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Form **990-PF**

Department of the Treasury

SCANNED MAR 3 0 2011

Return of Private Foundation

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

OMB No 1545-0052 2009

Intern	al Hev	enue Service NOTE THE TOUTUATION THAY L	be able to use a copy of this	return to satisfy state repor	ung requirements	
For c	aleni	dar year 2009, or tax year beginning DEC	1, 2009	, and ending	NOV 30, 2010	
G C	heck	all that apply Initial return	Initial return of a fo	rmer public charity	Final return	
		Amended return	Address chang	je 🔲 i	Name change	
Hen	the I	Name of foundation			A Employer identification	number
	abel.	TAMES E C DIAME W D	URKE FOUNDAT:		, ,	
	erwis	dia nongra anguanna a			52-1632596	
	print	Number and street (or P O box number if mail is not de		Room/suite	B Telephone number	
	type	100 SOUTHGATE PARKWAY	PO BOX 199		973-538-40	06
	Spec	City or town state and ZIP code	, 10 2011 133	<u> </u>	C If exemption application is p	
Insti	ructio	MORRISTOWN, NJ 07962	_1997		D 1. Foreign organizations	
	book	type of organization X Section 501(c)(3) ex			Foreign organizations me check here and attach co	eting the 85% test,
"–"	_			tion.		
1.50			Other taxable private foundang method X Cash		E If private foundation state	tus was terminated
		rket value of all assets at end of year J Accounting	-	Accrual	under section 507(b)(1)	• •
			her (specify)		F If the foundation is in a	
		13,174,428. (Part I, colum		-	under section 507(b)(1)	4.13
L Pa	irt i	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessanly equal the amounts in column (a))	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(0) Disbursements for charitable purposes
		- "	exhenses her nongs	IIICUIIIE	_	(cash basis only)
		Contributions, gifts, grants, etc , received			N/A	
		Check X if the foundation is not required to attach Sch. B				
	3	Interest on savings and temporary cash investments		400 000		
	4	Dividends and interest from securities	430,890.	430,890.		STATEMENT 1
	5a	Gross rents .			·····	
	b	Net rental income or (loss)				
0	6a	Net gain or (loss) from sale of assets not on line 10		·····		
Š	b	Gross sales price for all assets on line 6a				
Revenue	7	Capital gain net income (from Part IV, line 2)		0.		
Œ	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
		Less Cost of goods sold				
	C	Gross profit or (loss)				
	11	Other income				
	12	Total. Add lines 1 through 11	430,890.	430,890.		
	13	Compensation of officers, directors, trustees, etc	0.	0.		0.
	14	Other employee salaries and wages			-	
	15	Pension plans, employee benefits				
ses	16a	Legal fees				
ě	b	Accounting fees STMT 2	9,000.	3,000.		6,000.
Expen	C			<u></u>		Ī
Ve	17_	Other professional fees		_		
ig:	18	Taxes \STMT 3	8,283.	0.		0.
ist	19	Depreciation and depletion	·			
Ë	504	Depreciation and deposition Cocupanos				
Adr	3	Tyavel, conferences, and meetings				
ē	22	Printing and publications				
e B	23	Other expenses STMT 4	130.	43.		87.
Operating and Administrative	24	Total operating and administrative				
ēra		expenses. Add lines 13 through 23	17,413.	3,043.		6,087.
Q	25	Contributions, gifts, grants paid	469,253.	3,043.		469,253.
	1		407/200			
	26	Total expenses and disbursements.	486,666.	3,043.		475,340.
_	27	Add lines 24 and 25	400,000.	3,043.		4/3,340.
			<55,776.			
	1 .	Excess of revenue over expenses and disbursements	733,110.	427,847.		
	0	Net investment income (if negative, enter -0-)		42/,04/.	NI / A	<u> </u>

Form 990-PF (2009)

LHA For Privacy Act and Paperwork Reduction Act Notice, see the instructions.

` Form 990-PF (2009)

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52-1632596

Page 2

1 Cush - not-interest-bearing 20,950.0 3,622. 3	D		Balance Sheets Attached schedules and amounts in the description	Beginning of year	End of	fyear		
2 Savings and temporary cash investments 3 A Accounts receivable Less allowance for doubtful accounts		arı	column should be for end-of-year amounts only					
A Piedges receivable Less allowance for doubtful accounts S Garita receivable S Garita receiva		1	Cash - non-interest-bearing			3,622.		
Less allowance for doubtful accounts		2	Savings and temporary cash investments	346,033.	307,595.	307,595.		
Pages receivable Lass allowance for Goubful accounts S		3	Accounts receivable			, , , , , , , , , , , , , , , , , , , ,		
S Grants receivable 6 Receivables due from officers, directors, trustees, and other disqualfied persons 7 Covercear place inceivation 8 Receivables due from officers, directors, trustees, and other disqualfied persons 9 Prizand expenses and deferred charges 10 Investments or Sale or use 10 Investments - Us and state powerment obligations 11 Investments - Outporate stock 11 Investments - Corporate stock 12 Investments - Corporate stock 12 Investments - Corporate stock 13 Investments - Corporate stock 14 Investments - Corporate stock 15 Investments - Corporate stock 16 Investments - Corporate stock 17 Investments - Corporate stock 18 Investments - Corporate stock 19 Investments - Corporate stock 19 Investments - Corporate stock 10 Investments - Corporate stock 11 Investments - Corporate stock 12 Investments - Corporate stock 13 Investments - Corporate stock 14 Investments - Corporate stock 15 Cher assets (describe >			Less allowance for doubtful accounts ▶					
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Total residence in the complete developed by a prepared expense and deferred charges Prepared expenses and deferred charges		6	Receivables due from officers, directors, trustees, and other					
Less allowance for doubtful accounts			disqualified persons					
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Propad expenses and deterred charges 102 a revestments - Corporate brook 5 TMT 5 to investments - Corporate brook 5 TMT 5 TMT 5 to investments - Corporate brook 5 TMT			Less allowance for doubtful accounts					
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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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) ▶ 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ▶ 5 O.								
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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 O.	_	31	Total liabilities and net assets/fund balances	4,913,199.	4,857,423.			
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) 2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 O.	Γp	art	Analysis of Changes in Net Assets or Fund B	Balances				
(must agree with end-of-year figure reported on prior year's return) 1 4,913,199. 2 Enter amount from Part I, line 27a 2 <55,776.> 3 Other increases not included in line 2 (itemize) 3 0. 4 Add lines 1, 2, and 3 4 4,857,423. 5 Decreases not included in line 2 (itemize) 5 0.	_							
3 Other increases not included in line 2 (itemize) ► 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ► 5 Oc.	1			30		4 012 100		
3 Other increases not included in line 2 (itemize) ► 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ► 5 Oc.	_	•			· -	4,913,199.		
4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ► 5 0.					_			
5 Decreases not included in line 2 (itemize) 5 0.								
			· · · · · · · · · · · · · · · · · · ·		· -			
The Loral Day accord or thing balanced at one of Mark Blook a might line by Loral Booking (b) line 20				alone (b) to a 60				
Form 990-PF (2009)	<u>b</u>	ı o <u>t</u> a	I net assets or fund balances at end of year (line 4 minus line 5) - Part II, c	oiumn (b), line 30	6			

(a) List and desc 2-story brick w	ribe the kind arehouse, o	d(s) of property sold (e g r common stock, 200 sh	, real estate, s MLC Co)		` P	low ac - Purcl - Dona	iase į i	c) Date a (mo , da		(d) Date sold (mo , day, yr)
a										
b NO	NE				<u> </u>					
<u> </u>			_		ļ					
<u> </u>					<u> </u>					
<u>e </u>					<u> </u>					<u> </u>
(e) Gross sales price		epreciation allowed (or allowable)		t or other basis xpense of sale					in or (loss (f) minus	
a			<u> </u>			.				
)			<u> </u>							
<u> </u>	<u> </u>									
<u> </u>										
Complete only for assets shown	na asin in c	olumn /h) and owned by	the foundation	on 12/31/60	l I		/11	Caino (Ci	ol /b\ aasa	
(i) F M V as of 12/31/69	(i	Adjusted basis as of 12/31/69	(k) Ex	cess of col (i)				(k), but n	of (h) gain ot less tha (from col	n - 0-) ar
	 	-								
<u>' - </u>	<u> </u>	-								
				,						
	<u> </u>									
Capital gain net income or (net c	apıtal loss)	{ If gain, also ente If (loss), enter -C	r in Part I, line)- in Part I, line	7 7	}	2				
Net short-term capital gain or (lo	ss) as defin	ed in sections 1222(5) ai		•						
If gain, also enter in Part I, line 8 If (loss), enter -0- in Part I, line 8					<u>}</u>	3				
Part V Qualification L	maer Se	ection 4940(e) for	r neaucea	Tax on Net	Inv	estn	ient inco	ome		
as the foundation liable for the sec Yes," the foundation does not qua	ılıfy under s	ection 4940(e) Do not c	omplete this pa	rt			·			Yes X
Enter the appropriate amount in	each colum	in for each year, see insti	ructions before	making any entri	ies					(4)
(a) Base period years Calendar year (or tax year beginn	ing in)	(b) Adjusted qualifying dis		Net value of no		rıtable-				(d) bution ratio vided by col (c))
2008			31,070.				3,251			.0840
2007			31,074.				3,534			.0056
2006			01,080.				8,769			.0073
2005			17,796.				6,921			.2486
2004		2,45	1,921.		16	<u>,97</u>	2,945	•		.1444
Total of line 1, column (d)		·						2		.4901
Average distribution ratio for the the foundation has been in existence.	-		on line 2 by 5,	or by the numbe	r ot ye	ars		3		.0980
Enter the net value of noncharita	ble-use ass	ets for 2009 from Part X,	, line 5					4	1	3,259,45
Multiply line 4 by line 3								5		1,299,75
Enter 1% of net investment inco	me (1% of f	Part I, line 27b)						6		4,27
Add lines 5 and 6								7		1,304,03
Enter qualifying distributions fro	m Part XII, I	line 4						8		475,34
If line 8 is equal to or greater tha See the Part VI instructions	n line 7, che	eck the box in Part VI, lin	e 1b, and comp	plete that part usi	ng a 1	% tax	rate			
3521 02-02-10										Form 990-PF (2

JAMES E. & DIANE W. BURKE FOUNDATION INC Form 990-PF (2009) C/O PORZIO BROMBERG AND NEWMAN PC 52-1632596 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 (attach copy of letter if necessary-see instructions) Date of ruling or determination letter 8,557. b Domestic foundations that meet the section 4940(e) requirements in Part V, check here Lul and enter 1% 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-) 3 4 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 8,000. a 2009 estimated tax payments and 2008 overpayment credited to 2009 6b b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8868) 6c d Backup withholding erroneously withheld 6d 8,000. 7 Total credits and payments Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here _____ if Form 2220 is attached 8 557. 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 11 Enter the amount of line 10 to be Credited to 2010 estimated tax Refunded > 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 X any political campaign? 1a X b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 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 0 • (2) On foundation managers ▶ \$ (1) On the foundation > \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers > \$ 0. X 2 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. 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 X 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5 If "Yes," attach the statement required by General Instruction T. 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either By language in the governing instrument, or

By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law

b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)

year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar

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Х

X

Х

6

7

8b

10

NJ

remain in the governing instrument?

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

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

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

JAMES E. & DIANE W. BURKE FOUNDATION INC

Form 990-PF (2009) Page 5 C/O PORZIO BROMBERG AND NEWMAN PC 52-1632596 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 X section 512(b)(13)? If "Yes." attach schedule (see instructions) 11 12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008? 12 X 13 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A Telephone no > 973 - 538 - 400614 The books are in care of ▶ PORZIO BROMBERG AND NEWMAN PC ZIP+4 > 07962 - 1997Located at ▶ 100 SOUTHGATE PKWY, PO BOX 1997, MORRISTOWN, NJ 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here N/A and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 Part VII-B | Statements Regarding Activities for Which Form 4720 May Be Required Yes No File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly) Yes X No (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) Yes X No 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? (5) Transfer any income or assets to a disqualified person (or make any of either available 🗌 Yes 🗓 No for the benefit or use of a disqualified person)? (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 Yes X No termination of government service, if terminating within 90 days) b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations N/A section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? 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 corrected X before the first day of the tax year beginning in 2009? 1c 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 Yes X No before 2009? If "Yes," list the years b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach N/A 2b statement - see instructions) 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 Yes X No during the year? 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, N/A

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X

X

3b

4a

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

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

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

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

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

Page 7

Total number of others receiving over \$50,000 for professional services 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 1 N/A 2 2 3 4 4 Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on tines 1 and 2. Amount 1 N/A 2 4 4 6 6 6 7 6 7 7 8 8 8 8 8 9 8 9 9 9 9 9 9 9 9 9 9 9	Part VIII Information About Officers, Directors, Trustees, Foundation Managers, H Paid Employees, and Contractors (continued)	lighly	
(a) Name and address of each person pard more than \$50,000 N/A 0. 1 O . Total number of others receiving over \$50,000 for professional services Part IX-A; Summary of Direct Charitable Activities List the foundation's four largest functionals activities List the foundation's four largest function and other beneficianes served, conferences convened, research papers produced, etc 1 N/A 1 N/A Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2. Amount 1 N/A 0 . Amount All other program-related investments See instructions 3 N/A O .	3 Five highest-paid independent contractors for professional services. If none, enter "NONE."		
Total number of others receiving over \$50,000 for professional services Total number of others receiving over \$50,000 for professional services		of service	(c) Compensation
Total number of others receiving over \$50,000 for professional services 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 1 N/A 2 2 3 4 4 Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on tines 1 and 2. Amount 1 N/A 2 4 4 6 6 6 7 6 7 7 8 8 8 8 8 9 8 9 9 9 9 9 9 9 9 9 9 9	N/A		
Total number of others receiving over \$50,000 for professional services 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 1 N / A 2 Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2. Amount 1 N / A All other program-related investments See instructions 3 N / A Q .			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 beneficianes served, conferences convened, research papers produced, etc 1 N/A 0 . 2 Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2. Amount 1 N/A 0 . 4 Amount All other program-related investments See instructions 3 N/A 0 .			
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Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2. Amount N/A O. All other program-related investments See instructions 3 N/A O.	List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as t	he	Expenses
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2. Amount N/A O. All other program-related investments See instructions 3 N/A O.			· · · · · · · · · · · · · · · · · · ·
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All other program-related investments See instructions N/A			Amount
All other program-related investments See instructions N/A	1 N/A		
All other program-related investments See instructions N/A			•
All other program-related investments. See instructions 3 N/A			0.
3 <u>N/A</u> 0.	2		
3 <u>N/A</u> 0.			
0.	All other program-related investments See instructions		
	3 N/A		
			0.
	Total. Add lines 1 through 3	>	Ö.

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes 12,878,711. a Average monthly fair market value of securities 1a 582,669. b Average of monthly cash balances 1b Fair market value of all other assets 10 13,461,380.Total (add lines 1a, b, and c) 1d Reduction claimed for blockage or other factors reported on lines 1a and 0. 1c (attach detailed explanation) Acquisition indebtedness applicable to line 1 assets 13,461,380. 3 3 Subtract line 2 from line 1d 201,921. Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 13,259,459. 5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 662,973. Minimum investment return. Enter 5% of line 5 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) 662,973. Minimum investment return from Part X, line 6 8,557. Tax on investment income for 2009 from Part VI, line 5 2a Income tax for 2009 (This does not include the tax from Part VI) 8,557. 2c C Add lines 2a and 2b Distributable amount before adjustments Subtract line 2c from line 1 3 Recoveries of amounts treated as qualifying distributions 4 654,416 5 Add lines 3 and 4 6 Deduction from distributable amount (see instructions) 654,416 7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes 475,340. a Expenses, contributions, gifts, etc - total from Part I, column (d), line 26 1a 1b Program-related investments - total from Part IX-B 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes Amounts set aside for specific charitable projects that satisfy the За Suitability test (prior IRS approval required) Cash distribution test (attach the required schedule) 3ь 475,340. 4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 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 Adjusted qualifying distributions. Subtract line 5 from line 4 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

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4940(e) reduction of tax in those years

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				654,416.
2 Undistributed income, if any, as of the end of 2009	" " " " " " " " " " " " " " " " " " " "	, , , , , , , , , , , , , , , , , , ,		
a Enter amount for 2008 only			0.	
ь Total for prior years		,		
,,		0.	,	
3 Excess distributions carryover, if any, to 2009				
a From 2004 1,609,836.				
b From 2005 2,817,156.				
c From 2006				
d From 2007				
e From 2008 425,368.				
f Total of lines 3a through e	4,852,360.			
4 Qualifying distributions for 2009 from				
Part XII, line 4 \triangleright \$ 475, 340.				
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				475,340.
e Remaining amount distributed out of corpus	0.			
Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	179,076.			179,076.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	4,673,284.			
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	1,430,760.			
9 Excess distributions carryover to 2010.				
Subtract lines 7 and 8 from line 6a	3,242,524.			
10 Analysis of line 9				
a Excess from 2005 2,817,156.				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008 425, 368.				
e Excess from 2009		<u> </u>		5 000 DE (0000)

2009.05050 JAMES E. & DIANE W. BURKE F BURKEFD2

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3 Grants and Contributions Paid During the Ye	ear or Approved for Future	Payment	1	
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
	or substantial contributor	recipient		
a Paid during the year NATIONAL UNDERGROUND RAILROAD FREEDOM FUND		PC	GENERAL SUPPORT	20,000.
PRINCETON DAY SCHOOL		PC	GENERAL SUPPORT	199,253.
PRINCETON UNIVERSITY ART MUSEUM		PC	GENERAL SUPPORT	250,000.
Total	·		▶ 3a	469,253.
b Approved for future payment				
NONE			:	
Total			▶ 3b	orm 990-PF (2009)

Part XVI-A	Analy	sis of	Income-	-Producing	Activities
* *** * * * * * * * * * * * * * * * *	711013	313 01	III COIII C	-i i oddonig	WORLINGS

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Enter gross amounts unless otherwise indicated	Unrelated	business income		ded by section 512, 513, or 514	(e)	
1 Program service revenue	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	Related or exempt function income	
	Code					
a	 -		1			
U			+ +			
d			+ +		.	
0			 			
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	430,890.		
5 Net rental income or (loss) from real estate						
a Debt-financed property						
b Not debt-financed property					<u> </u>	
6 Net rental income or (loss) from personal property		•			-	
7 Other investment income	ļ					
8 Gain or (loss) from sales of assets other than inventory						
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue						
a						
b				<u></u>		
c	1					
d						
e						
12 Subtotal Add columns (b), (d), and (e)		().	430,890.	0.	
13 Total. Add line 12, columns (b), (d), and (e)		-		13	400 000	
(See worksheet in line 13 instructions to verify calculations)						

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No.	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes)

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orm 990-PI	(2009) C/O P	ORZIO BROMBERG	AND NEWMAN PO	5	2-1632596	Pa	ge 13
Part XV	Information Re Exempt Organ	garding Transfers To izations	and Transactions a	nd Relationships With	Noncharitable		
1 Did the	organization directly or indir	ectly engage in any of the followi	ng with any other organization	described in section 501(c) of	Y	'es	No
	• •	(3) organizations) or in section 5	•	zations?			
	· · · · · · · · · · · · · · · · · · ·	ition to a noncharitable exempt or	rganization of				
(1) Ca					. 1a(1)		<u>X</u>
	her assets			• •	. 1a(2)		X
	ransactions iles of assets to a noncharital	hle everent erganization			1b(1)	1	X
, ,		ncharitable exempt organization			1b(2)		X
	ental of facilities, equipment, (• •			1b(3)		X
	eimbursement arrangements				1b(4)		X
(5) Lo	ans or loan guarantees				1b(5)		X
		mbership or fundraising solicitation			1b(6)		X
		iling lists, other assets, or paid en "Yes," complete the following sch			10		X
		oundation If the foundation received other assets, or services received (c) Name of noncharitable		(d) Description of transfers, tran		ngeme	nts
		N/A					
					 		
				-			
			· · ·				
	-						
							
0- 1-45-4							
	·	tly affiliated with, or related to, one r than section 501(c)(3)) or in sec		ations described		□ ▼] N
	," complete the following sch			••	Yes		J 146
	(a) Name of org		(b) Type of organization	(c) Description	of relationship		
	N/A						
		·					
	· · · · · · · · · · · · · · · · · ·				<u> </u>		
-							
Linder ne	enalties of penury. I declare that I h	ave examined this return, including acc	omnanying schedules and stateme	ents, and to the best of my knowledge:	and helief it is true correct		
		er than taxpayer or fiduciary) is based or				•	
	1 Siane	V. Durke	13/18/11	▼ TRUSTEE			
Sig	nature of officer or trustee		Date	Title			
Ĕ	Preparer's	20-10.	26 /: D	ate Check if	Preparer's identifyii	ng nur	ıber
를 ^수 등	signature PHIL	200 Al Andran	79/11	self- employed > [P013806	24	
Paid Preparer's Use Only	Firm's name (or yours PORZ				2-2005150		
- ag		SOUTHGATE PKWY,					
	address, and ZIP code MORR	ISTOWN, NJ 0796	52-1997	Phone no	973-538-4		
					Form 990-	PF /	200

FORM 990-PF DIVIDEND	S AND	INTER	EST FROM	SECUP	RITIES	STATEMENT	1
SOURCE		GROSS	AMOUNT		TAL GAINS	COLUMN (A) AMOUNT)
UBS FINANCIAL SERVICES	,		430,890.		0.	430,89	90.
TOTAL TO FM 990-PF, PART I, I	N 4		430,890.		0.	430,89	90.
FORM 990-PF	AC	COUNTI	NG FEES			STATEMENT	2
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INV MENT IN	EST-	(C) ADJUSTED NET INCOM		
PORZIO, BROMBERG & NEWMAN, P.C.		9,000.	3	,000.		6,00	00.
TO FORM 990-PF, PG 1, LN 16B	··	9,000.	3	,000.		6,00	00.
FORM 990-PF		TAX	ES	<u></u>		STATEMENT	3
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INV MENT IN	EST-	(C) ADJUSTED NET INCOM		
UNITED STATES TREASURY EXCISE TAXES		8,283.		0.			0.
TO FORM 990-PF, PG 1, LN 18		8,283.		0.			0.
FORM 990-PF	0	THER E	XPENSES	.		STATEMENT	4
DESCRIPTION	EXPE	A) INSES BOOKS	(B) NET INV MENT IN	EST-	(C) ADJUSTED NET INCOM		
UBS FEES NJ DIV OF CONSUMER AFFAIRS STATE OF NJ ANNUAL REPORT		75. 30. 25.		25. 10. 8.		2	50. 20. 17.
TO FORM 990-PF, PG 1, LN 23		130.		43.			87.

FORM 990-PF CORPORATE STOC	CORPORATE STOCK			
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
208,988 SHS JOHNSON & JOHNSON COM STK	4,546,206.	12,863,211.		
TOTAL TO FORM 990-PF, PART II, LINE 10B	4,546,206.	12,863,211.		