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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

OMB No 1545-0052
2009

For calendar year 2009, or tax year beginning 12-01-2009 , and ending 11-30-2010

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 PHYLLIS PERRY HULTON EDUCATIONAL TRUST BOWMAN & MILLER PC		A Employer identification number 42-6526655	
	Number and street (or P O box number if mail is not delivered to street address) PO BOX 1635		Room/suite	B Telephone number (see page 10 of the instructions) (641) 753-9337
	City or town, state, and ZIP code MARSHALLTOWN, IA 50158		C If exemption application is pending, check here ☐ D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		I Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐ F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,929,411				

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) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	92,155	92,155		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	44,634			
	b Gross sales price for all assets on line 6a _____ 270,713				
	7 Capital gain net income (from Part IV, line 2)		44,634		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
Operating and Administrative Expenses	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	136,789	136,789		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	2,068	0		0
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	1,243	0		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	50	0		0
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	3,361	0		0
	25 Contributions, gifts, grants paid	94,500			94,500
	26 Total expenses and disbursements. Add lines 24 and 25	97,861	0		94,500
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	38,928			
	b Net investment income (if negative, enter -0-)		136,789		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	4,490	2,239	2,239
	2	Savings and temporary cash investments	100,692	100,360	100,360
	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 (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	1,237,787	1,279,298	1,800,537
	c	Investments—corporate bonds (attach schedule).	24,204	24,204	26,275
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,367,173	1,406,101	1,929,411	
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 (attach schedule)			
	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 ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	1,367,173	1,406,101	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	0	0	
	30	Total net assets or fund balances (see page 17 of the instructions)	1,367,173	1,406,101	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	1,367,173	1,406,101	

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 1,367,173
2	Enter amount from Part I, line 27a	2 38,928
3	Other increases not included in line 2 (itemize) ▶ _____	3 0
4	Add lines 1, 2, and 3	4 1,406,101
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 1,406,101

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)
1 a	MONSANTO - 835 SHARES	P	1991-06-01	2010-03-22
b	MONSANTO - 1300 SHARES	P	1991-06-01	2010-05-20
c	ROYAL BK OF SCOTLAND - 9475 SHARES	P	2008-11-01	2010-05-31
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 59,985		9,260	50,725
b 81,298		14,417	66,881
c 129,430		202,402	-72,972
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))
(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	
a			50,725
b			66,881
c			-72,972
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	44,634
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) (see pages 13 and 17 of the instructions) 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 page 18 of the 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	93,175	1,971,849	0 047253
2007	85,025	1,757,700	0 048373
2006	84,130	14,539	5 786505
2005	53,500	37,154	1 439953
2004	45,959	7,586	6 058397

2 Total of line 1, column (d).	2	13 380481
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	2 676096
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.	4	1,900,470
5 Multiply line 4 by line 3.	5	5,085,840
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	1,368
7 Add lines 5 and 6.	7	5,087,208
8 Enter qualifying distributions from Part XII, line 4.	8	94,500

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 on page 18

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)		
1aExempt 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)		
bDomestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		12,736
cAll other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		0
3Add lines 1 and 2.		2,736
4Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		0
5Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		2,736
6Credits/Payments		
a2009 estimated tax payments and 2008 overpayment credited to 2009	6a	
bExempt foreign organizations—tax withheld at source	6b	
cTax paid with application for extension of time to file (Form 8868)	6c	
dBackup withholding erroneously withheld	6d	
7Total credits and payments Add lines 6a through 6d.		0
8Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		81
9Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		2,817
10Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		
11Enter the amount of line 10 to be Credited to 2010 estimated tax ☐ Refunded ☐		

Part VII-AStatements Regarding Activities			
1aDuring 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?			YesNo
bDid it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the 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.			No
cDid the foundation file Form 1120-POL for this year?.			No
dEnter 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			
eEnter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ 0			
2Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.			No
3Has 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			No
4aDid the foundation have unrelated business gross income of \$1,000 or more during the year?.			No
bIf "Yes," has it filed a tax return on Form 990-T for this year?.			
5Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.			No
6Are 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?			Yes
7Did 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			Yes
8aEnter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ☐ _____			
bIf 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 .			Yes
9Is 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 on page 27)? If "Yes," complete Part XIV			No
10Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses			No

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 page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of JAMES R BOWMAN Telephone no (641) 753-9337 Located at 24 E MAIN STREET MARSHALLTOWN IA ZIP+4 50158			
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.			

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? Yes No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. Yes No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes 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)?. Yes 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). Yes 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.	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		No
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 20____, 20____, 20____, 20____			
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 page 20 of the instructions).	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 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. Yes 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.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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)? (see page 22 of the instructions).	☐ 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 page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	5b	Yes	
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? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870.</i>	6b		No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	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 (see page 22 of the instructions).				
(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 Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). 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

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 SCHOLARSHIP GRANTS - A MINIMUM OF 40 AWARDS GIVEN EACH YEAR	94,500
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions	
3	
Total. Add lines 1 through 3.	0

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	0
b	Average of monthly cash balances.	1b	0
c	Fair market value of all other assets (see page 24 of the instructions).	1c	1,929,411
d	Total (add lines 1a, b, and c).	1d	1,929,411
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	1,929,411
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	28,941
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,900,470
6	Minimum investment return. Enter 5% of line 5.	6	95,024

Part XI

Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	95,024
2a	Tax on investment income for 2009 from Part VI, line 5.	2a	2,736
b	Income tax for 2009 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,736
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	92,288
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	92,288
6	Deduction from distributable amount (see page 25 of the instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	92,288

Part XII

Qualifying Distributions (see page 25 of the 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	94,500
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	94,500
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	94,500
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				92,288
2 Undistributed income, if any, as of the end of 2008				
a Enter amount for 2008 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2009				
a From 2004.				42,402
b From 2005.				53,350
c From 2006.				85,000
d From 2007.				
e From 2008.				
f Total of lines 3a through e.	180,752			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 94,500				
a Applied to 2008, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .	0			
d Applied to 2009 distributable amount.				92,288
e Remaining amount distributed out of corpus	2,212			
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	182,964			
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 page 27 of the instructions . . .		0		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			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) (see page 27 of the instructions).	0			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions).	42,402			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	140,562			
10 Analysis of line 9				
a Excess from 2005. . . .				53,350
b Excess from 2006. . . .				85,000
c Excess from 2007. . . .				
d Excess from 2008. . . .				
e Excess from 2009. . . .				2,212

Part XIV

1a

D

2a

Part XV

1

3

5

2

Check here ☐

a

b

C

d

THE APPLICANT MUST HAVE GRADUATED FROM A HIGH SCHOOL LOCATED IN MARSHALL COUNTY, IA

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	94,500
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
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	92,155	
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						44,634
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory. . .						
11 Other revenue a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e). . .			0		92,155	44,634
13 Total. Add line 12, columns (b), (d), and (e). 13						136,789

[illegible]

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

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

[illegible]

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

b If "Yes," complete the following schedule		
(a) Name of organization	(b) Type of organization	(c) Description of relationship

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge				
*****		2011-01-11		*****
Signature of officer or trustee		Date		Title
Paid Preparer's Use Only	Preparer's Signature  JAMES R BOWMAN		Date	Check if self-employed 
	Firm's name (or yours if self-employed), address, and ZIP code		BOWMAN & MILLER PC	Preparer's identifying number (see Signature on page 30 of the instructions)
	24 EAST MAIN STREET		24 EAST MAIN STREET	EIN 
MARSHALLTOWN, IA 50158		Phone no (641) 753-9337		

Additional Data

Software ID: 09000028
Software Version: 2009.05000
EIN: 42-6526655
Name: PHYLLIS PERRY HULTON EDUCATIONAL TRUST
BOWMAN & MILLER PC

Form 990PF Part VIII Line 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
WILLIAM BALTISBERGER	TRUSTEE 0 00	0	0	0
1110 SUMMIT STREET MARSHALLTOWN,IA 50158				
NAN BENSON	TRUSTEE 0 00	0	0	0
2325 JESSUP AVENUE STATE CENTER,IA 50247				
JULIE LANG	TRUSTEE 0 00	0	0	0
601 W MAIN STREET MARSHALLTOWN,IA 50158				
STEVE STORJOHANN	TRUSTEE 0 00	0	0	0
1209 GLENWOOD TERRACE MARSHALLTOWN,IA 50158				
CATHY UNDERHILL	TRUSTEE 0 00	0	0	0
605 WILLOW LANE LEGRAND,IA 50142				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
JESSICA ATCHER3107 FIELDCREST CT MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
KAYLA BLOCKER103 W DAWN ST LEGRAND,IA 50142	NONE		EDUCATIONAL	900
MARY CRANE214 W FERNER ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
KEELY FIENUP906 RATCLIFFE DR MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
SAMANTHA GILL503 E SOUTHRIDGE RD MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
SHELBY HEINRICHS201 W FERNER ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
SUSAN JOHNSON105 LINCOLN VALLEY DR STATE CENTER,IA 50247	NONE		EDUCATIONAL	900
DANIEL REES110 TAFT ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
NORMA DORADO ROBLES913 S 9TH AVE MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
DENNIS TUCKER1703 EDGEBROOK DR MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
DANIELLE ALEXANDER2179 290TH STREET MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
MICHELLE ADAMS608 W BOONE ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
ANA ROSA ALONSO107 N 2ND AVE MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
GRANT AWES407 THUNDERBIRD MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
MARISOL AGUERO1011 S CENTER ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
Total  3a				94,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ANNA BACKES1501 BRENTWOOD TERR MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
CARRIE BELL1002 HENRY DR MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
RYAN BAKER3105 S 14 ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
JUSTIN BREJA1951 HART AVE STATE CENTER,IA 50247	NONE		EDUCATIONAL	900
DANIEL BROUWER701 NEWCASTLE RD MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
TANISHA DUTCHER507 LEE ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
PATRICK DETERMAN2849 NEWBY AVE HAVERHILL,IA 50120	NONE		EDUCATIONAL	900
JAMIE DOLEZAL206 E CHURCH ST GILMAN,IA 50106	NONE		EDUCATIONAL	900
ROBERTS FOUTS108 3RD ST SE STATE CENTER,IA 50247	NONE		EDUCATIONAL	900
AARON FRELAND401 THUNDERBIRD DR MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
MORGAN HILL306 SUNSET LANE MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
REBECCA HEDUM4318 MARICOPA DR 5 AMES,IA 50014	NONE		EDUCATIONAL	900
BENJAMIN KNUTSON505 GREENBRIER LANE MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	1,800
NICK LACINA1911 S 5TH AVE MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
JUSTIN LAMB403 TERRY TERRACE MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
Total  3a				94,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ANDREW LANE1822 WIESE GARDEN RD MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
EMILY MORGAN1510 235TH ST STATE CENTER,IA 50247	NONE		EDUCATIONAL	900
MEGAN PIXLER1323 GREENFIELD DR MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
RYAN RICE3061 PARKER AVE LAUREL,IA 50141	NONE		EDUCATIONAL	900
SECILY SHERMAN4 N 25TH ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
ALEXA TRIPLETT1903 EDGEBROOK DR MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
DANIEL WICKHAM2704 LINCOLN WAY MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
ANNA BEYE2111 LAFAYETTE AVE MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
BAILEY BARRY1539 239TH ST STATE CENTER,IA 50247	NONE		EDUCATIONAL	900
LUKE BYERLY207 2ND AVE SW STATE CENTER,IA 50247	NONE		EDUCATIONAL	900
MATTHEW HARRIS822 NEWTON RD IOWA CITY,IA 52246	NONE		EDUCATIONAL	900
MICHAEL HARRIS527 N 2ND ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
CRISTAL GALLARDO1605 S 2ND AVE MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
SILVIA HERNANDEZ1402 S 1ST STREET MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
EMILY LARKIN514 1/2 S DODGE ST IOWA CITY,IA 52240	NONE		EDUCATIONAL	900
Total  3a				94,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ALYSSA MATHEWS407 N 15TH ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
TAYLOR SMITH215 PINE MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
ZACHARY STAHLIN1721 COUNTRY CLUB PL MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
WENDY TAN2125 A THREE BRIDGES RD MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
ASHLEY THOMPSON500 BEL AIRE DR MARSHALLTOWN,MN 50158	NONE		EDUCATIONAL	900
MATTHEW BEYE2111 LAFAYETTE AVE MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
JOEL CONRAD2343 165TH STREET MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
MICHAEL CAHILL202 N 1ST STREET MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
KELSEY MEYER-DAVIS2012 S 3RD AVE MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
ABBY DUNHAM305 N 9TH STREET MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
DANIELLE EBERLINE1318 W MAIN ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
ANDREW HOLLAND2708 NELSON RD MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
AMBER ILLUM2208 255TH STREET HAVERHILL,IA 50120	NONE		EDUCATIONAL	900
TAYLOR JOHNSON2369 ZELLER AVE MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
SARA JOHNSON124 G STREET CEDAR FALLS,IA 50613	NONE		EDUCATIONAL	900
Total  3a				94,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
NICK LEWARNE1803 S 6TH STREET MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
SHAWNA PFANTZ1938 DURHAM AVE STATE CENTER,IA 50247	NONE		EDUCATIONAL	900
KATHRYN PINS1215 ROLLING MEADOWS RD MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
ERIN RICKEN2432 PARKER AVE MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
COURTNEY SIMONS1410 BRENTWOOD TERR MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
MARK STUBBS614 WESTWOOD DR MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
HAYLEE TAYLOR802 W JULIAN STREET LEGRAND,IA 50142	NONE		EDUCATIONAL	900
BROOKE TICE1909 S 5TH AVE MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
KEEGAN WILKENING1287 275TH ST GARWIN,IA 50632	NONE		EDUCATIONAL	900
MICHELLE WATSON706 ROBERTS TERR MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
SAVANNAH WILKENING205 3RD AVE NW STATE CENTER,IA 50247	NONE		EDUCATIONAL	900
STACY GALEMA815 ROBERTS TERR MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
JAKE SHIPLEY504 3RD AVE STATE CENTER,IA 50247	NONE		EDUCATIONAL	900
JORDAN JUDKINS1902 GETHMANN LANE MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
JASON OHLFEST3407 MERRIT RD MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
Total  3a				94,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
CHRISTEY SHARPSHAIR1508 SUMMIT ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
JORDAN TAYLOR802 W JULIAN STREET MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
JOSHUA ATCHER3107 FIELDCREST CT MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
TARA OHRT810 COMMONS CR 1041 MOUNT VERNON,IA 52314	NONE		EDUCATIONAL	900
JILLISSA MOLNARI219 LINDEN BLVD PLEASANT HILL,IA 50327	NONE		EDUCATIONAL	900
HANNAH STONEWALL3182 270TH STREET MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
NICK THIMESH705 W SOUTHRIDGE RD HAVERHILL,IA 50120	NONE		EDUCATIONAL	900
GUSTAVO MARTINEZ411 MAY ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
DYLAN NEWBROUGH3137 B AVE MONTOUR,IA 50173	NONE		EDUCATIONAL	900
DRAKE FERCH207 5TH ST NE STATE CENTER,IA 50247			EDUCATIONAL	900
AUSTIN NICHOLS408 1ST AVE N STATE CENTER,IA 50247	NONE		EDUCATIONAL	900
ANTHONY J HEINRICHS201 W FERNER ST CEDAR FALLS,IA 50613	NONE		EDUCATIONAL	900
KELLI STALZER3027 REED AVE LAUREL,IA 50141	NONE		EDUCATIONAL	900
J PAT CAHILL202 N 1ST STREET MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
NOEL COLLINS100 E CLINTON LEGRAND,IA 50142	NONE		EDUCATIONAL	900
Total  3a				94,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
PAGE LUND2316 SHADY OAKS RD MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
JOSEPH MAXWELL4 DENMEAD BLVD MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
ANNIE MROZ1715 S 4TH ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
CAITLYN SHIEK1007 RATCLIFFE DR MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
COLE GREWELL2331 OAK PARK RD MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
KELLY FITZGERALD2304 S 8TH ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
BENJAMIN MADSEN2709 255TH ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
ELLI MATHIS2358 OAK PARK RD MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
HALEY GROTH2384 SAND RD MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
JACOB MROZ1715 S 4TH ST CEDAR RAPIDS,IA 52404	NONE		EDUCATIONAL	900
ANGIE MULLENBACH1115 290TH STREEET GARWIN,IA 50632	NONE		EDUCATIONAL	900
JEFFREY MAXWELL4 DENMEAD BLVD MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
AUSTIN EWALT801 HENRY DR MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	900
ALYSSA MATHEWS407 N 15TH ST MARSHALLTOWN,IA 50158	NONE		REFUND OF SCHOLORSHIP	-600
TRAVIS GAGE3151 290TH STREET GILMAN,IA 50106	NONE		REFUND OF SCHOLORSHIP	-450
Total			3a	94,500

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
RYAN BAKER3105 S 14 ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	450
RYAN RICE3061 PARKER AVE LAUREL,IA 50141	NONE		EDUCATIONAL	450
MARY CRANE214 W FERNER ST MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	450
BEN KNUDSON505 GREENBRIER LANE MARSHALLTOWN,IA 50158	NONE		EDUCATIONAL	600
Total				94,500

TY 2009 Accounting Fees Schedule

Name: PHYLLIS PERRY HULTON EDUCATIONAL TRUST
BOWMAN & MILLER PC
EIN: 42-6526655

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PROFESSIONAL FEES	2,068	0		0

**TY 2009 Investments Corporate
Bonds Schedule**

Name: PHYLLIS PERRY HULTON EDUCATIONAL TRUST
BOWMAN & MILLER PC
EIN: 42-6526655

Name of Bond	End of Year Book Value	End of Year Fair Market Value
SAGEPOINT	24,204	26,275

**TY 2009 Investments Corporate
Stock Schedule**

Name: PHYLLIS PERRY HULTON EDUCATIONAL TRUST
BOWMAN & MILLER PC
EIN: 42-6526655

Name of Stock	End of Year Book Value	End of Year Fair Market Value
SAGEPOINT	1,279,298	1,800,537

TY 2009 Other Expenses Schedule

Name: PHYLLIS PERRY HULTON EDUCATIONAL TRUST
BOWMAN & MILLER PC
EIN: 42-6526655

Description	Revenue and Expenses per Books	Net Invest ment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MEMORIAL CONTRIBUTION	50	0		0

TY 2009 Taxes Schedule

Name: PHYLLIS PERRY HULTON EDUCATIONAL TRUST
BOWMAN & MILLER PC

EIN: 42-6526655

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PRIVATE FOUNDATION TAX EXPENSE	1,243	0		0