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Form 990-PF Department of the Treasury internal Revenue Service

Return of Private Foundation

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

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

2009

OMB No 1545-0052

For	calen	dar year 2009, or tax year beginning DEC	1, 2009	, and ending	NOV 30, 2010)
		all that apply Initial return		ormer public charity	Final retur	
_ `		X Amended return	Address change		Name change	''
		Name of foundation	7.00.000 chan	~	A Employer Identificatio	n aumhor
	e the	מס עמשתחתנדט ז עשתראבות כח	AND THELMA		A Employer wendingano	
	label.		AND THEHMA	11	20-3889201	1
Uti	erwi:			15		<u> </u>
	print r type		•	Room/suite	B Telephone number	
	Spe	elfie	S PL		(402)571-7	/201
	ructio	one City of town, state, and ZIP code			C If exemption application is	pending, check here
		OMAHA, NE 00132-2009			D 1. Foreign organization	s, check here
H (Check	type of organization X Section 501(c)(3) ex	empt private foundation		Foreign organizations m check here and attach c	eeting the 85% test,
	ີ Se		Other taxable private founda	ation		
l F		arket value of all assets at end of year J Accounting		Accrual	E If private foundation sta under section 507(b)(1	
		· I —	her (specify)		, ,,	<i>' ' ' ' ' ' ' ' ' '</i>
	- \$	408,871. (Part I, colui		hasis)	F If the foundation is in a	
<u> </u>	art i	,			under section 507(b)(1	4.0
	21 C E	(I se total of amounts in columns (b), (c), and (d) may not	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(0) Disbursements for charitable purposes
		necessanly equal the amounts in column (a))				(cash basis only)
	1	Contributions, gifts, grants, etc., received	62,408.		N/A	
	2	Check X if the foundation is not required to attach Sch. B	1111			
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	12,011.	12,011.		STATEMENT 1
	5a	Gross rents		·		The state of the s
	Ι.	Net rental income or (loss)				
	۱ ـ		10,557.	' <i></i>	· · · · · · · · · · · · · · · · · · ·	
ě	Ua	Net gain or (loss) from sale of assets not on line 10 Gross sales price for all 32,086.	10,557.	***************************************		-
Revenue	b	assets on line 6a 32,000.	' ' '	10 557	ı banı anan madal	
ڇَ	7	Capital gain net income (from Part IV, line 2)		10,557.		
_	8	Net short-term capital gain	·	'		
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	Ι.	Less Cost of goods sold				
	C	Gross profit or (loss)				
	11	Other income		· · · · · · · · · · · · · · · · · · ·		
	12	Total. Add lines 1 through 11	84,976.	22,568.		
	13	Compensation of officers, directors, trustees etc	0.	0.		0.
	14	Other employee salaries and wages	- 0.			
	1	15.7	_ -		· · · · · · · · · · · · · · · · · · ·	
Š	15	Pension plans, employee benefits				
JSes		Legal fees OGDEN, UT				
ē	b	Accounting fees STMT 2	735.	0.	<u></u> .	0.
Ä	C	Other professional fees				
Operating and Administrative Exper	17	Interest				
rat	18	Taxes STMT 3	184.	0.		0.
is:	19	Depreciation and depletion				
Ę	20	Occupancy				
Ą	21	Travel, conferences, and meetings	731.	0.		0.
ğ	22	Printing and publications	, , , , , , , , , , , , , , , , , , , ,			
ā	22		150.	0.		
, S	23	•	150.	<u>U.</u>		0.
rat	24	Total operating and administrative		_		
De		expenses. Add lines 13 through 23	1,800.	0.		0.
J	25	Contributions, gifts, grants paid	16,000.			16,000.
	26	Total expenses and disbursements.				
		Add lines 24 and 25	17,800.	0.		16,000.
	27					
		Excess of revenue over expenses and disbursements	67,176.			
		Net investment income (if negative, enter -0-)	0171100	22,568.	, , , , , , , , , , , , , , , , , , , 	
		Adjusted net income (if negative, enter -0-)		22,300.	N/A	-
	1 6	MULLINER RECORDER Of negative enter (%)	1		IN/A	I .

Form 990-PF (2009)

SLATTERY FOUNDATION

20-3889201

p.	***	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of	year
	***	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
`		Cash - non-interest-bearing	10.766	14.060	
		Savings and temporary cash investments	13,766.	14,960.	14,960.
	3	Accounts receivable		1	
i		Less allowance for doubtful accounts			
ļ	4	Pledges receivable			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons			
l	7	Other notes and loans receivable			
ļ		Less allowance for doubtful accounts			
ets	8	Inventories for sale or use			
SS	9	Prepaid expenses and deferred charges			
٦	10a	Investments - U S and state government obligations			
	b	Investments - corporate stock STMT 6	235,892.	301,874.	393,911.
	C	Investments - corporate bonds			
Net Assets or Fund Balances	11	Investments - land, buildings, and equipment basis			
		Less. accumulated depreciation			
	Investments - mortgage loans				
	13	Investments - other			
Total I Total	Land, buildings, and equipment basis				
		Less. accumulated depreciation			·
	15	Other assets (describe)			
\perp	16	Total assets (to be completed by all filers)	249,658.	316,834.	408,871.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
ij	20	Loans from officers, directors, trustees, and other disqualified persons			
iab	21	Mortgages and other notes payable			
_	22	Other liabilities (describe)			
			_		
	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here			
s		and complete lines 24 through 26 and lines 30 and 31.		·	
Ç	24	Unrestricted			
lar	25	Temporarily restricted			
18	26	Permanently restricted			
Š		Foundations that do not follow SFAS 117, check here			
ī		and complete lines 27 through 31.		_	
ts c	27	Capital stock, trust principal, or current funds	0.	0.	
sse	28	Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
t A	29	Retained earnings, accumulated income, endowment, or other funds	249,658.	316,834.	
Ne	30	Total net assets or fund balances	249,658.	316,834.	
	31	Total liabilities and net assets/fund balances	249,658.	316,834.	******
P	ari	Analysis of Changes in Net Assets or Fund B	alances		
_					
		I net assets or fund balances at beginning of year - Part II, column (a), line	30		
		st agree with end-of-year figure reported on prior year's return)		1	249,658.
		r amount from Part I, line 27a		2	67,176.
		r increases not included in line 2 (itemize)			0.
		lines 1, 2, and 3		4	316,834.
		eases not included in line 2 (itemize)		5	0.
6	Tota	I net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	olumn (b), line 30	6	316,834.
					Form 990-PF (2009)

P	art IV Capital Gains	and Losses for Tax on Ir	nvestment	Income						
_					P	low acquir - Purchase - Donation	١ ، ١) Date acomo , day		(d) Date sold (mo , day, yr)
<u>1a</u>	(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.) SEE ATTACHED STATEMENT (e) Gross sales price (f) Depreciation allowed (g) Cost or other bas plus expense of sale (or allowable) 32,086. 21, Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (i) FM V as of 12/31/69 (j) Adjusted basis (k) Excess of col. (i over col. (j)), if any over col. (j), if any as of 12/31/69 (ii) FM V as of 12/31/69 (if gain, also enter in Part I, line 7 if (loss), enter -0- in Part I, line 7 if (loss), enter -0- in Part I, line 8, column (c) if (loss), enter -0- in Part I, line 8				<u> </u>					
<u>_p</u>	(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.) SEE ATTACHED STATEMENT (e) Gross sales price (f) Depreciation allowed (or allowable) (g) Cost or other basis plus expense of sale (or allowable) (ii) FMV as of 12/31/69 (iii) FMV as of 12/31/69 (iv) FMV									
<u> </u>										
_ <u>d</u> _e					├			_	.	
									or (loss) f) minus (
							_			
b										
_d										
<u>e</u>			<u> </u>		9.			_		10,557.
_	Complete only for assets showing		1						(h) gain	
	(i) F M V as of 12/31/69						COI (K	osses (fr	t less thar rom col (l	h))
<u>a</u>			-							
<u>b</u>			 			 				
			 							··-
_ <u>d</u> e			 						<u>.</u>	10,557.
		C 16	n en Dont I leas		\neg		_			10/337.
	Capital gain net income or (net capital loss) {\text{ if (loss), enter -0- in Part I, line 7}} Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)			•	2				10,557.	
3	If gain, also enter in Part 1, line 8,	column (c)	nd (6)		}				N/A	
P			r Reduced	Tax on Net	Inv	_	t Inco	me	IV/ A	
	_									
·	-		10 10(4) 1431 011		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	- /				
lf s	section 4940(d)(2) applies, leave ti	his part blank								
Wa	as the foundation liable for the sec	tion 4942 tax on the distributable ar	mount of any ye	ear in the base pe	rıod?					Yes X No
<u>lf "</u>										
1_		each column for each year, see insti	ructions before	making any entri	es					7-1
	Base period years	Advisad avaliting die		Alak walvo of no					Distrib	(d) ution ratio
_		''g '''/ · · · · ·		- Net value of fic	лісна			(C	ol (b) div	ided by col (c))
_							182. 768.	_		.051058
_							490.			.047403
_							305.			.000000
_						2301				
	2004									
2	Total of line 1, column (d)							2		.141904
	• •	5-year base period - divide the total	on line 2 by 5,	or by the number	r of ye	ars				
	the foundation has been in existe	nce if less than 5 years		•				3		.035476
										-
4	Enter the net value of noncharitat	ole-use assets for 2009 from Part X,	, line 5					4		386,694.
5	Multiply line 4 by line 3							5		13,718.
										226
6	Enter 1% of net investment incor	ne (1% of Part I, line 27b)						6		226.
_	add have First 6									12 044
7	Add lines 5 and 6							7		13,944.
8	Enter qualifying distributions from	n Part XII, line 4						8		16,000.
	If line 8 is equal to or greater than	n line 7, check the box in Part VI, lin	e 1b, and comp	olete that part usin	ng a 1	% tax rate				

TIMOTHY L SLATTERY SR AND THELMA H Form 990-PF (2009) SLATTERY FOUNDATION 20-3889201 Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions 1a Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1 Date of ruling or determination letter (attach copy of letter if necessary-see instructions) b Domestic foundations that meet the section 4940(e) requirements in Part V, check here X and enter 1% 226. 1 of Part I, line 27b c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col. (b) 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) 2 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 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-5 6 Credits/Payments 226. a 2009 estimated tax payments and 2008 overpayment credited to 2009 b Exempt foreign organizations - tax withheld at source 6b c Tax paid with application for extension of time to file (Form 8868) 60 d Backup withholding erroneously withheld 6d 7 Total credits and payments Add lines 6a through 6d 226. 7 8 Enter any penalty for underpayment of estimated tax. Check here ______ if Form 2220 is attached 8 0. 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Enter the amount of line 10 to be Credited to 2010 estimated tax Refunded > 11 Part VII-A Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in Yes No any political campaign? X 1a 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 10 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 ▶ \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers > \$ 0. 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? X 2 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 3 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4a N/A b If "Yes," has it filed a tax return on Form 990-T for this year? 4b 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? X 5 If "Yes," attach the statement required by General Instruction T. 5 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 7 Did the foundation have at least \$5,000 in assets at any time during the year? X 7

Form **990-PF** (2009)

X

X

8b

10

STMT

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

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

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(i)(3) or 4942(i)(5) for calendar

	TIMOTHY L SLATTERY SR AND THELMA H				
orm	1990-PF (2009) SLATTERY FOUNDATION	20-38	89201	F	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	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 ▶ THELMA H SLATTERY Teleph	one no ▶ (402	571-7	20.	1
	Located at ► 6038 COUNTRY CLUB OAKS PL, OMAHA, NE	ZiP+4 ▶	68152-	-200	09
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/	Ά	
Pε	art VII-B Statements Regarding Activities for Which Form 4720 May Be Required	i			
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		1	/es	No
1 a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes X No		1	
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)				
	a disqualified person?	Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes X No		1	
	(5) Transfer any income or assets to a disqualified person (or make any of either available			1	
	for the benefit or use of a disqualified person)?	Yes X No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No"				
	if the foundation agreed to make a grant to or to employ the official for a period after			- 1	
	termination of government service, if terminating within 90 days)	Yes X No			
t	o 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)?	N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here	▶ _]		
C	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corre	ected			
	before the first day of the tax year beginning in 2009?		10		Х
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating fou	ındatıon			
	defined in section 4942(j)(3) or 4942(j)(5))				
a	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)				
	before 2009?	Yes X No		1	
	If "Yes," list the years			- 1	

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

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

c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here

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

3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time

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?

Form **990-PF** (2009)

X

N/A

N/A

Yes X No

2b

3b

4a

statement - see instructions)

during the year?

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

Form 990-PF (2009)

SLATTERY FOUNDATION

20-3889201

Part VIII Information About Officers, Directors, Trustees, For Paid Employees, and Contractors (continued)	oundation Managers, Highly	
3 Five highest-paid independent contractors for professional services. If non-	e, enter "NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Tetal number of others recovered over \$50,000 for preferenced converse		▶ 0
Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities		0
List the foundation's four largest direct charitable activities during the tax year. Include releva number of organizations and other beneficiaries served, conferences convened, research page.	nt statistical information such as the	Expenses
1 N/A	ers produced, etc	
I N/A		
2	-	
3		
4		
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax $1 N/A$	year on lines 1 and 2	Amount
17/11		
2		
All other program related investments. Con in the state of		· · · · · · · · · · · · · · · · · · ·
All other program-related investments. See instructions 3		
Total. Add lines 1 through 3	>	0.

20-3889201

Page 8

P	Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations, s	ee instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
а	Average monthly fair market value of securities	1a	371,337. 21,246.
b	Average of monthly cash balances	1b	21,246.
C	Fair market value of all other assets	10	
d	Total (add lines 1a, b, and c)	1d	392,583.
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	0.
3	Subtract line 2 from line 1d	3	392,583.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	5,889. 386,694.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	386,694.
6_	Minimum investment return Enter 5% of line 5	6	19,335.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here and do not complete this part)	d certain	
1	Minimum investment return from Part X, line 6	1	19,335.
2a	Tax on investment income for 2009 from Part VI, line 5		
b	Income tax for 2009 (This does not include the tax from Part VI)		
C	Add lines 2a and 2b	2c	226.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	19,109.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	19,109.
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	19,109.
	art XII Qualifying Distributions (see instructions)		
1 -	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes	1a	16 000
a		1b	16,000.
ь 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		3a	
a b		3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	16,000.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment	-	
J	income Enter 1% of Part I, line 27b	5	226.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	15,774.
•	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	400,000 101	000.0011

Form **990-PF** (2009)

Part XIII Undistributed Income (see instructions)

1 Distributable amount for 2009 from Part XI, Inn 7 2 Underbotube imcome, if any, as of the end of 2009 a Enter amount for 2008 only b Total for prior years 3 Excess distributions carryover, if any, to 2009 a From 2004 b From 2005 c From 2006 d From 2007 e From 2008 1 Total of lines 3 a through e 4 Qualifying distributions for 2009 from Part XII, Inn 4 ► \$ 16,000. a Appiled to undistributed more of prior years (Election required - see instructions) c Treated as distributions of or 2009 from years (Election required - see instructions) d Appiled to 2009 distributable amount e Remaining amount distributed or corpus (Election required - see instructions) d Appiled to 2009 distributable amount e Remaining amount distributed or corpus amount distributed or corpus amount distributed income for 2009 or 200. d Appiled to 2009 distributable amount e Remaining amount distributed income Subtract line 4 from line 20 a Cerpus Adelines 31, 4c., and 46 Subtract line 5 briory years' undistributed income Subtract line 4 from line 20 a Cerpus Adelines 31, 4c., and 46 Subtract line 5 briory years' undistributed income Subtract line 4 from line 20 a Cerpus Adelines 31, 4c., and 46 Subtract line 5 briory years' undistributed income Subtract line 4 from line 20 a Cerpus Adelines 31, 4c., and 46 Subtract line 5 briory years' undistributed income Subtract line 4 from line 20 a Cerpus Adelines 31, 4c., and 45 Subtract line 5 briory years' undistributed income Subtract line 4 from line 6 Taxable amount - see instructions and the form line 5 Taxable amount - see instructions and the form line 6 Travable amount - see instructions are undistributed income for 2008 Subtract line 4 from line 6 Taxable amount - see instructions are undistributed income for 2008 Subtract line 4 from line 6 Taxable amount - see instructions are undistributed income for 2008 Subtract line 4 from line 6 Taxable amount - see instructions are undistributed income for 2008 Subtract line 4 from line 6 Taxable amount - see instructions are undistributed income for 2	•		(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
Inter 19, 109.	1	Distributable amount for 2009 from Part XI			2000	
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d Excess from 2007		a Excess from 2005				
d Excess from 2008		b Excess from 2006				
		c Excess from 2007				
e Excess from 2009		d Excess from 2008				
		e Excess from 2009				

SLATTERY FOUNDATION Form 990-PF (2009) 20-3889201 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 c 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 "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)) SEE STATEMENT 9 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 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here 🕨 🗶 If the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds life 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

Form 990-PF (2009)

SLATTERY FOUNDATION

20-3889201

Part XV Supplementary Information				
3 Grants and Contributions Paid During the Ye		Payment		
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient		
a Paid during the year INSTITUTE FOR PRIESTLY FORMATION FOUNDATION 2500 CALIFORNIA PLAZA OMAHA, NE 68178	NONE	501(C)(3)	UNDESIGNATED	1,000.
THE NEBRASKA MEDICAL CENTER 987421 NEBRASKA MEDICAL CENTER OMAHA, NE	NONE	501(C)(3)	UNDESIGNATED	15,000.
Total	-		> 3a	16,000.
b Approved for future payment				
NONE				
Total			> 3b	0.

Unrelated business income

923621 02-02-10

Enter gross amounts unless otherwise indicated

(e)

Form **990-PF** (2009)

Excluded by section 512, 513, or 514

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

Program service revenue	(a) Business code	(b) Amount	Exclusion code	(d) Amount	Related or exempt function income
<u>a</u>	-				
b	1				
<u> </u>	[
d		<u> </u>			
e					
·					·
g Fees and contracts from government agencies					
2 Membership dues and assessments					= .
3 Interest on savings and temporary cash					
investments					
4 Dividends and interest from securities			14	12,011.	
5 Net rental income or (loss) from real estate		•••••			
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal					
property					
7 Other investment income					 -
8 Gain or (loss) from sales of assets other					
than inventory			18	10,557.	
9 Net income or (loss) from special events	1-	- ·	 	10/33/1	· ·
10 Gross profit or (loss) from sales of inventory	-		+		
11 Other revenue	-			· · · · · · · · · · · · · · · · · · ·	
ā			 		
b					
<u> </u>		 -			_
d					
e	_			00 560	
12 Subtotal Add columns (b), (d), and (e)	1. 1	0		22,568.	0.
13 Total. Add line 12, columns (b), (d), and (e)				13	22,568.
(See worksheet in line 13 instructions to verify calculations Part XVI-B Relationship of Activitie Line No. Explain below how each activity for which i	s to the Accon			•	Dishment of
the foundation's exempt purposes (other th				importantly to the accord	Sistement of
		_			
		-			
					
					

the Gode (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? 2 Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash (2) Other assets 3 Differ transactions (1) Sales of assets from a noncharitable exempt organization (2) Perchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Remturation seminar anagement is (3) Loans or loan guarantees (3) Loans or loan guarantees (3) Loans or loan guarantees (3) Performance of services or membership or fundraising selectations (3) External relations are considered or fundraising selectations (3) External relations are considered or fundraising selectations (3) Performance of services or membership or fundraising selectations (3) Performance of services or membership or fundraising selectations (3) Performance of services or membership or fundraising selectations (4) It the asset of any of the above or "Sec complete the following schedule Column (b) should always show the fair market value of the goods, other assets, or services received (4) Line received (b) Amount involved (5) Team of montharitable exempt organization (6) Amount involved (6) Amount involved (6) Team of montharitable exempt organization (7) Team of montharitable exempt organization (d) Description of relationship (6) Amount involved (9) Amount involved (1) Team of montharitable exempt organization (d) Description of relationship (a) Name of logical particles or the particles of the particles o	P	art X				and Transactions a	and Relationships With None	charitable		ige is
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In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?				<u> </u>	·					
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?										
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?]							
Under penalties of aganization (b) Type of organization (c) Description of relationship Under penalties of aganization of prepared that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Description of prepared collect than taxpayer or fiduciary) is based on all information of which preparer has any knowledge VICE PRESIDENT Signature of officer or trustee Date Preparer's identifying number self-employed in general collections and accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Description of preparer has any knowledge VICE PRESIDENT Title Preparer's identifying number self-employed in general collections and accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Description of preparer has any knowledge. VICE PRESIDENT Title Preparer's identifying number self-employed in general collections and accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Description of preparer has any knowledge. VICE PRESIDENT Title Preparer's identifying number self-employed in general collections and statements, and to the best of my knowledge and belief, it is true, correct, and complete Description of preparer has any knowledge. VICE PRESIDENT Title Preparer's identifying number self-employed in general collections and complete Description of preparer has any knowledge. I self-employed in general collections and statements, and to the best of my knowledge and belief, it is true, correct, and complete Description of preparer has any knowledge.	2a	Is the	foundation directly or indirec	tly affiliated with, or rela	ated to, one	or more tax-exempt organi	zations described			
(a) Name of organization (b) Type of organization (c) Description of relationship N/A Under penalties of penury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer has any knowledge VICE PRESIDENT Title Preparer's Signature of officer or trustee Preparer's identifying number self-employed, and a statements of the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer has any knowledge VICE PRESIDENT Title Preparer's identifying number self-employed, and a statements of the best of my knowledge and belief, it is true, correct, and complete Unit is true, correct, and correct unit is true, cor		ın se	ction 501(c) of the Code (othe	r than section 501(c)(3	i)) or in sect	tion 527?		Yes	X	No
Under penalties of nequity, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparation of pr	b	If "Ye								
Under penalties of genury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge VICE PRESIDENT Title Preparer's signature Preparer's identifying number signature Firm's name (or yours DARST AND ASSOCIATES, P.C. EIN EIN			<u>'''</u>	ganization		(b) Type of organization	(c) Description of rela	tionship		
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Signature of officer or trustee Preparer's signature Preparer's Normal Action of Act								f, it is true, corre	ct,	
Signature of officer or trustee Date Title Preparer's signature Preparer's identifying number self-employed in self-employed in self-employed it self-employed. Date Title Date Title Preparer's identifying number self-employed in self-employed in self-employed it self-employed. Date Title Preparer's identifying number self-employed in self-employed in self-employed it self-employed. Date Date Title	ŀ	and col	mplete yeclaration of preparer folia	er than taxpayer or fiduciary	/) is based on	all information of which preparer	has any knowledge			
Firm's name (or yours DARST AND ASSOCIATES, P.C. Lisettemployed), 14707 CALIFORNIA ST. STE 10		L _	Well Oll	my See		1415112	VICE PRESIDENT			
Firm's name (or yours DARST AND ASSOCIATES, P.C. Lisettemployed). 14707 CALIFORNIA ST. STE 10	ere	S	ignature of officer or truetee (Date	Title			
Firm's name (or yours DARST AND ASSOCIATES, P.C. Lisettemployed). 14707 CALIFORNIA ST. STE 10	핕	, <u> </u>	Preparer's	1 00		0.		reparer's identify	ying nun	nber
Firm's name (or yours DARST AND ASSOCIATES, P.C. Lisettemployed), 14707 CALIFORNIA ST. STE 10	Sig	ءِ"ج	signature / /Yax	d saly	er C	NA	イ/ダ/レ self- employed ► □			
14707 CALIFORNIA ST. STE 10		Par O	Firm's name (or yours DARS	T AND ASSO	CIATE	S, P.C.				
T		- Pre Us	if self-employed), 1470		IA ST	. STE 10				
address, and ZIP code OMAHA, NE 68154-1952 Phone no 402-498-9100	\perp		address, and ZIP code OMAH	IA, NE 6815	4-195	2	Phone no 40	2-498-	910	0

Part IV Capital Gains and Los	ses for Tax on Investment Income				
	describe the kind(s) of property solick warehouse, or common stock, 2		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a BANK OF AMERICA			P	06/01/65	
b BANK OF AMERICA			P	06/01/65	
c BANK OF AMERICA			P	03/04/08	
d FRONTIER COMMUN			P	04/25/06	
e FRONTIER COMMUN		RS COMMON STOCK	P	02/20/08	
f					
^					
h					
1					
k					
<u>l</u>					
m					
<u> </u>					
0					
(e) Gross sales price	(f) Depreciation allowed	(g) Cost or other basis	(h) Gain or (loss)	
	(or allowable)	plus expense of sale	(9)	olus (f) minus (g)	
14,262.		101.			14,161.
7,388.		52.			7,336.
8,302.		19,352.			<11,050.
1,067.		980.			87.
1,067.		1,044.			23.
					
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1					
Complete only for accets chawn	g gain in column (h) and owned by	the foundation on 12/21/60			
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	Gains (excess	sses (from col (h)) of col (h) gain ovei iot less than "-0-")	
a		(), (1)			14,161.
)					$\frac{14,101.}{7,336.}$
;					<11,050.
<u>, </u>	-				87.
)			-		23.
				<u>_</u>	
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	- 14 -	un Dankli kan 7			-
Capital gain net income or (net ca	pital loss) { If gain, also enter "-0"	r in Part I, line 7)-" in Part I, line 7			10,557.
Net short-term capital gain or (los		\ \			
If gain, also enter in Part I, line 8,	column (c)	}		N/A	

FORM 990-PF DIVIDEND	S AND	INTER	EST FROM	SECUE	RITIES	STATEMENT	1
SOURCE		GROSS	AMOUNT		TAL GAINS	COLUMN (A) AMOUNT	
VARIOU - DIVIDEND VARIOUS - INTEREST	•		11,182. 829.		0.	11,18	
TOTAL TO FM 990-PF, PART I, I	LN 4		12,011.		0.	12,01	1.
FORM 990-PF	AC	COUNTI	NG FEES			STATEMENT	2
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INV MENT IN		(C) ADJUSTED NET INCOM		
ACCOUNTING FEES		735.	0.				0.
TO FORM 990-PF, PG 1, LN 16B		735.		0.			0.
FORM 990-PF		TAX	ES			STATEMENT	3
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INV MENT IN	EST-	(C) ADJUSTED NET INCOM		
IRS		184.	-	0.			0.
TO FORM 990-PF, PG 1, LN 18		184.		0.			0.
	0'	THER E	XPENSES		·	STATEMENT	4
FORM 990-PF							
DESCRIPTION	EXPE	A) NSES BOOKS		EST-	(C) ADJUSTED NET INCOM		
	EXPE	NSES	NET INV	EST-	ADJUSTED	CHARITAB E PURPOSE	

FORM 990-PF	CORPORATE STOCK		STATEMENT 6
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
BOSTON SCIENTIFIC		13,458.	6,420.
VERIZON		30,609.	32,010.
CISCO SYSTEMS		14,669.	19,160.
DELL INC.		445.	13,220.
MICROSOFT		14,890.	12,629.
ORACLE		2,914.	27,045.
AT & T		16,935.	13,895.
AMERICAN INTL GROUP		30,954.	3,555.
BANK OF AMERICA		12,414.	10,950.
HEWLETT PACKARD		11,240.	20,965.
PINNACLE WEST		5,369.	20,210.
TIME WARNER		18,360.	30,770.
UNITED HEALTH GROUP		155.	36,520.
MORGAN STANLEY		9,262.	12,230.
AMN ELEC POWER		13,326.	17,800.
FORD MOTOR COMPANY		9,502.	15,940.
ELI LILLY & CO		9,898.	10,098.
QUALCOMM		21,390.	23,410.
BOEING		13,958.	12,754.
CITIGROUP		3,676.	4,200.
DUKE ENERGY		16,420.	17,550.
GE MECO EMERCY		16,230.	15,830.
TECO ENERGY		15,800.	16,750.
TOTAL TO FORM 990-PF, PART I	I, LINE 10B	301,874.	393,911.

FORM 990-PF	LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10	STATEMENT	
NAME OF CONTRIBUTOR	ADDRESS		

TIMOTHY L AND THELMA H SLATTERY 6038 COUNTRY CLUB OAKS PL OMAHA, NE 68152-2009

	IST OF OFFICERS, DIRECTORS ND FOUNDATION MANAGERS		STATEMENT 8	
NAME AND ADDRESS	TITLE AND AVRG HRS/WK		EMPLOYEE BEN PLAN CONTRIB	
TIMOTHY L SLATTERY, SR. 6038 COUNTRY CLUB OAKS PL OMAHA, NE 68152-2009	DIR, PRES, TRE	EAS 0.	0.	0.
THELMA H SLATTERY 6038 COUNTRY CLUB OAKS PL OMAHA, NE 68152-2009	DIR, VP, SEC 0.20	0.	0.	0.
DAVID E SLATTERY 9741 FIELDCREST OMAHA, NE 68114	DIR 0.20	0.	0.	0.
TIMOTHY L SLATTERY, JR. 15405 LLOYD ST OMAHA, NE 68144	DIR 0.20	0.	0.	0.
DANIEL S SLATTERY 2135 S 182 CIRCLE OMAHA, NE 68130	DIR 0.20	0.	0.	0.
SHARON E SLATTERY 42599 CAPRI DRIVE BERMUDA DUNES, CA 92201	DIR 0.20	0.	0.	0.
MARION S BENDON 13310 BEDFORD AVE OMAHA, NE 68164	DIR 0.20	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE	6, PART VIII	0.	0.	0.

FORM 990-PF

PART XV - LINE 1A LIST OF FOUNDATION MANAGERS STATEMENT 9

NAME OF MANAGER

TIMOTHY L SLATTERY, SR. THELMA H SLATTERY