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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 POTTSTOWN MERCURY FOUNDATION		A Employer identification number 23-6256419
	Number and street (or P O box number if mail is not delivered to street address) 24 NORTH HANOVER STREET	Room/suite	B Telephone number 610-323-3000
	City or town, state, and ZIP code POTTSTOWN, PA 19464		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"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 58,535. (Part I, column (d) must be on cash basis)		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	53,885.		N/A	
2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	56.	56.		STATEMENT 1
4	Dividends and interest from securities				
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10				
b	Gross sales price for all assets on line 6a				
7	Capital gain net income (from Part IV, line 2)		0.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less Cost of goods sold				
c	Gross profit or (loss)				
11	Other income				
12	Total Add lines 1 through 11	53,941.	56.		
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	1,315.	0.		0.
c	Other professional fees				
17	Interest				
18	Taxes				
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses	300.	94.		0.
24	Total operating and administrative expenses Add lines 13 through 23	1,615.	94.		0.
25	Contributions, gifts, grants paid	53,306.			53,306.
26	Total expenses and disbursements. Add lines 24 and 25	54,921.	94.		53,306.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	-980.			
b	Net investment income (if negative, enter -0-)		0.		
c	Adjusted net income (if negative, enter -0-)			N/A	

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
Assets	1 Cash - non-interest-bearing			59,515.	58,535.	58,535.
	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					
	c Investments - corporate bonds					
	11 Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation ▶					
	12 Investments - mortgage loans					
	13 Investments - other					
14 Land, buildings, and equipment basis ▶ Less accumulated depreciation ▶						
15 Other assets (describe ▶)						
16 Total assets (to be completed by all filers)				59,515.	58,535.	58,535.
Liabilities	17 Accounts payable and accrued expenses					
	18 Grants payable					
	19 Deferred revenue					
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable					
22 Other liabilities (describe ▶)						
23 Total liabilities (add lines 17 through 22)				0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24 Unrestricted			59,515.	58,535.	
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.					
	27 Capital stock, trust principal, or current funds					
	28 Paid-in or capital surplus, or land, bldg., and equipment fund					
29 Retained earnings, accumulated income, endowment, or other funds						
30 Total net assets or fund balances				59,515.	58,535.	
31 Total liabilities and net assets/fund balances				59,515.	58,535.	

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	59,515.
2 Enter amount from Part I, line 27a	2	-980.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	58,535.
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	58,535.

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			
b	NONE		
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			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2
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

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	40,760.	50,328.	.809887
2007	38,670.	41,370.	.934735
2006	39,107.	25,843.	1.513253
2005	33,483.	14,131.	2.369471
2004	54,669.	18,626.	2.935091

2 Total of line 1, column (d)	2 8.562437
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 1.712487
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4 58,140.
5 Multiply line 4 by line 3	5 99,564.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6 0.
7 Add lines 5 and 6	7 99,564.
8 Enter qualifying distributions from Part XII, line 4	8 53,306.

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)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	0.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	0.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	0.
6	Credits/Payments:		
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	0.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.
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 <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

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. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
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) <u>PA</u>		
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

Form 990-PF (2009)

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	X	
14	The books are in care of ► <u>POTTSTOWN MERCURY</u> Located at ► <u>POTTSTOWN, PENNSYLVANIA</u>	Telephone no. ►	<u>(610) 323-3000</u>	
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		<u>N/A</u>

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	<u>N/A</u>	
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?		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? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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.)	<u>N/A</u>	
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.)	<u>N/A</u>	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

Form 990-PF (2009)

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

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?

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

6b

X

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

☐ 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
THOMAS ABBOTT C/O THE POTTSTOWN MERCURY, 24 N HANOV	DIRECTOR 1.00	0.	0.	0.
NANCY MARCH C/O THE POTTSTOWN MERCURY, 24 N HANOV	OFFICER 1.00	0.	0.	0.
PATRICIA MCKELVEY C/O THE POTTSTOWN MERCURY, 24 N HANOV	OFFICER 1.00	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

Form 990-PF (2009)

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	0.
b	Average of monthly cash balances	1b	59,025.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	59,025.
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	59,025.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	885.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	58,140.
6	Minimum investment return. Enter 5% of line 5	6	2,907.

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	2,907.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,907.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	2,907.
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	2,907.

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	53,306.
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	53,306.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	53,306.

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.

Form 990-PF (2009)

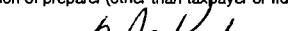



Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				2,907.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	53,738.			
b From 2005	32,776.			
c From 2006	37,815.			
d From 2007	36,601.			
e From 2008	38,244.			
f Total of lines 3a through e	199,174.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$	53,306.			
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				2,907.
e Remaining amount distributed out of corpus	50,399.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	249,573.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	53,738.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	195,835.			
10 Analysis of line 9:				
a Excess from 2005	32,776.			
b Excess from 2006	37,815.			
c Excess from 2007	36,601.			
d Excess from 2008	38,244.			
e Excess from 2009	50,399.			

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- | | | Yes | No |
|----------|--|-----|----|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | | X |
| | (2) Other assets | | X |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | | X |
| | (2) Purchases of assets from a noncharitable exempt organization | | X |
| | (3) Rental of facilities, equipment, or other assets | | X |
| | (4) Reimbursement arrangements | | X |
| | (5) Loans or loan guarantees | | X |
| | (6) Performance of services or membership or fundraising solicitations | | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

- | | | | | |
|--------------------------|---|--|---|--|
| Sign Here | Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge. | | | |
| | 
Signature of officer or trustee | | Date
2/9/11 | 
Title |
| Paid Preparer's Use Only | Preparer's signature
 | | Date
1/27/11 | Check if self-employed <input type="checkbox"/> |
| | Firm's name (or yours if self-employed), address, and ZIP code
MAILLIE FALCONIERO & COMPANY, LLP
PO BOX 680
OAKS, PA 19456-0680 | | EIN 
Phone no. (610) 935-1420 | |

2009.05030 POTTSTOWN MERCURY FOUNDATIO 69069 1

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

SOURCE	AMOUNT
SUSQUEHANNA BANK CHECKING ACCOUNT	56.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	56.

FORM 990-PF ACCOUNTING FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	1,315.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	1,315.	0.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK FEES	94.	94.		0.
MISCELLANEOUS EXPENSE	10.	0.		0.
REGISTRATION	100.	0.		0.
POST OFFICE EXPENSE	96.	0.		0.
TO FORM 990-PF, PG 1, LN 23	300.	94.		0.

FOOTNOTES STATEMENT 4

ATTACHMENT TO FORM 990-PF, PAGE 10, PART XV,
 QUESTION 3, GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR OR
 APPROVED FOR FUTURE PAYMENT

THE FOUNDATION PROVIDED ASSISTANCE TO INDIGENT AND NEEDY
 FAMILIES IN THE POTTSTOWN COMMUNITY THROUGH
 OPERATION HOLIDAY

THE FOUNDATION OBTAINED A LIST OF NAMES OF INDIGENT AND
 NEEDY FAMILIES FROM THE FOLLOWING SEC. 501(C)(3)
 ORGANIZATIONS:

SALVATION ARMY, 409 SOUTH READING AVENUE, BOYERTOWN, PA
UNITED WAY OF POTTSTOWN & VICINITY, 360 KING STREET,
POTTSTOWN, PA
POTTSTOWN CLUSTER OF RELIGIOUS COMMUNITIES, 360 KING STREET,
POTTSTOWN, PA

THE FOUNDATION'S ADMINISTRATIVE STAFF REVIEWS THE LISTS
PRIOR TO MAKING DISTRIBUTIONS OF FOOD AND TOYS.

OPERATION HOLIDAY INVOLVES THE DISTRIBUTION OF TOYS AND FOOD
TO INDIGENT AND NEEDY FAMILIES AT CHRISTMAS.

2009 OPERATION HOLIDAY

198 Families
544 Children (+2 extra)

Montgomery County Head Start (Pottstown 1-2-3)
301 King St.
Pottstown, PA 19464
JoAnna Figueroa
610-326-9177

1. Lloyd Dean
570-234-6527
3 children
2. Brenda Morgan
484-524-8958
2 children
3. Michael Taylor
484-401-0486
2 children
4. Courtney Nixon
484-480-1879
2 children
5. Kimbra Eagle
610-323-2605
4 children
6. Sodonía Medunic
610-970-3015
2 children
7. Jennifer Hutson
484-300-2725
1 child
8. Carline Menady
954-515-7472
2 children
9. Laura Venezia
610-323-0639
4 children
10. Christin McFalls
484-624-3462
2 children
11. Jarius Allen
610-326-1199
4 children

12. Chasity Skeleton
484-350-0156
5 children
13. William Welliver
484-318-3249
3 children
14. Colleen Becker
484-366-9239
5 children
15. Janel Green
484-363-0779
4 children
16. April Jones
610-970-9008
2 children
17. Stephanie Rommel
610-342-6131
4 children
18. Kimberly Cotton
610-970-1979
5 children
19. Erica Gosha
610-327-1431
4 children
20. Michael Rodriguez
484-638-8426
6 children
21. Kayanna Stutzman
484-949-8380
3 children
22. Ronald Benton
484-401-0419
4 children
23. Evelyn Moehring
484-948-5379
2 children

**Pottstown Family Center
1976 East High St.
Suite 203
Pottstown, PA 19464**

Jessica McCartin
610-326-1610 x 243

24. Sarah Erskine and Bart Barron
484-300-0192
1 child
25. Stephanie Yoder and Paul VanNorman
484-619-7563 (4)
2 children
26. Ericka Ray and Joshua Brant
484-941-6577
1 child
27. Trisha Allen
484-634-0476
1 child
28. Patricia Schade
484-300-4127
1 child (granddaughter)
29. Elizabeth Sanchez and Winston Hill
267-584-8016
2 children
30. Samar Meselhay
484-363-9686
2 children
31. Mandy Houck
484-624-4198
3 children
32. Vicky and Floyd Scholten
610-620-7883
3 children
33. Stephanie Carey
267-424-5968
2 children

North Coventry Food Pantry
148 W. Main St.
Pottstown, PA 19465
Ginny Wade
610-326-5659 or 484-614-0190

34. Christine Rizzuti
484-300-4443
1 child
35. Anthony Ortiz
610-842-7817
1 child
36. Donna Brown
484-949-4900
1 child
37. Carrie Heasley
484-921-5279
2 children
38. James Yerger
610-326-5659
1 child
39. Linda Morgan
610-705-8716
1 child
40. Carol Hedgepeth
610-705-8716
1 child
41. Diane Rhoads
484-661-0738
5 children
42. Tonya Brown
610-323-6083
2 children
43. Wendy Ripley
484-363-1052
2 children

**Phoenixville Hospital
140 Nutt Rd.
Phoenixville, PA 19460
Kathy Wilson
610-983-1415 or 610-983-1000 (have her paged)**

44. Kevin Granger

484-435-4693

1 child

45. Elizabeth Sanchey

267-584-8016

2 children

46. Amber Osisek

610-716-2444

4 children

47. Debbie Castelbuono

610-933-5879

3 children

48. Jennifer Bender

484-390-9083

2 children

49. Lea Barker

610-203-7933

2 children

50. Tabitha Psota

610-698-4991

4 children

51. Erica Murphy

610-630-6623

3 children

52. Shannon Ivey

484-624-5375

1 child

53. Shannon Knight

484-948-7343

3 children

Montgomery County Head Start (Lower Pottsgrove)

699 N. Pleasant View Rd.

Pottstown, PA 19464

Alice Long

610-326-5908 or 610-326-9205

54. Sharon Nunez

610-842-8118

6 children

- 55. Kiara Oliver
484-624-3343
3 children
- 56. Jennifer Scheidel
484-363-9960
3 children
- 57. Antoinette Jenkins
484-300-3013
3 children
- 58. Brittany Cox
610-327-3471
3 children
- 59. Gale Youse
610-718-9207
2 children
- 60. Kelly Baker
267-902-5283
6 children
- 61. Elshafey Awatey
484-841-3150
6 children
- 62. Kesha Hayes
267-421-6298
3 children
- 63. Vanessa Smith
484-948-5001
3 children

Montgomery County Head Start (Ricketts, Emmanuel, PEAK)
301 King St.
Pottstown, PA 19464
Karla Esposito
kesposito@montcohs.org
610-326-9177 or 484-624-1176 (cell)

Ricketts

- 64. Nicole Frisco
610-323-5024
2 children

- 65. Divina Miguel
610-327-1065
1 child
- 66. Jodie Sczzerbowicz
484-824-17523
2 children
- 67. Uvalda Sanchez
484-300-7833
1 child
- 68. Alma Linares
610-906-9240
2 children
- 69. Mayra Damian
828-399-9739
1 child
- 70. Dannielle Hudson
484-366-5517
3 children
- 71. Lourdes Moran
484.250.6444
2 child
- 72. Ashley Tinson
484-363-9874
4 Child
- 73. Silvia Tapia
302-757-2963
3 children

Emmanuel

- 74. Shyree Gibbs
484-300-2284
6 children
- 75. Theresa Watson
484-524-5252
2 children
- 76. Michelle Righthour
610-323-2795
2 children
- 77. Leah Smith
215-789-8355
2 children
- 78. Tameka Marshall

484-977-0882

3 children

79. Adria Henry
267-438-1553
1 child

80. Katie Washabaugh
No phone
1 child

PEAK

81. Shantae Garner
267-230-3367
4 children

82. Stephanie Oconnor
610-906-2863
5 children

83. Amanda Shore
484-948-6729
1 child

84. Gina Nagy
484-624-4429
2 children

85. Shante Lofton
484-538-6062
4 children

86. Corina Zabala
484-977-0700
2 children

87. Heather Gibson
484-366-3273
3 children

88. Neiasha Sepulveda
610-906-3372
3 children

89. Lateyia Washington
484-941-6338
3 children

90. Tisha Warrick
484-977-0756
3 children

The Pottstown Cluster of Religious Communities
137 Walnut St.
Pottstown, PA 19464
Lylly Smithson

610-970-5995

91. Michael Heffner
610-323-7015
4 children
92. Cheyanna Reber
484-366-9227
4 children
93. Paula Lloyd
267-249-0039
8 children
94. April Saul
484-300-6960
3 children
95. Kim Glover
484-524-2299
2 children
96. Lotofanyame (Tifa) Boynes
610-326-3107
3 children
97. Jade Barlow
484-366-2124
3 children
98. Linda Morgan
484-624-5610
1 child
99. Peri Furlong
610-705-3691
7 children
100. Adria Oister
610-226-7038
6 children
101. Tashemia Sharp.
484-624-4747
4 children
102. Robert and Pam Hadrick
610-970-2922
3 children
103. Amanda Nihart
484-363-9488
7 children
104. Melissa Cornwall
484-363-7650

4 children

105. Lisa Viola
610-705-8827
5 children

106. Serena Gissentaner
484-363-7224
2 children

107. James Shifflette
610-326-2822
3 children

108. Maureen Walker
610-762-0168
2 children

109. Sophia Rowe
610-326-6924
2 children

110. Melanie Scavello
484-363-9131
2 children

Community Health and Dental Care
11 Robinson Street
Pottstown, PA 19464
Linda Gambone
lgambone@ch-dc.org
610-326-9460

111. Sophie Livingston
610-310-3865
1 Child

112. Dawn Briggs
484-338-5013
2 Children

113. Carolyn Bright
484-624-5902
2 Children

114. Stephanie Yoder
484-619-7564
2 Children

115. Bianca Charles
267-750-8749
5 Children

116. Melissa Huber
610-792-1247
4 Children

117. Tracey Accor
484-524-8859
6 Children
118. Patty Campli
610-705-0602
4 Children
119. Kelly Mearing
610-705-3107
2 Children
120. Renada Beasley
484-941-5569 or 484-948-9819
4 children

Montgomery County Community College
101 College Drive
Pottstown, PA 19464
Lori Davidson
LDavidso@mc3.edu
610-718-1841

121. Shakirah Annable
484-363-3385
3 children
122. Jonelle Beekley
484-624-3137
2 children
123. Rachelle Hill
484-624-9491
2 children
124. Tren Jackson
484-302-6591
3 children
125. Heather Jaramillo
484-213-2893
3 children
126. Crystal Kehler
610-845-0635
2 children
127. Jessica Kwarta
610-568-8917
2 children
128. Lauren Olson
484-524-8784

3 children

129. Fatisha Quainoo
484-334-1101
1 child

130. Ashley Stoy
610-564-9648
1 child

Creative Health Services
11 Robinson St.
Pottstown, PA 19464
610-326-2767

131. John and Doreen Post
(610) 718 -1118
3 children

132. LaDonna Singleton
(610) 323-6209 or (484) 363-9368
4 children

133. Flora Taylor
(610) 850-5737
3 children

134. Tina Nester
(484) 480-0037
3 children

135. Zina Sutton
(484) 941-6084
2 children

136. Joanne Sheeler
(610) 948-0599
4 children

137. Oscar Hilbert
(610) 587-3652 or (610) 369-1790
4 Children

138. Susan Schiffert
(484) 300- 9843
1 child

139. Dawn Mossie
(610) 948-7036
2 Children

140. Mack and Bridgett Ferrier
484-366-3121
3 children

Sherwood Park Community Development Corp.
2120 Buchert Rd.
Pottstown, PA 19464
Vernon Moore
610-323-2554

141. Shanita Bethea
484-366-9497
1 child

142. Zakiyah Jettel
484-524-8699
3 children

143. Norma Navarette
610-235-3442
2 children

144. Charollette Barnes
610-970-9236
1 child

145. Samiyah Carter
215-921-6067
3 children

146. Terry Laws
484-686-8125
2 children

147. Takya Gardner
484-949-8070
2 children

148. Chanice Johnson
215-730-7792
2 children

149. Jasmine Bunyun
267-519-1114
1 child

150. Ms. McClendon
484-924-8290
2 children

Pottstown School District Administration Annex
940 N. Franklin St.
Pottstown, PA 19464
Holly Lee
hlee@pottstownsd.org
610-970-6691

151. Sherri Horchak
610-718-9166
1 child

152. Theresa Shawell
484-366-4776
5 children

153. Gisele Santiago
484-300-2398
5 children

154. M/M John Renish
484-363-3934
4 children

155. M/M Carlos Olvera
484-324-3262
2 children

156. Susan Parson
484-366-3090
5 children

157. William Lowe
484-366-9285
6 children

Park Springs Apartments
1800 Park Spring Blvd.
Spring City, PA 19475
Ed Rodriguez
610-948-6203

158. Robin Appling
484-369-8466
2 children

159. Beatrice Cooper
484-932-8193
2 children

160. Lori Lorenzo
610-755-2416
1 child

161. Jen Doris
484-932-8621
3 children

162. Cassandra Thatcher
610-948-4519
1 child

163. Donna Anderson
484-325-9947

1 child

164. Karen Salley
484-938-7711
2 children

Montgomery County Assistance Office
1931 New Hope St.
Norristown, PA 19401
Everett Varan
610-270-3550

165. Christopher Miller
484-300-2955
2 children

166. Eunice Rome
610-342-5100
2 grandchildren

167. Yvonne Claitt
484-401-2324
7 grandchildren

168. Brianna Simcox
610-970-1209
1 child

169. Elizabeth Cook
215-520-3608
3 children

170. Crystal Kime
484-524-2407
2 children

171. Kalinda Tinson
No Phone
2 children

Women's Center of Montgomery County
1800 E. High St.
Suite 350
Pottstown, PA 19464
Kristine Wickward
610-970-7364

172. Terry N.
484-480-1638
1 child

173. Stephanie S.
610-898-9535
1 child

174. Jessica B.
267-973-5282
1 child

175. Malia J.
610-310-2395
1 child

176. Teka D.
484-948-6867
4 children

177. Yajaira N.
484-764-7717
2 children

178. Tara S.
484-524-2053
2 children

179. Angela M.
610-326-6696
2 children

180. Carrie G.
610-400-4776
2 children

181. Evelyn M.
484-948-5379
2 children

Green Lane Head Start
3004 Main St.
Green Lane, PA 18054
Sue Esterline
215-234-1860 or 61
267-371-2142 (cell)

182. Heather Pickersgill
267-496-2421
2 children

183. Jennifer & Leroy Sacks
610-908-9328
4 children

184. Tashawnda Hill
267-237-8342
3 children

Zion's UCC
Hanover & Chestnut Sts.
Pottstown 19464
Peter Nichols, Pastor

610-323-3637

185. Lisa and Tony Basile
610-970-0692
2 children
186. Kim and Colt Staton
484-300-5891
1 child
187. Ed and Lori O'Brien
610-326-0854
2 children

**Owen J. Roberts School District
Administration Building
901 Ridge Rd.
Pottstown, PA 19465
Elena Tobin
610-469-5170**

**North Coventry Elementary School
Sue Grashof
610-469-5184**

188. Heather Cristman
610-327-3217
5 children
189. Melissa Gething
484-624-3571
2 children
190. Barbara Guerrero
484-949-9224
1 child
191. Sarah Swanson
484-300-8920
2 children
192. Evelyn Uphold
610-705-3435
1 child

**YWCA Literacy Center
1830 E. High St., Lower Level
Pottstown, PA 19464
Laura English**

lenglish@ywcatricountyarea.org

610-326-7323

193. Seneca Leason
484-524-8908
3 children

194. Jamila Watson
610-718-1723
4 children

195. Joyce Mort
484-300-4588
3 children

Birthright of Pottstown
327 King St.
Pottstown, PA 19464
Dorothy Olshefski
610-327-2626 or 484-366-3716 (cell)

196. Ashley Fillman
484-368-9169
2 children

Montgomery County Early Intervention Service
1610 Medical Dr.
Suite 100
Pottstown, PA 19464
Alexa Pisarek
610-326-7510

197. Tiffany Eckert
610-906-0744
4 children

Montgomery County Head Start
Executive Director
Fini Alegre
267-575-0539 (cell)
falegre@montcohs.org

198. JoAnna Figueroa
267-575-0539
5 children

Pat Sommers
199. James and Jennifer Ziegler
610-913-0909
4 children

THE MERCURY

Publishers of The Mercury and The Penny Pincher

PROOF OF PUBLICATION OF NOTICE

Under Act No. 587, Approved May 6, 1929

STATE OF PENNSYLVANIA
COUNTY OF MONTGOMERY SS:

Mary Ann Matalavage, of The Mercury, of the County and State aforesaid, being duly sworn, deposes and says that THE MERCURY, a newspaper of general circulation published at 24 N. Hanover Street, Borough of Pottstown, County and State aforesaid, was established September 29, 1931 since which time, THE MERCURY has been regularly issued in said County, and that the printed notice of publication attached hereto is exactly the same as printed and published in the regular editions and issues of the said THE MERCURY on the following dates; viz.

February 8, 2011

Affiant further deposes that he/she is duly authorized by THE MERCURY, a newspaper of general circulation, to verify the foregoing statement under oath, and affiant is not interested in the subject matter of the aforesaid notice of advertisement, and that all allegations in the foregoing statements as to time, place and character of publication are true.

Copy of Notice or Publication

THE ANNUAL REPORT
of the Pottstown Mer-
cury Foundation for
the year ending No-
vember 30, 2009 &
2010 is available for in-
spection at its principal
office located at 24 N
Hanover Street, Pott-
stown, PA, during its
regular business
hours by any citizen
who requests this
within 180 days of pub-
lication of this notice

Mary Ann Matalavage
Mary Ann Matalavage, Classified Manager

Sworn to and subscribed before me this 8th

day of February, 2011.

Cindy L. Eisenhower
Notary Public

My Commission Expires: _____

Commonwealth of Pennsylvania
Notary Seal
Cindy L. Eisenhower, Notary Public
Pottstown Borough, Montgomery County
My Commission ends March 9, 2013
Member, Pennsylvania Association of Notaries