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# Return of Private Foundation

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

### Treated as a Private Foundation

2009

Department of the Treasury  
Internal Revenue Service

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

For calendar year 2009, or tax year beginning DEC 1, 2009, and ending NOV 30, 2010

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

Use the IRS label. Otherwise, print or type See Specific Instructions.	Name of foundation <b>THE SELANDER FOUNDATION</b>		A Employer identification number <b>20-2024998</b>
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite <b>38 CEDARWOOD DRIVE</b>		B Telephone number <b>203-625-3179</b>
	City or town, state, and ZIP code <b>GREENWICH, CT 06830</b>		C If exemption application is pending, check here <input type="checkbox"/>
			D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ <b>5,887,501.</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 <input type="checkbox"/>
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received	195,000.		N/A	
2	Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	196,648.	196,648.		STATEMENT 1
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	1,145,954.			
b	Gross sales price for all assets on line 6a	2,846,603.			
7	Capital gain net income (from Part IV, line 2)		1,145,954.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss)				
11	Other income	184.	0.		STATEMENT 2
12	Total. Add lines 1 through 11	1,537,786.	1,342,602.		
13	Compensation of officers, directors, trustees, etc.	0.	0.		0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees				
b	Accounting fees STMT 3	4,250.	0.		0.
c	Other professional fees				
17	Interest				
18	Taxes STMT 4	11,544.	544.		0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses STMT 5	4,010.	4,000.		0.
24	Total operating and administrative expenses. Add lines 13 through 23	19,804.	4,544.		0.
25	Contributions, gifts, grants paid	166,300.			166,300.
26	Total expenses and disbursements. Add lines 24 and 25	186,104.	4,544.		166,300.
27	Subtract line 26 from line 12	1,351,682.			
a	Excess of revenue over expenses and disbursements		1,338,058.		
b	Net investment income (if negative, enter -0-)				
c	Adjusted net income (if negative, enter -0-)			N/A	

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Operating and Administrative Expenses

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GREENWICH, CT

ODDEN, UT

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**Part II Balance Sheets**

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing	70,058.	82.	82.
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 6	161,361.	119,727.	155,318.
	c Investments - corporate bonds			
<b>Liabilities</b>	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 7	3,644,977.	5,108,269.	5,732,101.
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	3,876,396.	5,228,078.	5,887,501.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
<b>Net Assets or Fund Balances</b>	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	3,876,396.	5,228,078.	
30 Total net assets or fund balances	3,876,396.	5,228,078.		
31 Total liabilities and net assets/fund balances	3,876,396.	5,228,078.		

**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	3,876,396.
2 Enter amount from Part I, line 27a	2	1,351,682.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	5,228,078.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	5,228,078.

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

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SEE ATTACHED STATEMENT D-1	P	VARIOUS	VARIOUS
b CAPITAL GAINS DIVIDENDS			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 2,843,189.		1,700,649.	1,142,540.
b 3,414.			3,414.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(l) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			1,142,540.
b			3,414.
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	1,145,954.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	{ If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8 }	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	124,390.	3,338,422.	.037260
2007	62,818.	2,630,100.	.023884
2006	21,750.	841,804.	.025837
2005	12,324.	521,604.	.023627
2004	4,500.	449,395.	.010013

2 Total of line 1, column (d)	2	.120621
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	.024124
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	5,332,781.
5 Multiply line 4 by line 3	5	128,648.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	13,381.
7 Add lines 5 and 6	7	142,029.
8 Enter qualifying distributions from Part XII, line 4	8	166,300.

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 instructions)**

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		1	13,381.
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		2	0.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		3	13,381.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
3 Add lines 1 and 2		5	13,381.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		6a	14,308.
5 Tax based on investment income Subtract line 4 from line 3 If zero or less, enter -0-		6b	
6 Credits/Payments		6c	
a 2009 estimated tax payments and 2008 overpayment credited to 2009		6d	
b Exempt foreign organizations - tax withheld at source		7	14,308.
c Tax paid with application for extension of time to file (Form 8868)		8	7.
d Backup withholding erroneously withheld		9	
7 Total credits and payments Add lines 6a through 6d		10	920.
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached		11	0.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be Credited to 2010 estimated tax <input checked="" type="checkbox"/> 920. Refunded <input checked="" type="checkbox"/>			

**Part VII-A Statements Regarding Activities**

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

N/A

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ ROBERT W. SELANDER Telephone no ▶ 203-625-3179  
 Located at ▶ 38 CEDARWOOD DRIVE, GREENWICH, CT ZIP+4 ▶ 06830

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ▶ ☐  
 and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

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

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

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

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

If "Yes" to 6b, file Form 8870.

X

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

☐ Yes ☒ No

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

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 9		0.	0.	0.

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

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

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

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	5,390,323.
b	Average of monthly cash balances	1b	23,668.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	5,413,991.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	5,413,991.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	81,210.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,332,781.
6	Minimum investment return. Enter 5% of line 5	6	266,639.

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

1	Minimum investment return from Part X, line 6	1	266,639.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	13,381.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	13,381.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	253,258.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	253,258.
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	253,258.

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	166,300.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	166,300.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	13,381.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	152,919.

**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.

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

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
<b>1</b> Distributable amount for 2009 from Part XI, line 7				253,258.
<b>2</b> Undistributed income, if any, as of the end of 2009				
<b>a</b> Enter amount for 2008 only			96,642.	
<b>b</b> Total for prior years		0.		
<b>3</b> Excess distributions carryover, if any, to 2009				
<b>a</b> From 2004				
<b>b</b> From 2005				
<b>c</b> From 2006				
<b>d</b> From 2007				
<b>e</b> From 2008				
<b>f</b> Total of lines 3a through e	0.			
<b>4</b> Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 166,300.				
<b>a</b> Applied to 2008, but not more than line 2a			96,642.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2009 distributable amount				69,658.
<b>e</b> Remaining amount distributed out of corpus	0.			
<b>5</b> Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
<b>d</b> Subtract line 6c from line 6b Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr			0.	
<b>f</b> Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				183,600.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
<b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
<b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2005				
<b>b</b> Excess from 2006				
<b>c</b> Excess from 2007				
<b>d</b> Excess from 2008				
<b>e</b> Excess from 2009				

**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(j)(5)

## 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)				
<b>a</b> <i>Paid during the year</i>				
SEE STATEMENT 10				
<b>Total</b>			▶ 3a	166,300.
<b>b</b> <i>Approved for future payment</i>				
NONE				
<b>Total</b>			▶ 3b	0





**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

Employer identification number

THE SELANDER FOUNDATION

20-2024998

Organization type (check one).

Filers 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).

LHA 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

Employer identification number

THE SELANDER FOUNDATION

20-2024998

**Part I Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	ROBERT W. SELANDER 38 CEDARWOOD DRIVE GREENWICH, CT 06830	\$ 195,000.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)



Name of organization

Employer identification number

THE SELANDER FOUNDATION

20-2024998

**Part II    Noncash Property** (see instructions)[illegible]

# Realized Gains and Losses

Foundation Selandier  
38 Cedarwood Dr  
Greenwich, CT 06830

## Realized Gains and Losses

Description	Date Acquired	Date Sold	Quantity	Net Proceeds	Cost	Short Term Gains	Total Long Gains	Total Gains
TCW Inc Tot Ret Bd Fd	02/18/2009	01/22/2010	27,082.990	272,982	250,000	22,982		22,982
TCW Inc Tot Ret Bd Fd	02/27/2009	01/22/2010	186.010	1,875	1,693	182		182
TCW Inc Tot Ret Bd Fd	03/31/2009	01/22/2010	239.202	2,411	2,182	230		230
TCW Inc Tot Ret Bd Fd	04/30/2009	01/22/2010	238.683	2,406	2,201	205		205
TCW Inc Tot Ret Bd Fd	05/29/2009	01/22/2010	226.833	2,286	2,150	136		136
TCW Inc Tot Ret Bd Fd	06/30/2009	01/22/2010	227.727	2,295	2,168	127		127
TCW Inc Tot Ret Bd Fd	06/30/2009	01/22/2010	3,148.739	31,738	30,000	1,738		1,738
TCW Inc Tot Ret Bd Fd	07/31/2009	01/22/2010	231.928	2,338	2,273	65		65
TCW Inc Tot Ret Bd Fd	08/20/2009	01/22/2010	9,997.600	100,770	100,000	770		770
TCW Inc Tot Ret Bd Fd	08/31/2009	01/22/2010	302.360	3,048	3,015	33		33
TCW Inc Tot Ret Bd Fd	09/30/2009	01/22/2010	301.235	3,036	3,036	0		0
TCW Inc Tot Ret Bd Fd	11/02/2009	01/22/2010	279.154	2,814	2,847	(34)		(34)
TCW Inc Tot Ret Bd Fd	11/30/2009	01/22/2010	279.904	2,821	2,866	(45)		(45)
TCW Inc Tot Ret Bd Fd	12/30/2009	01/22/2010	606.915	6,117	6,027	91		91
			43,349.280	436,937	410,457	26,479		26,479
Harding Loevner Emrg Mkt	02/18/2009	02/03/2010	1,620.469	67,557	38,000	29,557		29,557
Harding Loevner Emrg Mkt	12/18/2009	02/03/2010	4.912	205	205	0		0
			1,625.381	67,762	38,205	29,557		29,557
Mastercard Incorporated	05/31/2006	02/12/2010	3,600.000	812,362	140,400		671,962	671,962
Mastercard Incorporated	05/31/2006	02/12/2010	1,400.000	315,906	54,600		261,306	261,306
PIMCo Total Return Fd Inst	02/18/2009	02/17/2010	4,578.755	49,976	46,570	3,406		3,406
PIMCo Total Return Fd Inst	02/18/2009	05/20/2010	19,748.654	219,976	200,860		19,116	19,116
Thornburg Value Fund	12/30/2008	05/20/2010	2,058.652	61,983	44,830		17,153	17,153
Thornburg Value Fund	03/26/2009	05/20/2010	20.112	606	418		187	187
Thornburg Value Fund	06/26/2009	05/20/2010	15.850	477	413	64		64
Thornburg Value Fund	09/25/2009	05/20/2010	17.690	533	529	3		3
Thornburg Value Fund	12/24/2009	05/20/2010	9.731	293	310	(17)		(17)
Thornburg Value Fund	03/26/2010	05/20/2010	3.115	94	102	(9)		(9)
			2,125.150	63,986	46,603	42	17,341	17,383

## STATEMENT D-1

## Realized Gains and Losses

Foundation Selderer

## Realized Gains and Losses

Description	Date Acquired	Date Sold	Quantity	Net Proceeds	Cost	Short Term Gains	Total Long Gains	Total Gains
Vanguard Energy ETF Par 0.00	10/22/2008	05/20/2010	518,000	40,156	33,974	6,182	6,182	6,182
Buffalo Small Cap Fund	06/18/2008	07/07/2010	10,560	232	223	9	9	9
Buffalo Small Cap Fund	02/18/2009	07/07/2010	1,614,987	35,416	25,000	10,416	10,416	10,416
Buffalo Small Cap Fund	12/18/2009	07/07/2010	1,983	43	44	0	0	0
Buffalo Small Cap Fund	02/12/2010	07/07/2010	1,120,072	24,563	25,000	(437)	(437)	(437)
			2,747,602	60,254	50,266	(437)	10,425	9,988
Cullen High Dividend	06/30/2009	07/07/2010	5,205,833	55,742	50,000	5,742	5,742	5,742
Cullen High Dividend	07/31/2009	07/07/2010	10,845	116	110	6	6	6
Cullen High Dividend	08/31/2009	07/07/2010	15,913	170	166	4	4	4
Cullen High Dividend	09/30/2009	07/07/2010	12,231	131	130	1	1	1
Cullen High Dividend	10/30/2009	07/07/2010	6,054	65	65	(1)	(1)	(1)
Cullen High Dividend	11/30/2009	07/07/2010	17,288	185	191	(5)	(5)	(5)
Cullen High Dividend	12/31/2009	07/07/2010	12,577	135	141	(6)	(6)	(6)
Cullen High Dividend	01/29/2010	07/07/2010	4,453	48	49	(1)	(1)	(1)
Cullen High Dividend	02/12/2010	07/07/2010	4,653,259	49,825	50,000	(175)	(175)	(175)
Cullen High Dividend	02/26/2010	07/07/2010	25,231	270	276	(6)	(6)	(6)
Cullen High Dividend	03/31/2010	07/07/2010	27,978	300	321	(22)	(22)	(22)
Cullen High Dividend	04/30/2010	07/07/2010	14,804	159	170	(11)	(11)	(11)
Cullen High Dividend	06/01/2010	07/07/2010	27,601	296	293	2	2	2
Cullen High Dividend	06/30/2010	07/07/2010	34,320	367	361	6	6	6
			10,068,387	107,808	102,273	(206)	5,742	5,536
DFA Emerging Markets	02/03/2010	07/07/2010	1,397,429	24,976	24,701	275	275	275
DFA Intl Small Co Port	02/18/2009	07/07/2010	1,814,224	24,976	16,318	8,658	8,658	8,658
DFA US Lge Co Inst	12/30/2008	07/07/2010	2,986,858	24,976	20,919	4,057	4,057	4,057
Ishares Tr Russell Val 2000 Par 0.00	10/23/2008	07/07/2010	0.802	45	39	5	5	5
Ishares Tr Russell Val 2000 Par 0.00	10/23/2008	07/07/2010	894,198	49,689	43,840	5,849	5,849	5,849
Ishares Tr Russell Val 2000 Par 0.00	12/31/2008	07/07/2010	12,701	706	614	92	92	92
Ishares Tr Russell Val 2000 Par 0.00	03/30/2009	07/07/2010	7,782	432	303	129	129	129

STATEMENT D-I

## Realized Gains and Losses

Foundation Selander

## Realized Gains and Losses

Description	Date Acquired	Date Sold	Quantity	Net Proceeds	Cost	Short Term Gains	Total Long Gains	Total Gains
Ishares Tr Russell Val 2000 Par 0.00	07/09/2009	07/07/2010	8.240	458	360	98		98
Ishares Tr Russell Val 2000 Par 0.00	09/28/2009	07/07/2010	4.731	263	272	(9)		(9)
Ishares Tr Russell Val 2000 Par 0.00	12/30/2009	07/07/2010	5.918	329	350	(21)		(21)
Ishares Tr Russell Val 2000 Par 0.00	03/31/2010	07/07/2010	2.430	135	156	(21)		(21)
			936.000	52,012	45,896	46	6,069	6,116
Vanguard Energy ETF Par 0.00	10/22/2008	07/07/2010	82.000	6,094	5,378		716	716
Vanguard Energy ETF Par 0.00	10/22/2008	07/07/2010	325.000	24,152	21,313		2,839	2,839
			407.000	30,246	26,692		3,554	3,554
PIMCo Foreign Bond Unhld I	10/23/2008	10/07/2010	12,448.288	141,762	114,794		26,968	26,968
PIMCo Total Return Fd Inst	02/18/2009	10/07/2010	5,168.756	60,418	52,570	7,848		7,848
PIMCo Total Return Fd Inst	02/27/2009	10/07/2010	61.454	718	615	103		103
PIMCo Total Return Fd Inst	03/31/2009	10/07/2010	154.812	1,810	1,568	241		241
PIMCo Total Return Fd Inst	04/30/2009	10/07/2010	153.679	1,796	1,571	226		226
PIMCo Total Return Fd Inst	05/29/2009	10/07/2010	149.899	1,752	1,563	189		189
PIMCo Total Return Fd Inst	06/30/2009	10/07/2010	149.321	1,745	1,560	185		185
PIMCo Total Return Fd Inst	07/31/2009	10/07/2010	154.877	1,810	1,646	164		164
PIMCo Total Return Fd Inst	08/20/2009	10/07/2010	21,303.780	249,022	228,602	20,420		20,420
			27,296.578	319,073	289,697	29,376		29,376
Loomis Sayles Bond Fund	02/10/2009	11/29/2010	3,533.569	50,000	37,385		12,615	12,615
Short Term Gains				658,905	599,742	59,163		
Total Long Gains				2,184,284	1,100,907		1,083,377	
Total (Sales)				2,843,189	1,700,649	59,163	1,083,377	1,142,540
Total Gains						59,163	1,083,377	1,142,540

STATEMENT D-1

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FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
TD AMERITRADE	200,062.	3,414.	196,648.
TOTAL TO FM 990-PF, PART I, LN 4	200,062.	3,414.	196,648.

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FORM 990-PF	OTHER INCOME	STATEMENT	2
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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
NON-DIVIDEND DISTRIBUTION	184.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	184.	0.	

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FORM 990-PF	ACCOUNTING FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	4,250.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	4,250.	0.		0.

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FORM 990-PF	TAXES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAXES	11,000.	0.		0.
FOREIGN TAXES	544.	544.		0.
TO FORM 990-PF, PG 1, LN 18	11,544.	544.		0.

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FORM 990-PF	OTHER EXPENSES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT ADVISORY FEES	4,000.	4,000.		0.
BANK SERVICE CHARGES	10.	0.		0.
TO FORM 990-PF, PG 1, LN 23	4,010.	4,000.		0.

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FORM 990-PF	CORPORATE STOCK	STATEMENT	6
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT 11	119,727.	155,318.
TOTAL TO FORM 990-PF, PART II, LINE 10B	119,727.	155,318.

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FORM 990-PF	OTHER INVESTMENTS	STATEMENT	7
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT 12	COST	5,108,269.	5,732,101.
TOTAL TO FORM 990-PF, PART II, LINE 13		5,108,269.	5,732,101.

FORM 990-PF

LIST OF SUBSTANTIAL CONTRIBUTORS  
PART VII-A, LINE 10

STATEMENT 8

NAME OF CONTRIBUTOR

ADDRESS

ROBERT W. SELANDER

38 CEDARWOOD DRIVE  
GREENWICH, CT 06830

FORM 990-PF

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

STATEMENT 9

NAME AND ADDRESS

TITLE AND  
AVRG HRS/WKCOMPEN-  
SATIONEMPLOYEE  
BEN PLAN EXPENSE  
CONTRIB ACCOUNTROBERT W. SELANDER  
38 CEDARWOOD DRIVE  
GREENWICH, CT 06830

CHAIRMAN &amp; PRESIDENT/AS REQ'D

0. 0. 0.

NANCY CROSS SELANDER  
38 CEDARWOOD DRIVE  
GREENWICH, CT 06830

1ST VP, SEC &amp; TREASURER/AS REQ'D

0. 0. 0.

CROSBY SELANDER  
38 CEDARWOOD DRIVE  
GREENWICH, CT 06830

TRUSTEE/AS REQ'D

0. 0. 0.

RUSSELL SELANDER  
38 CEDARWOOD DRIVE  
GREENWICH, CT 06830

TRUSTEE/AS REQ'D

0. 0. 0.

TRACEY KAY LUNDGREN  
38 CEDARWOOD DRIVE  
GREENWICH, CT 06830

TRUSTEE/AS REQ'D

0. 0. 0.

JESSICA ANNE LUNDGREN  
38 CEDARWOOD DRIVE  
GREENWICH, CT 06830

TRUSTEE/AS REQ'D

0. 0. 0.

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII

0. 0. 0.

FORM 990-PF

GRANTS AND CONTRIBUTIONS  
PAID DURING THE YEAR

STATEMENT 10

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
BLYTHEDALE CHILDREN'S HOSPITAL 95 BRADHURST AVENUE VALHALLA, NY 10565	HEALTH PURPOSES	PUBLIC CHARITY	500.
BOYS AND GIRLS CLUB OF GREENWICH 4 HORSENECK LANE GREENWICH, CT 06830	SOCIAL ASSISTANCE	PUBLIC CHARITY	5,000.
COMMUNITY HEALTH CENTER OF CAPE COD 107 COMMERCIAL STREET MASHPEE, MA 02649	HEALTH PURPOSES	PUBLIC CHARITY	1,000.
GREENWICH ADULT DAY CARE 125 RIVER ROAD EXTENSION COS COB, CT 06807	HEALTH PURPOSES	PUBLIC CHARITY	1,000.
MEALS ON WHEELS ASSOCIATION OF AMERICA 89 MAPLE AVENUE GREENWICH, CT 06830	SOCIAL ASSISTANCE	PUBLIC CHARITY	500.
MEMORIAL SLOAN KETTERING CANCER CENTER 1275 YORK AVENUE NEW YORK, NY 10065	HEALTH PURPOSES	PUBLIC CHARITY	1,000.
NATHANIEL WITHERELL REHABILITATION AND NURSING CENTER - 70 PARSONAGE ROAD GREENWICH, CT 06830	HEALTH PURPOSES	PUBLIC CHARITY	1,500.
NYU UROLOGY RESEARCH PROGRAMS 150 EAST 32ND STREET, 2ND FLOOR NEW YORK, NY 10016	HEALTH PURPOSES	PUBLIC CHARITY	150,000.



THE SELANDER FOUNDATION

20-2024998

THE GREENWICH LAND TRUST 132 EAST PUTNAM AVE COS COB, CT 06807	SOCIAL ASSISTANCE	PUBLIC CHARITY	1,000.
UNITED WAY OF GREENWICH 1 LAFAYETTE COURT GREENWICH, CT 06830	SOCIAL ASSISTANCE	PUBLIC CHARITY	2,000.
WORLD AFFAIRS FORUM INC. 30 OAK ST, SUITE 105 STAMFORD, CT 06905	SOCIAL ASSISTANCE	PUBLIC CHARITY	300.
THE FRESH AIR FUND 633 3RD AVENUE, 14TH FLOOR NEW YORK, NY 10017	SOCIAL ASSISTANCE	PUBLIC CHARITY	500.
THE UNIVERSITY OF TEXAS SOUTHWESTERN MEDICAL CENTER 5323 HARRY HINES BLVD. DALLAS, TX 75390	HEALTH PURPOSES	PUBLIC CHARITY	1,000.
WOUNDED WARRIOR PROJECT 7020 AC SKINNER PKWY, SUITE 100 JACKSONVILLE, FL 32256	SOCIAL ASSISTANCE	PUBLIC CHARITY	1,000.

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

166,300.

## FORM 990-PF

## INVESTMENTS - CORPORATE STOCK

## STATEMENT 11

# Shares	Description	Beginning of Year	End of Year	
		(a) Book Value	(b) Book Value	Fair Market (c) Value
2,862.480	Ishares TR Msci EAFE Fd	115,932	119,727	155,318
-	Ishares Tr Russell Val 2000	45,429	-	-
		161,361	119,727	155,318

## FORM 990-PF

## OTHER INVESTMENTS

## STATEMENT 12

		Beginning of Year	End of Year	
# Shares	Description	(a) Book Value	(b) Book Value	Fair Market (c) Value
MUTUAL FUNDS:				
11,361.157	AQR Managed Futures	\$ -	\$ 110,000	114,407
3,903.237	DFA Emerging Markets	\$ -	\$ 68,316	80,953
5,769.683	DFA Intl Small Cap Val	\$ 51,072	\$ 61,505	90,526
34,492.893	DFA US Large Co.	\$ 175,499	\$ 260,294	322,164
11,495.476	DFA US Small Cap	\$ 134,560	\$ 136,001	228,300
45,414.488	Doubleline Total Return	\$ -	\$ 490,398	505,009
17,289.885	Gold Sachs Tr Comm Str Fd	\$ 35,279	\$ 89,167	103,048
36,780.593	GS Local Emerg Debt	\$ 183,019	\$ 337,126	348,312
16,740.944	Hussman Strategic Growth	\$ -	\$ 220,000	217,800
13,712.493	Loomis Sayles Bond Fund	\$ 172,759	\$ 148,773	193,483
59,526.231	Metropolitan West Total	\$ -	\$ 603,175	633,954
18,736.553	PIMCo Commodity Real Ret	\$ 107,396	\$ 123,660	162,071
10,221.664	Pimco Developing Local	\$ 100,150	\$ 102,179	105,794
53,831.941	Pimco Foreign Bond Unhd I	\$ 499,676	\$ 500,730	579,770
14,965.955	PIMCo Low Duration Fd Inst	\$ -	\$ 160,157	158,789
61,877.428	Pimco Real Return Bond Fd	\$ 459,726	\$ 630,731	717,159
65,899.282	PIMCo Total Return Fd Inst	\$ 765,416	\$ 717,487	757,183
1,551.760	DJ Wilshire REIT ETF	\$ 58,478	\$ 61,136	91,243
2,408.865	iShares Lehman Aggregated Bond	\$ 227,898	\$ 236,661	258,640
685.840	Vanguard Energy ETF	\$ 109,544	\$ 50,773	63,496
-	Buffalo Small Cap Fund	\$ 25,223	\$ -	-
-	Harding Loevner Emrg	\$ 38,000	\$ -	-
-	Thornburg Value Fund	\$ 46,191	\$ -	-
-	Cullen High Dividend	\$ 50,661	\$ -	-
-	TCW Inc Oto Ret Bd Fd	\$ 404,431	\$ -	-
TOTAL MUTUAL FUNDS:		3,644,977	5,108,269	5,732,101