no. ▶ 3	305-264 P+4 ▶331		465	
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			 /A	
P	art VII-B Statements Regarding Activities for Which Form 4720 May Be Required	<u> </u>	1/1	<u> </u>	-
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		7	Yes	No
1:	a During the year did the foundation (either directly or indirectly):	X No		163	110
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? X Yes	No No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	X No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available	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.) b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations	X No			
	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	▶□	1b		Х
	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?		10		х
2	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)):		ļ		
	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?	X No			
	If "Yes," list the years,,,,,				
	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b		
	c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.				
3	3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes	X No			

b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C,

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that

Form 4720, to determine if the foundation had excess business holdings in 2009.)

had not been removed from jeopardy before the first day of the tax year beginning in 2009?

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

Form **990-PF** (2009)

4a

X

N/A

DR. HERBERT AND NICOLE WERTHEIM FAMILY Form 990-PF (2009) FOUNDATION, INC. 59-1778605 Page 6 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: Yes X No (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, Yes X No any voter registration drive? Yes X No (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 Yes X No. 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 Yes X No the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations N/A section 53.4945 or in a current notice regarding disaster assistance (see instructions)? 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 __ Yes 🔲 No expenditure responsibility for the grant? N/A 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 Yes X No a personal benefit contract? 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. Yes X No 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? 7h Information About Officers, Directors, Trustees, Foundation Managers, Highly Part VIII Paid Employees, and Contractors List all officers, directors, trustees, foundation managers and their compensation. (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 (If not paid, enter -0-) (a) Name and address allowances DR. HERBERT A. WERTHEIM PRESIDENT 4470 SW 74TH AVENUE MIAMI, FL 33155 0.00 0 0 0. SECRETARY NICOLE J.D. WERTHEIM 4470 SW 74TH AVENUE 0. 0.00 0 0 MIAMI, FL 33155 ERICA WERTHEIM ZOHAR DIRECTOR 4470 SW 74TH AVENUE MIAMI, FL 33155 0.00 0. 0 0. VANESSA V. WERTHEIM BRUMER DIRECTOR 4470 SW 74TH AVENUE 33155 0.00 0 0 0. 25

2 Compensation of five highest-paid employees (other than tho	se 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, othe allowances
NONE				
			 	
Total number of other employees paid over \$50,000				

DR. HERBERT AND NICOLE WERTHEIM FAMILY

orm 990-PF (2009) FOUNDATION, INC.	59-1	L778605 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Manage Paid Employees, and Contractors (continued)		
3 Five highest-paid independent contractors for professional services. If none, enter "NONE."		
(a) Name and address of each person paid more than \$50,000 (b)	Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		▶ 0
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information su	ch as the	
number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.		Expenses
1 N/A		
2		
3		
4		
D MYDIO		
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
1N/A		
2		
All other program related investments Conventions		
All other program-related investments. See instructions.		
3		
Total, Add lines 1 through 3	>	0.
Total, riss miss i tillosquis		

Page 8

P	art X Minimum Investment Return (All domestic foundations must complete this part Foreign four	ndations	s, see instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:	·- ·- ·	
a	Average monthly fair market value of securities	1a	10,780,142.
b	Average of monthly cash balances	1b	16,807.
	Fair market value of all other assets	1c	295,698.
đ	Total (add lines 1a, b, and c)	1d	11,092,647.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	3,660,583.
3	Subtract line 2 from line 1d	3	7,432,064.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	111,481.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	7,320,583.
6	Minimum investment return. Enter 5% of line 5	6	366,029.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here and do not complete this part.)	id certair	
1	Minimum investment return from Part X, line 6	1	366,029.
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.)	1	
C	Add lines 2a and 2b	2c	19,188.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	346,841.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	346,841.
6	Deduction from distributable amount (see instructions)	6	0.
7_	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	346,841.
F	art XII Qualifying Distributions (see instructions)	-	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	l 1a	3,107,102.
b		1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	2,000.
3	Amounts set aside for specific charitable projects that satisfy the:	-	
а		3a	
ь		3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	3,109,102.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		0,200,1021
-	income. Enter 1% of Part I, line 27b	5	19,188.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	3,089,914.
-	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation (4940(e) reduction of tax in those years.		

Part XIII Undistributed Income (see instructions)

Distributable amount for 2009 from Part XI, Inc. 7 346 , 841 .	,	(a)	(b)	(c)	(d)
Image	· [_			
2 Underwinder deceme. As we, as of the send of 3009 a Children and the COURD only b Total for priner years: 3 Excess distributions carryover, if any, to 2009: a From 2004 b From 2005 c From 2006 c From 2006 c From 2007 c From 2008 c From 2007 c From 2008 c From 2007 c From 2008 c From 2009	1 Distributable amount for 2009 from Part XI,				
a Enter amount for 2008 only	line 7				346,841.
\$ Excess distributions carryover, if any, to 2009: a From 2006 From 2006 From 2006 From 2007 From 2008 From 2008 From 2008 From 2008 From 2008 From 2008 From 2009 Fro	2 Undistributed income, if any, as of the end of 2009		!	_	
3 Excess distributions carryover, if any, to 2009: a From 2004 b From 2005 c From 2006 d From 2007 c From 2008 d From 2007 e From 2008 d				0.	
3 Excess distributions carryover, if any, to 2009: a From 2006 b From 2005 c From 2007 e From 2008 c From 2009 c F	b Total for prior years:				
a From 2004 b From 2005 c From 2006 d From 2007 e From 2008	e Evenes distributions agrayover if any to 2000		<u> </u>		
From 2006 From 2007 From 2008 From 2008 From 2008 From 2009 From 2	1 1 1				
e From 2006 d From 2007 d From 2007 d From 2008 d From 2009 d From 2009 d G63 , 245. 1 Total of lines 8 a through e 4 Qualyhing distributions for 2009 from Pan XII, line 4: ▶ \$ 3,109,102, a Applied to 2008, but not more than line 2a Applied to 2008, but not more than line 2a Applied to 2008 but not more than line 2a Applied to 2008 dustributible or corpus (Election required - see instructions) C Treated as distributions out of corpus (Election required - see instructions) C (Applied to 2008 distributible amount e Remaining amount distributed out of corpus S Excess distributions earryover applied to 2009 and the second of the see and the second of					
d From 2007 e From 2008	• · · • · · · · · · · · · · · · · · · ·				
e From 2008					
I Total of lines 3s through e 4 Qualifying distributions for 2009 from Part XI, line 4 1 ► S 3,109,102. Applied to 2008, but not more than line 2s Applied to 2008, but not more than line 2s Applied to 2008 but not more than line 2s Expected as distributions out of corpus (Election required - see instructions) Applied to 2009 distributable amount (Election required - see instructions) Applied to 2009 distributable amount (Election required - see instructions) Applied to 2009 distributable amount (Election required - see instructions) Applied to 2009 distributable amount (Election required - see instructions) Applied to 2009 distributable amount (Election required - see instructions) Applied to 2009 distributable amount (Election required - see instructions) Compared an instruction of corpus See instruction receiver (sign) Applied to 2009 distribution and indicated below: A corpus Add instal of a can disk subtract line 5 B Prior years' undistributed income to which a notice of deficiency has been insued, or on which the sotion 4942(a) tax has been previously assessed Subtract line 6 from line 6 b. Taxable amount - see instructions Undistributed income for 2008. Subtract line 4 af rom line 2 a Taxable amount - see instructions Undistributed income for 2009. Subtract lines 4 da and 5 from line 1. This amount must be distributed in 2010 Amounts readed as distributions carryover from 2004 To Amounts readed as distributio					
4 Qualifying distributions for 2009 from Part XII, line 4: PS 3, 109, 102. 4 Applied to 2008, but not more than line 2a 5 Applied to indistributed income of prory years (Election required - see instructions) 6 Treated as distributions out of corpus (Election required - see instructions) 6 Applied to 2009 distributable amount 8 Remaining amount distributed out of corpus 6 Ecoses distributions corpure appears in 2009 off as mount appears in column (a), the same amount must be above in column (a), the same amount must be above in column (a). 8 Enter the net total of each column as indicated below: 1 Corpus Add lines 2f, 4c, and 4e Subtract line 5 1 Prior years' undistributed income. Subtract line 6b from line 2b 2 Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 494(a) tax has been previously assessed 3 , 425,506. 5 O . 2 Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 494(a) tax has been previously assessed 4 Subtract line 6c from line 6b. Taxable amount - see instructions 9 Undistributed income for 2009. Subtract line 4 from line 2a. Taxable amount - see instructions 1 Undistributed income for 2009. Subtract lines 44 and from line 2a. Taxable amount - see instructions 1 Undistributed income for 2009. Subtract lines 44 and 5 from line 1. This amount must libe distributions curryore from 2004 2 Excess distributions carryore trought of the series	·	663,245.			
Part XI, line 4: ► ► \$ 3,109,102. a Appled to 2008, but not more than line 2a b Appled to undistributed income of pror years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Appled to 2009 distributable amount efferance amount distributed out of corpus (Election required - see instructions) Enemaning amount distributed out of corpus (Election required - see instructions) Enemaning amount distributed out of corpus (Election required - see instructions) Enemaning amount distributed out of corpus (Election required - see instructions) Enemaning amount distributed income (Election required - see instructions) Enter the amount distributed income. Subtract line 4 from line 2. Enter the amount of prior years' undistributed income for which a notice of deficiency has been insured, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2008. Subtract line 4 a from line 2. Taxable amount - see instructions e Undistributed income for 2008. Subtract line 4 a from line 2. Taxable amount - see instructions e Undistributed income for 2009. Subtract line 4 a from line 2. Taxable amount - see instructions e Undistributed income for 2009. Subtract line 4 a from line 2. Taxable amount - see instructions e Undistributed income for 2009. Subtract line 4 a from line 6b. 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) Excess distributions carryover for 2004 not applied on line 5 or line 7 9. Excess distributions carryover for 2004 not applied on line 5 or line 6a 10 Analysis of line 9: a Excess from 2006 Excess from 2007 d Excess from 2008 c Excess from 2009 2, 762, 261.					
b Applied to undistributed income of prior years (Election required - see instructions) c. Treated as distributions out of corpus (Election required - see instructions) d. Applied to 2009 distributable amount e Remaining amount distributed out of corpus 5. Excess distributions carryower applied to 2009 dri an amount appears in coloring (the same amount must be above in coloring its). 5. Excess distributions carryower applied to 2009 dri an amount appears in coloring (the same amount must be above in coloring its). 5. Excess distributions carryower applied to 2009 dri an amount appears in coloring (the same amount must be above in coloring its). 6. Enter the amount of prior years' undistributed income. Subtract line 4b from line 2b. 6. Enter the amount of prior years' undistributed income for viwhich a notice of deficiency has been issued or on which the section 494(2(a) tax has been previously assessed 4 Subtract line 6b. Taxable amount - see instructions 6. Undistributed income for 2008. Subtract line 4a from line 2. Taxable amount - see instructions 6. Undistributed income for 2008. Subtract line 4a from line 2. Taxable amount - see instructions 6. Undistributed income for 2008. Subtract line 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(b)(3) 8. Excess distributions carryover from 2004 not applied on line 5 or line 7 9. Excess from 2004 10. Analysis of line 9: 10. Analysis of line 9: 10. Analysis of line 9: 10. Excess from 2007 10. Excess from 2008 10. Excess from 2009 10. Ex					
years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2009 distributable amount e Remaining amount distributed out of corpus 5 Eccess distributions carryover explored at 2009 (iff an amount appears in column (st), the same amount must be aboven in ochumn (st). 6 Enter the net total of each column as indicated below: 1 Corpus Add Inne 31, e. and 14 Subtract loe 5 b Phor years' undistributed morne for which a notice of deficiency has been issued, or on which the section 494(3) tax has been previously assessed d Subtract line 66 from line 6b. Taxable amount - see instructions e Undistributed income for volum (st). 1 Undistributed income for 2008. Subtract line 4 a from line 2. 2 Taxable amount - see instructions 0 Undistributed income for 2008. Subtract line 4 a from line 2. Taxable amount - see instructions 1 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) (11)(f) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2009 c Excess from				0.	
c Treated as distributions out of corpus (Election required - see instructions) 4 Applied to 2009 distributible amount 6 Remaining amount distributed out of corpus 5 Excess distributions carryover in prolect files 6 Enter the net total of each column (a). 6 Enter the net total of each column as indicated below: 1 Corpus Add ines 3f, 4c, and 4e Subtract line 5 9 Prior years' undistributed morne. Subtract line 4b from line 2b 1 Center the amount of prior years' undistributed morne for which a notice of deficiency has been issued, or on which the section 4947(a) tax has been previously assessed 4 Subtract line 6c from line 6b. Taxable amount - see instructions 9 Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instructions 1 Undistributed morne for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010 1 Amounts feated as distributions out of corpus to saristy requirements imposed by section 170(b)(1)(F) or 4942(a)(3) 2 Excess distributions carryover from 2004 not applied on line 5 or line 7 3 Excess distributions carryover from 2004 not applied on line 5 or line 7 5 Excess from 2007 6 Excess from 2007 6 Excess from 2009 6 Excess from 2009 6 Excess from 2009 6 Excess from 2009 7 Excess from 2009 7 Excess from 2009 8 Excess from 2009 8 Excess from 2009 8 Excess from 2009 9 Excess from 2009 9 Excess from 2009 1 Excess from 2009 2 Excess from 2009 2 Excess from 2009 3 Excess from 2009 4 Excess from 2009 5 Excess from 2009 6 Excess from 2009 7 Excess from 2009 8 Excess from 2009 8 Excess from 2009 8 Excess from 2009 9 Excess fro	b Applied to undistributed income of prior				
(Election required - see instructions) d Applied to 2009 distributable amount e Remaining amount distributed to of corpus 5	years (Election required - see instructions)		0.		
d Applied to 2009 distributable amount e Remaining amount distributed out of corpus E Cacces additions carryower applied to 2009 (if an amount appears in column (6), the same amount must be shown in column (6). E Enter the net total of each column as indicated below: a Corpus Add ines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract 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 4 Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instructions e 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(a)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 Excess from 2006 c Excess from 2007 d Excess from 2008 e Excess from 2009 e	c Treated as distributions out of corpus				
e Remaining amount distributed out of corpus 5 Excess distributions carryover applied to 2009 6 Enter the net total of each column as indicated below: 3 , 425, 506. 9 Prior years' undistributed income. Subtract line 4 b from line 2b enter the net out of the from line 2b enter the net out of the from line 2b 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 4 Subtract line 6 from line 6b. Taxable amount - see instructions e Undistributed income for 2008. Subtract line 4 a from line 2a. Taxable amount - see instructions e Undistributed income for 2009. Subtract line 4 a 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) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 4 axess from 2006 6 Excess from 2006 6 Excess from 2007 6 Excess from 2008 6 Excess from 2009	· · · · · · · · · · · · · · · · · · ·	0.			
5 Excess distributions carryover applied to 2009 (fina amount appears in column (a)) 6 Enter the net total of each column as indicated below: 8 Corpus Add lines 31, 42, and 48. Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 2b c Enter the amount of prior years' undistributed mome for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed 4 Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instructions e 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) 8 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2006 c Excess from 2006 c Excess from 2007 d Excess from 2008 c Excess from 2009 2, 762, 261.	· ·		···		346,841.
(if an amount appears in column (d), the same amount must be above in column (a). 6 Enter the net total of each column as indicated below: a Corpus Add lines 31, 4c, and 4e. Subtract line 5. b Prior years' undistributed income. Subtract line 4 b from line 2b. e 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 6b. Taxable amount - see instructions. e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instructions. e 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). 8 Excess distributions carryover from 2004. not applied on line 5 or line 7. 9 Excess distributions carryover from 2004. Subtract lines 7 and 8 from line 6a. 10 Analysis of line 9: a Excess from 2005. b Excess from 2006. c Excess from 2006. c Excess from 2007. d Excess from 2008. c Excess from 2009. c Exc	e Remaining amount distributed out of corpus			,,	
indicated below: 8 Corpus Add Innes 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 2b E 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 instructions e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr. f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distribution and in 2010 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(f) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover from 2004 Not applied on line 5 or line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2005 c Excess from 2006 c Excess from 2007 d Excess from 2008 c Excess from 2009 2, 762, 261.	(If an amount appears in column (d), the same amount	0.			0.
3					
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 instructions e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instructions f Undistributed income for 2008. Subtract line 4a 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) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2005 c Excess from 2006 c Excess from 2007 d Excess from 2008 c Excess from 2008 c Excess from 2008 c Excess from 2009 2, 762, 261.		3,425,506.			
Initial to the form line 2b	· · · · · · · · · · · · · · · · · · ·				
undstributed 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 instructions e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instructions f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) Excess distributions carryover from 2004 not applied on line 5 or line 7 Subtract lines 9 and 8 from line 6a Analysis of line 9: a Excess from 2005 b Excess from 2005 c Excess from 2006 c Excess from 2008 663, 245. e Excess from 2009 2, 762, 261.	-		0.		
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 instructions e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr. 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) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2006 c Excess from 2008 d Excess from 2008 d Excess from 2008 e Excess from 2009 2, 762, 261.					
the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr. 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) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 c Excess from 2008 c Excess from 2008 c Excess from 2009 2, 762, 261.					
assessed d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr. 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) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 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 2, 762, 261.					
amount - see instructions e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr. 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) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 e Excess from 2008 e Excess from 2009 2, 762, 261.			0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr. 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) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 e Excess from 2008 Excess from 2008 c Excess from 2009 2, 762, 261.	d Subtract line 6c from line 6b. Taxable	•	_		
4a from line 2a. Taxable amount - see instr. 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) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 c Excess from 2008 c Excess from 2009 2, 762, 261.			0.		
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) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 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 2, 762, 261.					
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) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008					
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) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 e Excess from 2008 2,762,261.					
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 e Excess from 2008 c Excess from 2009 2,762,261.					
corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 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 2,762,261.				······································	<u></u>
section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 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 2, 762, 261.					
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 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 2,762,261.	• • • • • • • • • • • • • • • • • • • •	0.			
not applied on line 5 or line 7 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 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 2,762,261.					
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 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 2,762,261.		0.			
Subtract lines 7 and 8 from line 6a 3,425,506. 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 2,762,261.				-	
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 2,762,261.		3,425,506.			į
a Excess from 2005 b Excess from 2006 c Excess from 2007 d Excess from 2008 e Excess from 2009 2,762,261.	10 Analysis of line 9:				
c Excess from 2007 d Excess from 2008 e Excess from 2009 2,762,261.	1				
d Excess from 2008 663, 245. e Excess from 2009 2, 762, 261.	b Excess from 2006				
e Excess from 2009 2,762,261.	c Excess from 2007				
Form 990-PF (2009)	e Excess from 2009 2,762,261.	L	L		

DR. HERBERT AND NICOLE WERTHEIM FAMILY Form 990-PF (2009) FOUNDATION. INC 59-1778605 Page 10 Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling b Check box to indicate whether the foundation is a private operating foundation described in section 4942(j)(3) or 4942(1)(5) Tax year Prior 3 years 2 a Enter the lesser of the adjusted net (a) 2009 (b) 2008 (c) 2007 (d) 2006 (e) Total income from Part I or the minimum investment return from Part X for each year listed **b** 85% of line 2a e Qualifying distributions from Part XII, line 4 for each year listed d Amounts included in line 2c not used directly for active conduct of exempt activities e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets (2) Value of assets qualifying under section 4942(j)(3)(B)(i) b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) (3) Largest amount of support from an exempt organization (4) Gross investment income Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see the instructions.) 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).) DR. HERBERT A. WERTHEIM 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 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here \(\sum_{\text{LX}} \) 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 instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

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

c Any submission deadlines;

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

Part XV Supplementary Information (continued) Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient show any relationship to Foundation Purpose of grant or Amount any foundation manager status of contribution Name and address (home or business) or substantial contributor recipient a Paid during the year FAIRCHILD TROPICAL NONE 6,000. PUBLIC EXPLORING, EXPLAINING BOTANIC GARDEN AND CONSERVING 10901 OLD CUTLER RD TROPICAL PLANTS CORAL GABLES, FL 33156 FLORIDA INTERNATIONAL NONE PUBLIC 3,100,000. SCIENTIFIC & UNIVERSITY EDUCATIONAL MODESTO A. MAIDIQUE ADVANCEMENT OF MEDICAL CAMPUS, MARC 540 MIAMI, всно \triangleright 3a 3,106,000. Total **b** Approved for future payment NONE Total **▶** _3b 923611 02-02-10

r gross amounts unless otherwise indicated.	Unrelated	business income		by section 512, 513, or 514	(e)
	(a) Business	(b)	(C) Exclu- sion	(d)	Related or exempt
ogram service revenue;	code	Amount	code	Amount	function income
	_				
		·			
	_				
	_				
	_				
Fees and contracts from government agencies					
embership dues and assessments				·	
terest on savings and temporary cash	i l			4 100	
vestments	ļ -		14	4,122. 71,208.	
ividends and interest from securities			14	71,208.	
et rental income or (loss) from real estate:					
Debt-financed property .					
Not debt-financed property			++		
let rental income or (loss) from personal					
roperty					
Other investment income					
Gain or (loss) from sales of assets other					
han inventory			18	1,866,896.	
let income or (loss) from special events	<u> </u>				
Gross profit or (loss) from sales of inventory		·			
Other revenue:					
a				· · · · · · · · · · · · · · · · · · ·	
b					
C		- -			
d	_				
	t I			1 040 006	
·	— 		A ! !		
Subtotal. Add columns (b), (d), and (e)			0.	1,942,226.	1 042 2
Subtotal. Add columns (b), (d), and (e) Fotal. Add line 12, columns (b), (d), and (e)			0.	1,942,226.	1,942,2
Subtotal. Add columns (b), (d), and (e) Fotal. Add line 12, columns (b), (d), and (e) Worksheet in line 13 instructions to verify calculations				13	1,942,2
Subtotal. Add columns (b), (d), and (e) Fotal. Add line 12, columns (b), (d), and (e) Eworksheet in line 13 instructions to verify calculations				13	1,942,2
Subtotal. Add columns (b), (d), and (e) Fotal. Add line 12, columns (b), (d), and (e) Eworksheet in line 13 instructions to verify calculations Art XVI-B Relationship of Activities	es to the Acco	mplishment of	Exempt	13 Purposes	
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) Worksheet in line 13 instructions to verify calculations That XVI-B Relationship of Activities Explain below how each activity for which	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	
Subtotal. Add columns (b), (d), and (e) Fotal. Add line 12, columns (b), (d), and (e) Eworksheet in line 13 instructions to verify calculations Art XVI-B Relationship of Activities	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) Exercise worksheet in line 13 instructions to verify calculations The Relationship of Activities Explain below how each activity for which	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) Worksheet in line 13 instructions to verify calculations That XVI-B Relationship of Activities Explain below how each activity for which	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) Worksheet in line 13 instructions to verify calculations That XVI-B Relationship of Activities Explain below how each activity for which	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) Worksheet in line 13 instructions to verify calculations That XVI-B Relationship of Activities Explain below how each activity for which	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	
inbtotal. Add columns (b), (d), and (e) fotal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations art XVI-B Relationship of Activitie e No Explain below how each activity for which	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	
ubtotal. Add columns (b), (d), and (e) total. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations art XVI-B Relationship of Activitie e No Explain below how each activity for which	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	
inbtotal. Add columns (b), (d), and (e) fotal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations art XVI-B Relationship of Activitie e No Explain below how each activity for which	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	
ubtotal. Add columns (b), (d), and (e) total. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations art XVI-B Relationship of Activitie e No Explain below how each activity for which	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) Worksheet in line 13 instructions to verify calculations That XVI-B Relationship of Activities Explain below how each activity for which	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) Exercise worksheet in line 13 instructions to verify calculations The Relationship of Activities Explain below how each activity for which	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) Exercise worksheet in line 13 instructions to verify calculations The Relationship of Activities Explain below how each activity for which	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	
Subtotal. Add columns (b), (d), and (e) Fotal. Add line 12, columns (b), (d), and (e) worksheet in line 13 instructions to verify calculations art XVI-B Relationship of Activitie Explain below how each activity for which	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) Exercise worksheet in line 13 instructions to verify calculations The Relationship of Activities Explain below how each activity for which	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) Exercise worksheet in line 13 instructions to verify calculations The Relationship of Activities Explain below how each activity for which	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	
Subtotal. Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) Worksheet in line 13 instructions to verify calculations That XVI-B Relationship of Activities Explain below how each activity for which	es to the Acco	mplishment of	Exempt VI-A contribu	13 Purposes	

	rt XV		NUATION, II		nd Transactions a	and Poletional		<u> 1 100US</u>		ge 13
-	LAV	Exempt Organ		ers io a	no rransactions a	and Relationsi	nips with Non	cnaritable	Ð	
•	Oud the			ho followno	with any other property	an described in secti	on 501(a) of		Yes	No
1		e organization directly or indir					on 50 i(c) oi		163	140
	•	de (other than section 501(c)			- · · · · ·	iizations?		į į		
а		ers from the reporting founda	ation to a noncharitable	exempt org	anization of.			4.74		v
	(1) C							1a(1)		X
		ther assets						<u>1a(2)</u>		_X_
D		transactions:						l		,,
	• •	ales of assets to a noncharital	• =					1b(1)	ļ	X
	• •	urchases of assets from a no	, -	anization				1b(2)	ļ	X
		ental of facilities, equipment,						1b(3)	<u> </u>	X
		eimbursement arrangements						1b(4)	├	X
		oans or loan guarantees						1b(5)	 	X
		erformance of services or me		_				1b(6)		X
		ng of facilities, equipment, ma			•			<u> 1c</u>	L	<u> X</u>
đ		answer to any of the above is							sets,	
		vices given by the reporting f			d less than fair market val	ue in any transaction	or sharing arrangen	ent, show in		
		in (d) the value of the goods,								
(a)	Ine no	(b) Amount involved	(c) Name of no		exempt organization	(d) Description	of transfers, transaction	s, and sharing a	rangeme	ents
	_		 	N/A						
	_									
			<u> </u>							
			ļ			<u> </u>				
			 							
			 							
			ļ							
28	Is the	foundation directly or indirec	ctly affiliated with, or rela	ated to, one	or more tax-exempt organ	izations described				
	ın sed	ction 501(c) of the Code (othe	er than section 501(c)(3)) or in sect	ion 527?			Yes	X	No
t	If "Ye	s," complete the following sch	nedule.							
		(a) Name of or	ganization		(b) Type of organization		(c) Description of rel	ationship		
		N/A			-					
_			·							
			1 1							
_		//		1	//					
					mpanying schedules and state		f my knowledge and bel	ef, it is true, corr	ect,	
	and cor	mplete Declaration of pregnarer (oth	ier than taxpayer of fiduciary	in based on	alfinformation of which prepare	er has any knowledge		/		
		Just,	/] \///n	li/L	louis	CNH	1 LWA!	\mathcal{U}		
e.	S	ignature of officer or trustee	7) ./	*	Date	Title				
Ĭ		Preparer's	7/ 7//					Preparer's identi	fying nur	mber
Sign Here	ું. ≥	signature Min	Year NI			WW Ise	lf- nployed ► □			
S	Paid Preparer's Use Only	Firm's name (or yours PINC	CHASIK YELE	N MIIS	KAT STEIN,	LLC'I	EIN ►			
	o ges	if self-employed), 3225			E, SUITE 50					
	ر ته ا	address and ZIR code	TE 2010	** 4 7740	-, DOLLE JO	•	,,			

Form **990-PF** (2009)

(305)858-5800

d self-employed). 3225 AVIATION AVENUE, SUITE 500 MIAMI, FL 33133

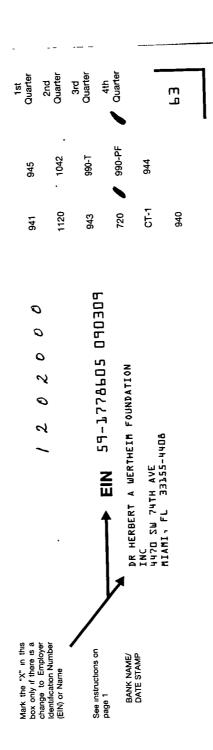
Phone no.

FORM 990-PF INTEREST ON SAV	INGS AND	TEMPORARY	CASH I	NVESTMENTS	STATEMENT	1
SOURCE					AMOUNT	
BLACKSTONE GROUP LP INTEREST					4,1	20.
TOTAL TO FORM 990-PF, PART I	, LINE 3,	COLUMN A			4,1	22.
FORM 990-PF DIVIDEN	IDS AND IN	TEREST FR	OM SECU	RITIES	STATEMENT	2
SOURCE	GR	OSS AMOUN		ITAL GAINS IVIDENDS	COLUMN (A AMOUNT	.)
DIVIDEND INCOME		71,20	18.	0.	71,2	08.
TOTAL TO FM 990-PF, PART I,	LN 4	71,20	18.	0.	71,2	08.
FORM 990-PF		TAXES			STATEMENT	3
DESCRIPTION	(A) EXPENSE PER BOO	S NET	(B) INVEST- INCOME	(C) ADJUSTEI NET INCON		
FOREIGN TAX TAXES & LICENSES EXCISE TAX	13,1	359. 61. .36.	359. 31. 0.			0. 30. 0.
TO FORM 990-PF, PG 1, LN 18	13,5	556.	390.			30.
FORM 990-PF	ОТН	ER EXPENSI	SS		STATEMENT	4
DESCRIPTION	(A) EXPENSI PER BOO	ES NET	(B) INVEST- INCOME	(C) ADJUSTEI NET INCON		
INVESTMENT FEE		70.	70.			0.
CONTRACT LABOR OFFICE		922. 321.	0. 171.			50.

FORM 990-PF	CORPORATE STOCK		STATEMENT 5
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
AT&T		119,347.	68,182.
BFC FINANCIAL		1,314,986.	109,828.
SOUTHERN CO.		15,626.	90,828.
CMS ENERGY CORP.		139,785.	115,436.
NCR CORP		15,574.	30,668.
HEICO CORPORATION		1,955,076.	5,752,277.
GENERAL ELECTRIC		146,246.	81,250.
BALDOR ELECTRIC CO		83,950.	161,600.
E M C CORPORATION MASS		207,455.	162,480.
QWEST COMM INTL INC.		280,999.	156,750.
CARRIER1 INTL S A ADR		1,748.	0.
CHARTER COMMNCATNS INC A		17,842.	0.
MANULIFE FINL CORP		34,000.	59,866.
TELSTRA CORP LTD		23,470.	12,684.
EXELON CORPORATION		11,590.	42,580.
TELLABS INC DEL PV 1CT		53,650.	37,250.
BANKATLANTIC BANCORP		3,745.	80.
CISCO SYSTEMS INC.		24,838.	43,800.
COMCAST CORP		199,755.	134,190.
NEWS CORP CL A		11,250.	13,321.
TYCO INTERNATIONAL		13,897.	18,365.
LEHMAN BROTHERS HOLDINGS INC		25,185.	80.
HEICO CORPORATION NEW		517,600.	1,083,950.
ALCATEL LUCENT SPON ADR		546,338.	35,007.
COVIDIEN LIMITED COM		11,308.	20,095.
LSI CORP		130,260.	19,260.
WILLIAMS COAL SEAM GAS		2,258.	484.
TYCO ELECTRONICS		10,250.	14,610.
TERADATA CORP		17,124.	86,760.
VISA INC		715,008.	742,600.
AMERICAN TOWER CORP		1,973.	24,554.
CIA BRASIL DIST		75,248.	69,020.
DOLLAR GENERAL CORP		63,000.	87,750.
TOTAL TO FORM 990-PF, PART II,	LINE 10B	6,790,381.	9,275,605.

FORM 990-PF 07	THER INVESTMENTS		STATEMENT 6
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
ISRAEL BOND THE BLACKSTONE GROUP	FMV FMV	1,000. 55,228.	1,000. 126,900.
TOTAL TO FORM 990-PF, PART II, L	INE 13	56,228.	127,900.
FORM 990-PF	OTHER ASSETS		STATEMENT 7
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
ARTWORK	65,311. 227,522.	67,311. 231,253.	67,311. 231,253.
TO FORM 990-PF, PART II, LINE 15	292,833.	298,564.	298,564.

FORM 990-	-PF LOA	NS PAYABLE	TO OFF	ICER'S,	DIREC	TOR'S, ETC.	STATEMENT	8
LENDER'S	NAME AND T	ITLE ——						
HERBERT V	WERTHEIM							
DATE OF NOTE	MATURITY DATE	INTEREST RATE	TERMS	OF REP	AYMENT	1		
09/30/03		.00%						
SECURITY	PROVIDED B	Y BORROWER		PURPOS	E OF I	OAN		
NONE DESCRIPTION OF CONSIDERATION			TO MEET MARGIN CALLS					
			FMV OF CONSIDERATION			ORIGINAL LOAN AMOUNT	BALANCE DUE	
NONE					0.	1,700,000.	1,646,4	15
TOTAL TO	FORM 990-P	F, PART II,	LINE	20, COI	UMIN B		1,646,4	15
FORM 990	-PF		OTHER	LIABII	ITIES		STATEMENT	9
DESCRIPT	ION					BOY AMOUNT	EOY AMOUNT	
MARGIN L	OAN PAYABLE	}				1,920,663.	2,027,0	52
TOTAL TO	FORM 990-P	F, PART II,	LINE	22		1,920,663.	2,027,0	52



I

29 3 Telephone number (305) 244 4445

FOR BANK USE IN MICR ENCODING

Federal Tax Deposit Coupon

Federal Tax Deposit Coupon Form 8109 (Rev 12-2006)

Form **8868**

(Rev. April 2009)

Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

File a separate application for each return.

OMB No. 1545-1709

Form 8868 (Rev. 4-2009)

Ifvor			. 0060	
ii you	are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this for		0000	
Do not	complete Part II unless you have already been granted an automatic 3-month extension on a previously file	d Form	0000.	
Part	Automatic 3-Month Extension of Time. Only submit original (no copies needed).			
A corpo	ration required to file Form 990-T and requesting an automatic 6-month extension - check this box and comp	olete		
art I o	n iy			▶ □
	r corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an income tax returns.	extensi	on of time	
noted b (not au you mu	onic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronic tomatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consist submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic films, gov/efile and click on e-file for Charities & Nonprofits.	cally if (1) you want the a	additional
Туре о	Name of Exempt Organization	Emplo	yer identification	n number
print	DR. HERBERT AND NICOLE WERTHEIM FAMILY			
File by th	FOUNDATION, INC.	59	<u>-1778605</u>	
due date filing you	for Number, street, and room or suite no. If a P.O. box, see instructions.			
return. So instruction				
Check	type of return to be filed(file a separate application for each return):			
	Form 990 Form 990-T (corporation) Form 47	720		
=		20		
$\mathbf{I} = \mathbf{I}$	Form 990-BI Form 990-T (sec. 401/a) or 408/a) trust) Form 52	27		
===	Form 990-BL Form 990-T (sec. 401(a) or 408(a) trust) Form 52			
	Form 990-BL	069		
	Form 990-EZ Form 990-T (trust other than above) Form 60	069		
X	Form 990-EZ	069 370		
• The	Form 990-EZ Form 990-T (trust other than above) Form 60 Form 990-PF Form 1041-A Form 88 BPI ACCOUNTING DEPARTMENT 4470 S.W. 74TH AVE., MIAMI, FL - 33155	069 370		
• The	Form 990-EZ	069 370		
• The Tel	Form 990-EZ Form 990-T (trust other than above) Form 60 Form 990-PF Form 1041-A Form 86 BPI ACCOUNTING DEPARTMENT Shooks are in the care of 4470 S.W. 74TH AVE., MIAMI, FL - 33155 Sephone No. 305-264-4465 FAX No. P The organization does not have an office or place of business in the United States, check this box	069 370		
• The Tell	Form 990-EZ Form 990-PF Form 990-T (trust other than above) Form 990-PF Form 1041-A BPI ACCOUNTING DEPARTMENT a books are in the care of 4470 S.W. 74TH AVE., MIAMI, FL - 33155 apphone No. 305-264-4465 FAX No. are organization does not have an office or place of business in the United States, check this box his is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If the	069 370	the whole group	
• The Tell	Form 990-EZ Form 990-T (trust other than above) Form 60 Form 990-PF Form 1041-A Form 86 BPI ACCOUNTING DEPARTMENT Shooks are in the care of 4470 S.W. 74TH AVE., MIAMI, FL - 33155 Sephone No. 305-264-4465 FAX No. P The organization does not have an office or place of business in the United States, check this box	069 370	the whole group	
• The Tell • If the box	Form 990-EZ Form 990-T (trust other than above) Form 60 Form 990-PF Form 1041-A Form 88 Form 990-PF Form 990-PF Form 1041-A Form 990-PF Fo	069 370 is is for membe	the whole group	
• The Tell • If the box	Form 990-EZ Form 990-T (trust other than above) Form 60 Form 990-PF Form 1041-A Form 88 Form 990-PF Form 9	069 370 is is for membe	the whole group ers the extension	
• The Tell • If the box	Form 990-EZ Form 990-T (trust other than above) Form 60 Form 990-PF Form 1041-A Form 88 Form 990-PF Form 9	069 370 is is for membe	the whole group ers the extension	
• The Tell • If the box	Form 990-EZ Form 990-T (trust other than above) Form 60 Form 990-PF Form 1041-A Form 88 Form 990-PF Fo	069 370 is is for membe	the whole group ers the extension	
• The Tell • If the box	Form 990-EZ Form 990-PF Form 1041-A BPI ACCOUNTING DEPARTMENT a books are in the care of \$\int \frac{4470}{4470} \text{S.W.} \textit{74TH AVE., MIAMI, FL.} - \textit{33155} between the organization does not have an office or place of business in the United States, check this box his is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If it is for part of the group, check this box I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time unital MAY 15, 2011 I to file the exempt organization return for the organization named a	069 370 is is for membe	the whole group ers the extension	
• The Tell • If the box	Form 990-EZ Form 990-PF BPI ACCOUNTING DEPARTMENT be books are in the care of \$\int 4470 \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	is is for member	the whole group ers the extension	n will cover.
• The Tell • If the box 1	Form 990-EZ Form 990-PF Form 990-PF Form 1041-A BPI ACCOUNTING DEPARTMENT a books are in the care of \$\int 4470 \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	is is for member	the whole groupers the extension The extension	unting period
• The Tell • If the box 1	Form 990-EZ Form 990-PF BPI ACCOUNTING DEPARTMENT a books are in the care of \(\bigstar \frac{4470 \ S.W. \ 74TH \ AVE., \ MIAMI, \ FL \ - \ 33155}\) be ephone No. \(\bigstar \frac{305-264-4465}{2011} \) The organization does not have an office or place of business in the United States, check this box is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If it is for part of the group, check this box \(\bigstar \text{ and attach a list with the names and EINs of all organization's required to file Form 990-T) extension of time unity is for the organization's return for: \(\bigstar \text{ Calendar year or } \) If this tax year beginning \(\bigcirc \text{ OCT 1, 2009} \), and ending \(\set \text{ EPP 30, 2010} \) If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	is is for member	the whole groupers the extension The extension	unting period
• The Tell • If the box 1	Form 990-EZ Form 990-F Form 990-T (trust other than above) Form 990-F Form 990-PF Form 1041-A Form 88 BPI ACCOUNTING DEPARTMENT a books are in the care of ▶ 4470 S.W. 74TH AVE., MIAMI, FL — 33155 apphone No. ▶ 305-264-4465 FAX No. ▶ the organization does not have an office or place of business in the United States, check this box his is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If the I is for part of the group, check this box ▶ and attach a list with the names and EINs of all the request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time united MAY 15, 2011 Into the exempt organization return for the organization named a set for the organization's return for: ▶ Calendar year or ▶ X tax year beginning OCT 1, 2009 Intitial return Final return If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions. If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated	is is for member till above.	the whole groupers the extension The extension Change in accounts	unting period
• The Tell • If the box 1 1	Form 990-EZ Form 990-T (trust other than above) Form 66 Form 990-PF Form 1041-A Form 88 BPI ACCOUNTING DEPARTMENT a books are in the care of ▶ 4470 S.W. 74TH AVE., MIAMI, FL - 33155 sephone No. ▶ 305-264-4465 FAX No. ▶ the organization does not have an office or place of business in the United States, check this box his is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If the lift is for part of the group, check this box ▶ and attach a list with the names and EINs of all the request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time united the organization's return for: ▶ ANY 15, 2011 The file the exempt organization return for the organization named a storthe organization's return for: ▶ ANY 15, 2011 The file the exempt organization return for the organization named a storthe organization or the org	is is for member	the whole groupers the extension The extension	unting period
• The Tell • If the box 1	Form 990-EZ Form 990-T (trust other than above) Form 66 Form 990-PF Form 1041-A Form 86 BPI ACCOUNTING DEPARTMENT a books are in the care of \(\) 4470 S.W. 74TH AVE., MIAMI, FL - 33155 aphone No. \(\) 305-264-4465 FAX No. \(\) no organization does not have an office or place of business in the United States, check this box his is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If the If it is for part of the group, check this box \(\) and attach a list with the names and EINs of all 1 request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time unity is for the organization's return for: MAY 15, 2011 , to file the exempt organization return for the organization named a second calendar year or Calendar year or and ending SEP 30, 2010 If this tax year beginning OCT 1, 2009 , and ending SEP 30, 2010 If this tax year is for less than 12 months, check reason: Initial return Final return If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions. If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any pnor year overpayment allowed as a credit. Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required,	is is for member till above.	the whole groupers the extension The extension Change in accounts	unting period
• The Tell • If the box 1 1	Form 990-EZ Form 990-T (trust other than above) Form 66 Form 990-PF Form 1041-A Form 88 BPI ACCOUNTING DEPARTMENT a books are in the care of ▶ 4470 S.W. 74TH AVE., MIAMI, FL - 33155 sephone No. ▶ 305-264-4465 FAX No. ▶ the organization does not have an office or place of business in the United States, check this box his is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If the lift is for part of the group, check this box ▶ and attach a list with the names and EINs of all the request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time united the organization's return for: ▶ ANY 15, 2011 The file the exempt organization return for the organization named a storthe organization's return for: ▶ ANY 15, 2011 The file the exempt organization return for the organization named a storthe organization or the org	is is for member till above.	the whole groupers the extension The extension Change in accounts	n will cover.

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

orm 8868 (Rev. 1-2011)					Page 2	
If you are filing for an Additional (Not Automatic) 3-Month I ote. Only complete Part II if you have already been granted a					▶ 🛣	
If you are filing for an Automatic 3-Month Extension, comp		•	01111 00			
Part II Additional (Not Automatic) 3-Month			pies ne	eded).		
Name of exempt organization					ication number	
pe or DR. HERBERT AND NICOLE WER						
foundation, inc.				59-1778605		
Number, street, and room or suite no. If a P.O. box	c, see instruct	ions.				
date for 4470 S.W. 74TH AVE.						
m See City, town or post office, state, and ZIP code. For	a foreign add	ress, see instructions.				
MIAMI, FL 33155						
ter the Return code for the return that this application is for	(file a separa	te application for each return)			0 4	
		T				
plication	Return	Application			Return	
For	Code Is For				Code	
rm 990	01	Form 1041-A			08	
rm 990-BL rm 990-EZ	03	Form 4720				
orm 990-PF	04	Form 5227				
orm 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	10			
orm 990-T (trust other than above)	06	Form 8870			12	
TOP! Do not complete Part II if you were not already gran			sly file	d Form 88		
BPI ACCOUNTIN						
The books are in the care of > 4470 S.W. 745			5			
Telephone No. ➤ 305-264-4465		FAX No. ▶				
If the organization does not have an office or place of busi	— iness in the U				🕨 🔲	
If this is for a Group Return, enter the organization's four of						
ox 🕨 🔲 . If it is for part of the group, check this box 🕨	and att	ach a list with the names and EINs of all	memb	ers the ext	ension is for.	
I request an additional 3-month extension of time until						
5 For calendar year, or other tax year beginning			SEP	30,	2011	
If the tax year entered in line 5 is for less than 12 month	hs, check rea	son: Initial return	Final r	eturn		
Change in accounting period						
7 State in detail why you need the extension						
	LE A CC	MPLETE AND ACCURATE	RET	URN H	AS NOT	
YET BEEN RECEIVED.						
2. If the configuration in factors 2000 PL 2000 PE 2000 T. 47	700 6060					
8a If this application is for Form 990-BL, 990-PF, 990-T, 47	720, 01 000 9 ,	enter the tentative tax, less any			0	
nonrefundable credits. See instructions. b If this application is for Form 990-PF, 990-T, 4720, or 6	ne setne 220	hatemites has athere aldeburger w	8a	\$		
b If this application is for Form 990-PF, 990-1, 4720, or 6 tax payments made. Include any prior year overpayments		=	-			
previously with Form 8868.	anowed as	a credit and any amount paid	8b	s	6,568	
c Balance due. Subtract line 8b from line 8a. Include yo	ur navment v	with this form if required by using	00	3	0,300	
EFTPS (Electronic Federal Tax Payment System). See		and this form, it required, by using	8c	s	0	
		and Verification	1 30	1 9		
Under penalties of perjury Declare that I have examined this form,	_		he hest o	if my knowle	edge and belief	
t is true, correct, and complete, and they I am authorized to prepare	this form.				/	
t is true, correct, and complete, and tright are defined to propare						
Signature > Man mill	^	. D	Date	· 5/	الكلا	