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BOARRED OCT & 6 20C

Return of Private Foundation

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

OMB No 1545-0052

		t of the Treasury venue Service Note. Th	ne foundatio	-	reated as a Priva be able to use a copy of this			rting req	uıremei	nts.		UU	9
	_	dar year 2009, or tax year begin		DEC		, and e	 -	NOV		2010			
G	heck		return ded return		Initial return of a	•	charity	Name cl		Fınal return			
ı	the abel erwi		MILY	FOU	NDATION		.		·	entification	number		
	print r type				livered to street address)		Room/suite	B Telep		umber 42-11	1 4		
	Speruction	cific City or town, state, and ZIP	code			·	l <u></u>	C If exer	nption ap	oplication is pe	ending, check		
H C	_	type of organization: X S	ection 501(c) <u>(3)</u> ex	empt private foundation			2. Fo	reign org eck here	anizations med and attach cor	eting the 85% nputation	test,	▶ □
(fr	ır ma	ction 4947(a)(1) nonexempt chai irket value of all assets at end of y Part II, col (c), line 16)	year J A	ccountii Ot	Other taxable private founding method: X Cash her (specify)	Acci	ual	unde F If the	r sectio founda	indation stat in 507(b)(1) ation is in a 6 in 507(b)(1)	(A), check h 60-month te	iere I rminati	
_	rt I		nses (c), and (d) m		(a) Revenue and expenses per books	(b) Net in	vestment ome		Adjust incon	ed net	(d) Dis	burseme	oses
	1 2 3	Contributions, gifts, grants, etc., Check X If the foundation is not re Interest on savings and temporary cash investments		Sch B					N/A	_			
	4 5a	Dividends and interest from second Gross rents	urities		24,338.	2	4,338.		_		STATE	MEN	<u>r 1</u>
ē	_ `	Net rental income or (loss) Net gain or (loss) from sale of assets in Gross sales price for all	not on line 10		<47,885.	.>							
Revenue	7	assets on line 6a Capital gain net income (from Part IV,	line 2)	2.			0.			RECE	VED	70	
	8 9 10a	Net short-term capital gain Income modifications Gross sales less returns and allowances							<u> </u>	OCT 2	9 2011	38086	
	C	Less Cost of goods sold Gross profit or (loss)	·							OGDE	N, UT		
	11 12	Other income Total, Add lines 1 through 11			<23,547.	> 2	4,338.						
	13 14	Compensation of officers, directors, tr Other employee salaries and wa	ges		0.		0.	-			-		0.
enses	16a	Pension plans, employee benefi Legal fees Accounting fees	STMT	2	1,394.		0.						0.
tive Exp	17	Other professional fees Interest			120								
Operating and Administrative Expenses	18 19 20	Taxes Depreciation and depletion Occupancy	STMT	3	408.		0.						0.
and Ac	21	Travel, conferences, and meetin Printing and publications	gs STMT	4	197.		197.						0.
serating	23 24	Other expenses Total operating and administra expenses Add lines 13 through	tive	3	1,999.		197.						0.
ŏ		Contributions, gifts, grants paid Total expenses and disbursem			35,757	,							757.
_	27	Add lines 24 and 25 Subtract line 26 from line 12:			37,756		<u> 197.</u>	-				<u>35, '</u>	<u>757.</u>
	b	Excess of revenue over expenses and Net investment income (if negative, Adjusted net income (if negative,	ve, enter -0-)	ts	<61,303		4,141.	,	N/A				
9235 02-0	01 2-10	LHA For Privacy Act and Pa		duction	Act Notice, see the instru	ctions.			, _	11	Form 99	0-PF	(2009)

P	art	Balance Sheets Attached schedules and amounts in the description Column should be for end-of-year amounts only	Beginning of year	End of y	
=	_		(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	256 442	247 720	247 720
	1	Savings and temporary cash investments	256,442.	247,730.	247,730.
	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		-	
Assets	8	Inventories for sale or use			
Ass	100	Prepaid expenses and deferred charges Investments - U.S. and state government obligations			
	ı	Investments - corporate stock STMT 5	174,302.	174,302.	308,912.
	1	Investments - corporate bonds	1/4,302.	1/4,302.	300,314.
	l	Investments - land, buildings, and equipment basis		· ·	
	''	Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other STMT 6	130,634.	82,043.	82,043.
	14	Land, buildings, and equipment: basis	130,0310	02,043.	02/0151
		Less accumulated depreciation			
	15	Other assets (describe ► STATEMENT 7)	4,000.	0.	0.
					·
	16	Total assets (to be completed by all filers)	565,378.	504,075.	638,685.
		Accounts payable and accrued expenses			
	18	Grants payable			
S	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
jab	21	Mortgages and other notes payable			
_	22	Other liabilities (describe)			
_	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here			
Ø		and complete lines 24 through 26 and lines 30 and 31.			
nces	1	Unrestricted			
ala	25	Temporarily restricted			
9	26	Permanently restricted			
Net Assets or Fund Balan		Foundations that do not follow SFAS 117, check here			
<u></u>	27	and complete lines 27 through 31.	0.	0.	
ets	27 28	Capital stock, trust principal, or current funds Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
Ass	29	Retained earnings, accumulated income, endowment, or other funds	565,378.	504,075.	
et /	30	Total net assets or fund balances	565,378.	504,075.	
Z		Total lict assess of fully balances	30373737		
	31	Total liabilities and net assets/fund balances	565,378.	504,075.	
					
	art	III Analysis of Changes in Net Assets of Fund Bu			
		l net assets or fund balances at beginning of year - Part II, column (a), line 3	0		
		st agree with end-of-year figure reported on prior year's return)		1	565,378.
		r amount from Part I, line 27a		2	<u><61,303.</u> >
		r increases not included in line 2 (itemize)		3	0.
		lines 1, 2, and 3		4	504,075.
		eases not included in line 2 (itemize)			0.
<u>6</u>	Tota	I net assets or fund balances at end of year (line 4 minus line 5) - Part II, col	umn (b), line 30	6	504,075. Form 990-PF (2009)
					rorm 330-PF (2009)

62-1664345

Page 2

THE ORTALE FAMILY FOUNDATION

Form 990-PF (2009)

	ORTALE FAMILY					6	<u> 2-166</u>	4345	Page 3
	and Losses for Tax or tibe the kind(s) of property sold		rincome	(b) Ho	w acquired Purchase	(c) Date	acquired	(d) Dat	e sold
	rehouse; or common stock, 200			Ъ-I	Purchase Donation		day, yr.)	(mo., d	
1a FROM K-1: SEWAN		II, LP		<u> </u>	P	07/1	1/06	12/3	1/09
b CAPITAL GAINS I	DIVIDENDS		_ .		_				
d d			· -	 -					
e			-					·	
(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis				Gain or (loss is (f) minus		
a			47,88	7.					,887.
b 2.						<u> </u>			2.
C									
d									
<u>e</u>									
Complete only for assets showing							Col. (h) gaın not less tha		
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (1) col. (j), if any		00	Losses	(from col. ((h))	
2								-47	,887.
<u>b</u>				-					2.
C								_	
<u>d</u>									
e									
		enter in Part I, line		J				4.5	005
Capital gain net income or (net cap	ortal loss) \(\big \) If (loss), enter	er -0- ın Part I, lıne	7	J 	2		.,,	<47	<u>,885.</u>
3 Net short-term capital gain or (loss		5) and (6):							
If gain, also enter in Part I, line 8, (If (loss), enter -0- in Part I, line 8	column (c).				3		N/A		
Part V Qualification U	nder Section 4940(e)	for Reduced	Tax on Net	Inve	stment In	come			
(For optional use by domestic private	foundations subject to the sect	tion 4940(a) tax on	net investment in	come.)					
If section 4940(d)(2) applies, leave th	ie nart blank								
Was the foundation liable for the sect			•	rıod?				Yes	X No
If "Yes," the foundation does not quali 1 Enter the appropriate amount in e									
(a) Base period years	(b)		making any ones	(c)				(d)	
Base periód years <u>Calenda</u> r year (or tax year beginnin	1	g distributions	Net value of no		able-use assets	;	Distrii (col. (b) di	bution ratio vided by col.	(c))
2008		42,400.			609,754				69536
2007		13,075.			665,13				19658
2006		23,814.			731,180				<u>32569</u>
2005		18,571.			726,11				25576
2004		14,344.	<u> </u>		713,17	3.		. 0	<u> 20113</u>
O Total of two 4 column (d)						_	1	1	67452
2 Total of line 1, column (d)3 Average distribution ratio for the 5	i-vear hase neriod - divide the t	otal on line 2 by 5	or by the number	of vear	c	2	+	• 4	07432
the foundation has been in existen	•	otal off file 2 by 5,	or by the number	or year	3	3		. 0	33490
the realitation has been in existen	ioo ii looo war o youro						 		
4 Enter the net value of noncharitable	le-use assets for 2009 from Pai	rt X, line 5				4		620	,558.
						-			
5 Multiply line 4 by line 3						5	<u> </u>	20	<u>,782.</u>
									0.41
6 Enter 1% of net investment incom	e (1% of Part I, line 27b)					6	 		241.
7 Add lines Cond C						7		21	,023.
7 Add lines 5 and 6						-	 	<u> </u>	<u>, , , , , , , , , , , , , , , , , , , </u>
8 Enter qualifying distributions from	Part XII. line 4					8		35	,757.
If line 8 is equal to or greater than		, line 1b. and comr	olete that part usin	ng a 1%	tax rate.				
See the Part VI instructions.			F. 21. 4. 2.						
923521 02-02-10							F	orm 990-	PF (2009)

	1990-PF (2009) THE ORTALE FAMILY FOUNDATION				<u> 1664</u>			2age 4
_	rt VI Excise Tax Based on Investment Income (Section 4940)	$\overline{}$		1948	- see ii	<u>ıstru</u>	ctior	<u>1s)</u>
1a	Exempt operating foundations described in section 4940(d)(2), check here and ente	er "N/A	Non line 1.		i			
	Date of ruling or determination letter: (attach copy of letter if neces	sary-	see instructions)					
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here	X	and enter 1%	1			2	<u>41.</u>
	of Part I, line 27b							
C	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of	f Part	I, line 12, col. (b)					
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Othe			2				0.
	Add lines 1 and 2		,	3			2	41.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Other	ers en	nter -0-)	4				0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		,	5			2	41.
	Credits/Payments:							
	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	200	.	•			
	Exempt foreign organizations - tax withheld at source	6b		1				
	Tax paid with application for extension of time to file (Form 8868)	6c	380	1]			
	Backup withholding erroneously withheld	6d	300	4				
	Total credits and payments. Add lines 6a through 6d	Vu_	<u> </u>	7	1		5	80.
	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attaching	od		8	 			00.
		eu	_	-	 			
	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			9			2	39.
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		339 Refunded	10				
	Enter the amount of line 10 to be: Credited to 2010 estimated tax ▶ rt VII-A Statements Regarding Activities		339 • Ketunded	11	<u> </u>			0.
			- d.d.d.a		-	1	Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislat	ion oi	r did it participate or interven	e in		4.	163	
	any political campaign?					1a		X
D	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes					1b		<u> </u>
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and of	copie	s of any materials publish	ed or				
	distributed by the foundation in connection with the activities.							
	Did the foundation file Form 1120-POL for this year?					1c		_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.			_				
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure	re tax	imposed on foundation					
	managers. ► \$ 0 .				,			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS	?				2		<u>X</u>
	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 ins	trume	ent, articles of incorporation,	or				
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes					3		<u>X</u>
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	1				4a		<u>X</u>
b	If "Yes," has it filed a tax return on Form 990-T for this year?			N	I/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?					5		<u>X</u>
	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	er:						
	By language in the governing instrument, or							
	• By state legislation that effectively amends the governing instrument so that no mandatory of	directi	ons that conflict with the sta	te law				
	remain in the governing instrument?					6	_X	
7	Did the foundation have at least \$5,000 in assets at any time during the year?					7	X	
	If "Yes," complete Part II, col (c), and Part XV.							
8a	Enter the states to which the foundation reports or with which it is registered (see instructions	(i) \						
	TN							
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Atto	rney	General (or designate)					
	of each state as required by General Instruction G? If "No," attach explanation					8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of secti	on 49	942(j)(3) or 4942(j)(5) for ca	endar				
	year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," cor					9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule					10		X
					Fori	n 990	-PF	2009)

Part VII-8 Statements Regarding Activities (continued)	orm	990-PF (2009) THE ORTALE FAMILY FOUNDATION 62-1	664345		Page 5
section \$12(b)(13)? If Yes, attach schedule (see instructions) 10 dit be foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2003? 10 dits to foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2003? 11 The books are in case \$\frac{1}{2}\$ \$\frac{1}{2}\$	Pa	rt VII-A Statements Regarding Activities (continued)			
12 Det the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 20087	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
August 17, 20087 3 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A 15 The books are in care of ▶ FLYNN D. DOYLE Located at ▶ 71.35 CHARIOTTE PIKE SUTTE 200, NASHVILLE, TN 27.14 ▶ 37.209 15 Section 4947(a)(1) nonexempt charitable trusts fitting form 990.9° in lise 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. 1 During the year duth the foundation (letthe directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise seated or deret to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Peav 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 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 argued to make a girant to or to employ the official for a period after termisation of government service, if terminating within 90 days. 1 If any answer is "Yes" to 14(1)-(5), did any of the acts fail to qualify under the exceptions described in Regulations section \$3.4941(a)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? 2 Taxes on failure to distribute in come (section 942) (does not apply for years the foundation was a private operating foundation defined in section 4942(b)(3) or 4942(b)		section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		<u> </u>
13 Mothe foundation comply with the public inspection requirements for its annual returns and exemption application? 13 X Website address N/A	12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before			
Webste address ► N/A If The books are in care of ► FLYNN D. DOYLE Telephone no. ► 615-942-1112 Located at ➤ 7135 CHARLOTTE PIKE SUITE 200, NASHVILLE, TN ZIP+4 ► 37209 15 Section 4947(a)(1) nonexempt charlable trusts fling form 990-PF in leu of Form 1041 · Check here and enter the amount of tax-exempt unlarest received or accured during the year and enter the amount of tax-exempt unlarest received or accured unrough the year and enter the amount of tax-exempt unlarest received or accured unrough the year File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 During they are did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, end money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburss the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person for make any of either available for the benefit or use of adequalitied person for make any of either available for the benefit or use of adequalitied 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 termination of povernment service, it eriminating with 90 days. The foundation appeal of a prior year in any of the acts fail to qualify under the exoptions described in Regulations section 53,494 (14)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Porganizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? Porganizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? Porganizations relying on a current notice regarding disaster assistance of the keep to		August 17, 2008?	12		_X_
14 The books are in case of ► FLYNN D. DOYLE Telephone no. 615-942-1112	13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Located at N 7135 CHARLOTTE PIKE SUTTE 200, NASHVILLE, TN ZIP4 37209 It Section 4947(a)(1) nonexempt charatable trusts fitting 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. In 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualited person? (3) Furnats poods, services, or facilities to (or accept them from) a disqualified person? (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 for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the person of property to a government officiar (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.) If any answer is "Yes" to a(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 5.494(1)-(3) or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding					
15 Section 4947(a)(1) nonexempt chartable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accured during the year and enter the amount of tax-exempt interest received or accured during the year and enter the amount of tax-exempt interest received or accured during the year off the form 4720 ft any item is checked in the "Yee" column, unless an exception applies. File Form 4720 ft any item is checked in the "Yee" column, unless an exception applies. 10 During the year did the foundation (either directly or indirectly): 11 During the year did the foundation (either directly or indirectly): 12 During the year did the foundation to, or otherwise extend credit to (or accept it from) and squalified person? 13 Furnish goods, services, or facilities to (or accept them from) a disqualified person? 14 Pay compensation to, or pay or reimbiruse the expenses of, a disqualified person? 15 Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? 16 Agree to pay money or property to a government official? (Exception, Check "No" if the foundation argered to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) 15 Ilamy answer is "Yes" to 14(1)-(6), did any of the acts flat 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)? 16 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 lax year beginning disaster assistance check here 18 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 lax year beginning of the acts described in 1a, other than excepted acts, that were not corrected bef	14	The books are in care of ▶ FLYNN D. DOYLE Telephone no. ▶ 615	<u>-942-1</u>	<u>112</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		Located at ► 7135 CHARLOTTE PIKE SUITE 200, NASHVILLE, TN ZIP+4	<u> 37209</u>		
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1	15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here			
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); 15			N	/A	
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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (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 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 termination of government service, if terminating within 90 days.) If any answer is 'Yes' to 14(1-6), did any of the acts fail to quality under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? N/A Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)? Taxes on failure to distribute income (section 4942()(does not apply for years the foundation was a private operating foundation defined in section 4942()(3) or 4942()(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,' In the years I be instructions.) 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.) If 'Yes,' I did 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 app	Pa	art VII-B Statements Regarding Activities for Which Form 4720 May Be Required			
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22 Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes X No	1a				
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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 ., , , , , , , , , , , , , , , , , , ,					
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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.) IVA 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.		If "Yes," list the years , , , ,			
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during the year? Description of the Sex of	3a				
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009) N/A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a X b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that			No		
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			<u> </u>		
had not been removed from jeopardy before the first day of the tax year beginning in 2009?		had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		X

4b X Form **990-PF** (2009)

Part VN-B Statements Regarding Activities for Which		Peguired (seeks	62-1664	045	Page 6
	FORTH 4720 Way be I	nequired (contin	Tuea)	 ,	
5a During the year did the foundation pay or incur any amount to:	~ 40.45/a\\0		es X No		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section)	,		S LALINO		
(2) Influence the outcome of any specific public election (see section 4955); any voter registration drive?	or to carry on, unectry or mun		es X No		Ì
(3) Provide a grant to an individual for travel, study, or other similar purposes	• 2		s X No		
(4) Provide a grant to an organization other than a charitable, etc., organization			is Lat NO		
509(a)(1), (2), or (3), or section 4940(d)(2)?	m described in Section		es X No		
(5) Provide for any purpose other than religious, charitable, scientific, literary	or educational nurnoses or		3 LAS 140		
the prevention of cruelty to children or animals?	, or cancational purposes, or		es X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify un	der the excentions described				ļ
section 53.4945 or in a current notice regarding disaster assistance (see instri		in riogalations	N/A	5b	1
Organizations relying on a current notice regarding disaster assistance check	•				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption is		ined			ļ
expenditure responsibility for the grant?			es 🗀 No		-
If "Yes," attach the statement required by Regulations section 53 494		.,			[
6a Did the foundation, during the year, receive any funds, directly or indirectly, to			ļ		
a personal benefit contract?	F=2 Frommanio (ii		es X No	1	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a	nersonal benefit contract?			6ь	x
If "Yes" to 6b, file Form 8870.					— -
7a At any time during the tax year, was the foundation a party to a prohibited tax	shelter transaction?	□ v ₄	es X No		l
b If yes, did the foundation receive any proceeds or have any net income attribu			N/A	7b	
Information Albert Officers Director Tour		nagers. Highly			
Part VIII Paid Employees, and Contractors	•	o , o .	•		
1 List all officers, directors, trustees, foundation managers and their	compensation.				
A Missas and address	(b) Title, and average hours per week devoted	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e)	Expense unt, other
(a) Name and address	to position	(If not paid, enter -0-)	and deferred compensation	allo	wances
BUFORD H. ORTALE	TRUSTEE				
424 SUNNYSIDE DRIVE]				
NASHVILLE, TN 37205	0.00	0.	0	•	0.
CYNTHIA C. ORTALE	TRUSTEE				
424 SUNNYSIDE DRIVE			1		
NASHVILLE, TN 37205	0.00	0.	0	•	0.
]		
			İ	1	
			ļ	}	
		<u> </u>	<u> </u>	1	
2 Compensation of five highest-paid employees (other than those in		enter "NONE."	(d) Contributions to	1	
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	employee benefit plans and deferred compensation	accou	Expense unt, other wances
NONE	devoted to position		compensation		11411000
NONE					
	 			+	
	1		1		
	 	1		†	
	1	}	}		
		<u> </u>		1	
	1				
				<u>L</u>	
Total number of other employees paid over \$50,000					0

Form 990-PF (2009) THE ORTALE FAMILY FOUNDATION		L664345 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundati Paid Employees, and Contractors (continued)	on Managers, Highly	
3 Five highest-paid independent contractors for professional services. 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		<u>▶</u> 0
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistic number of organizations and other beneficiaries served, conferences convened, research papers produi-	al information such as the sed, etc.	Expenses
1 N/A		
2		·
3		
4		
Part IV B Common of Drawow Dalated Investments		
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lir	es 1 and 2	Amount
1 N/A	to Tanu Z.	Amount
		
2		
All other program-related investments. See instructions.		···
3		
Total. Add lines 1 through 3	>	0.

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P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations, se	e instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		<u> </u>
a	Average monthly fair market value of securities	1a	292,403.
b	Average of monthly cash balances	1b	255,563.
C		1c	82,042.
d	Total (add lines 1a, b, and c)	1d	630,008.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	630,008.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	9,450.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	620,558.
6	Minimum investment return. Enter 5% of line 5	6	31,028.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here and do not complete this part.)	nd certain	
1	Minimum investment return from Part X, line 6	1	31,028.
2a	Tax on investment income for 2009 from Part VI, line 5		
b	Income tax for 2009. (This does not include the tax from Part VI.)]]	
C	Add lines 2a and 2b	2c	241.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	30,787.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	30,787.
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	30,787.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	35,757. 0.
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	<u>35,757.</u>
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	<u>241.</u>
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	35,516.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of	qualifies for th	ie 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				30,787.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			5,584.	
b Total for prior years:				
,,		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008	_			
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from				
Part XII, line 4: ► \$ 35, 757.				
a Applied to 2008, but not more than line 2a			5,584.	
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.			20.452
d Applied to 2009 distributable amount				30,173.
e Remaining amount distributed out of corpus	0.			
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:				
& Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
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				614.
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	0.			
9 Excess distributions carryover to 2010.				
Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2005	j			
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009		<u></u>		Form 000 DE (0000)

	ALE FAMILY				664345 Page 10
Part XIV Private Operating F			I-A, question 9)	N/A	
1 a If the foundation has received a ruling o					
foundation, and the ruling is effective fo			▶ └		
b Check box to indicate whether the found		ng foundation described		4942(j)(3) or	4942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
investment return from Part X for					
each year listed					
b 85% of line 2a					
 Qualifying distributions from Part XII, line 4 for each year listed 					-
d Amounts included in line 2c not					
used directly for active conduct of exempt activities					
e Qualifying distributions made directly			 -		
for active conduct of exempt activities.					
Subtract line 2d from line 2c Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter;					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(III)					
(3) Largest amount of support from					
an exempt organization					
(4) Gross investment income					
Part XV Supplementary Info	rmation (Comple	te this part only	if the foundation	n had \$5,000 or i	nore in assets
at any time during t	the year-see the	instructions.)			
1 Information Regarding Foundation	on Managers:	· · · · · · · · · · · · · · · · · · ·			-
List any managers of the foundation wh year (but only if they have contributed r			tributions received by t	he foundation before the (close of any tax
BUFORD H. ORTALE					
b List any managers of the foundation wh			(or an equally large por	tion of the ownership of	a partnership or
other entity) of which the foundation ha	s a 10% or greater intere	ði.			
NONE					·
2 Information Regarding Contribut Check here ► X if the foundation of the foundation makes gifts, grants, etc.	only makes contributions	to preselected charitable	organizations and does		
a The name, address, and telephone num					
b The form in which applications should t	oe submitted and informa	ition and materials they s	hould include:		
c Any submission deadlines:					
d Any restrictions or limitations on award	s, such as by geographic	al areas, charitable fields	, kınds of ınstitutions, o	or other factors:	

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3 Grants and Contributions Paid During the Ye	ar or Approved for Future I	Payment		
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
a Paid during the year				
				l I
SEE STATEMENT 8 Total			▶ 3a	35,757.
b Approved for future payment				337737
NONE				
		1		
				1
	·		3h	0

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

nter gross amounts unless otherwise indicated.	Unrelated	business income		ed by section 512, 513, or 514	(e)
•	(a) Business	(b) Amount	(c) Exclu- sion code	(d) Amount	Related or exempt function income
Program service revenue:	code		code		10/10/10/11/100/110
8			 		
b	-		 		
·			 		
<u> </u>	-		 		
e		 			
g Fees and contracts from government agencies	-		 		
Membership dues and assessments					
Interest on savings and temporary cash					
investments			}		
Dividends and interest from securities		-	14	24,338.	
Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
Net rental income or (loss) from personal	1 - 1		ŀΤ		
property					
Other investment income			$\perp \perp$		
Gain or (loss) from sales of assets other					
than inventory			18	<u><47,885.</u>	>
Net income or (loss) from special events					
Gross profit or (loss) from sales of inventory	-		+		
Other revenue:					
å	-				
b					
<u> </u>			 		
d					<u> </u>
Subtotal. Add columns (b), (d), and (e)	-	0.		<23 5A7	
Total Add line 12, columns (b), (d), and (e)	<u> </u>			13	<23,547
ee worksheet in line 13 instructions to verify calculations.)				.~_	<u> </u>
Explain below how each activity for which inc the foundation's exempt purposes (other that			contribu	ited importantly to the accor	nplishment of
1821 02-10					Form 990-PF (20

Pan	XVII Information Re Exempt Organ	egarding Transfers To and Transactions a izations	nd Relationships With Noncharit			_
1 D	d the organization directly or indi	rectly engage in any of the following with any other organization	n described in section 501(c) of		Yes	No
th	e Code (other than section 501(c))(3) organizations) or in section 527, relating to political organ	izations?			
	, -	ation to a noncharitable exempt organization of:]	ļ	
) Cash		T-	a(1)		X
) Other assets		<u> 1</u>	a(2)		X
	ther transactions:			1		
•) Sales of assets to a noncharita	, ,		b(1)		X
-	Purchases of assets from a no	•		b(2)		X
•	Rental of facilities, equipment,	or other assets		b(3)		X
•) Reimbursement arrangements		_	b(4)		<u>X</u>
) Loans or loan guarantees			b(5)	_	X
	•	mbership or fundraising solicitations	<u> </u>	b(6)		X
		iling lists, other assets, or paid employees "Yes," complete the following schedule. Column (b) should alv		1c	<u></u> l	X
	olumn (d) the value of the goods,	oundation. If the foundation received less than fair market valu other assets, or services received. (c) Name of noncharitable exempt organization	e in any transaction or snaring arrangement, snow (d) Description of transfers, transactions, and sha		angeme	nts
		N/A				
	-					
						
						
	- -					
						
	-					
	-					
	- 					
					-	

2	a is the	foundation directly or indirect	ly affiliated with, or relat	ted to, one or	more tax-exen	npt organı	ızatıons describ	ed		
	IN se	ction 501(c) of the Code (other	than section 501(c)(3)) or in sectior	า 527?				Yes	X No
) If "Ye	s," complete the following sche	edule							
		(a) Name of org	anization	(b) Type of org	anization		(c) Description	of relationship	
		N/A								
		penalties of perjury, I declare that I have							nd belief, it is true, correct	,
	and co	nplete Declaration of preparer (othe	than taxpayer or flouciary)	is dased on all	intormation of with	ion preparer	rilas any knowled	ge .		
		BURING H. O.	NOO		10/17	M	TRUS	STEE		
ere	S	gnature of officer or trustee			Date	1 '	Title			
Sign Here		Preparer's	0 000				Date	Check if	Preparer's identifying	g number
ŝ	Paid Preparer's Use Only	signature 🖊 🔭	RL, UA				10 12\11	employed >	X	
••	Paid pare	Firm's name (or yours FLYN	N D DOYLE,	CPA			•	EIN ▶		
	L e s	rf self-employed), 1135	CHARLOTTE	PIKE,	SUITE	200				
		address, and ZIP code NASH	VILLE, TN	37209				Phone no.	615-942-1	112
			- 		· ·				Form 990-	PF (2009)

SOURCE GROSS AMOUNT DIVIDENDS AMOUNT	FORM 990-PF DIVIDENT	DS AND	INTER	EST FROM	SECUI	RITIES	STATEMENT	1
TROM K-1 SEWANEE PARTNERS III, LP	SOURCE		GROSS	AMOUNT			COLUMN (A AMOUNT)
1,126.		- -		23,212.		0.	23,2	12.
FORM 990-PF ACCOUNTING FEES STATEMENT (A) (B) (C) (D) EXPENSES NET INVEST- PER BOOKS MENT INCOME NET INCOME PURPOS ACCOUNTING FEES 1,394. 0. TO FORM 990-PF, PG 1, LN 16B 1,394. 0. FORM 990-PF TAXES STATEMENT (A) (B) (C) (D) EXPENSES NET INVEST- PER BOOKS MENT INCOME NET INCOME PURPOS TAXES 408. 0. TO FORM 990-PF, PG 1, LN 18 408. 0. TO FORM 990-PF, PG 1, LN 18 408. 0. FORM 990-PF OTHER EXPENSES STATEMENT (A) (B) (C) (D) ADJUSTED CHARITY NET INCOME PURPOS TAXES 408. 0. TO FORM 990-PF, PG 1, LN 18 408. 0. FORM 990-PF OTHER EXPENSES STATEMENT (A) (B) (C) (D) EXPENSES NET INVEST- PER BOOKS MENT INCOME NET INCOME PURPOS DESCRIPTION EXPENSES NET INVEST- PER BOOKS MENT INCOME NET INCOME PURPOS UBS FINANCIAL SERVICES FEE 47. 47. 150. 150.	LP	Ι,		-			1,1	26. 0.
Ca	TOTAL TO FM 990-PF, PART I,	LN 4		24,340.		2.	24,3	38.
EXPENSES PER BOOKS MENT INCOME NET INCOME PURPOSE NOT INCOME PURPOSE NOT INCOME NET INCOME PURPOSE NET INCOME PURPOSE NET INCOME NET INCOME PURPOSE NET INCOME NET INCOME PURPOSE NET INCOME NET INCOME NET INCOME NET INCOME NET INCOME NET INCOME PURPOSE NET INCOME NET INCOME PURPOSE NET INCOME NET INCOME PURPOSE NET INCOME NET INCOME NET INCOME PURPOSE NET INCOME NET INCOME NET INCOME NET INCOME PURPOSE NET INCOME PURPOSE NET INCOME NET INCOME NET INCOME PURPOSE NET INCOME NET INCOME NET INCOME PURPOSE NET INCOME NET INCOME NET INCOME PURPOSE NET INCOME NET INCOME NET INCOME PURPOSE NET INCOME NET INCOME NET INCOME PURPOSE NET INCOME N	FORM 990-PF	AC	COUNTI	NG FEES			STATEMENT	2
TO FORM 990-PF, PG 1, LN 16B 1,394. 0. FORM 990-PF TAXES STATEMENT (A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARITY PER BOOKS MENT INCOME NET INCOME PURPOS TAXES 408. 0. TO FORM 990-PF, PG 1, LN 18 408. 0. FORM 990-PF OTHER EXPENSES STATEMENT (A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARITY PER BOOKS MENT INCOME NET INCOME PURPOS UBS FINANCIAL SERVICES FEE 47. 47. BANK SERVICE CHARGES 150. 150.	DESCRIPTION	EXPE	NSES	NET INV		ADJUSTED	CHARITA	
FORM 990-PF TAXES STATEMENT (A) EXPENSES NET INVEST- ADJUSTED CHARITY PER BOOKS MENT INCOME NET INCOME PURPOS TAXES 408. 0. TO FORM 990-PF, PG 1, LN 18 408. O. FORM 990-PF OTHER EXPENSES STATEMENT (A) EXPENSES NET INVEST- ADJUSTED CHARITY PER BOOKS MENT INCOME EXPENSES NET INVEST- ADJUSTED CHARITY PER BOOKS MENT INCOME PURPOS UBS FINANCIAL SERVICES FEE BANK SERVICE CHARGES 150. 150.	ACCOUNTING FEES		1,394.		0.			0.
(A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARITA CHARITA PER BOOKS MENT INCOME NET INCOME PURPOSE TAXES 408. 0. TO FORM 990-PF, PG 1, LN 18 408. 0. FORM 990-PF OTHER EXPENSES STATEMENT (A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARITA PURPOSE UBS FINANCIAL SERVICES FEE BANK SERVICE CHARGES 47. 47. BANK SERVICE CHARGES 150. 150.	TO FORM 990-PF, PG 1, LN 16B	· · · · · ·	1,394.		0.			0.
DESCRIPTION EXPENSES NET INVEST- ADJUSTED CHARITY PER BOOKS MENT INCOME NET INCOME PURPOS 408. 0. TO FORM 990-PF, PG 1, LN 18 408. 0. TOFORM 990-PF OTHER EXPENSES OTHER EXPENSES OTHER EXPENSES EXPENSES NET INVEST- ADJUSTED CHARITY PER BOOKS MENT INCOME NET INCOME PURPOS UBS FINANCIAL SERVICES FEE 47. BANK SERVICE CHARGES 47. 47. BANK SERVICE CHARGES 150. 150.	FORM 990-PF		TAX	ES			STATEMENT	3
TO FORM 990-PF, PG 1, LN 18 408. O. FORM 990-PF OTHER EXPENSES (A) EXPENSES NET INVEST- ADJUSTED CHARITA PER BOOKS MENT INCOME UBS FINANCIAL SERVICES FEE 47. BANK SERVICE CHARGES 150. 150.	DESCRIPTION	EXPE:	NSES	NET INV		ADJUSTED	CHARITA	
FORM 990-PF OTHER EXPENSES (A) EXPENSES OTHER EXPENSES (B) EXPENSES NET INVEST- ADJUSTED CHARITA PER BOOKS MENT INCOME PURPOS UBS FINANCIAL SERVICES FEE BANK SERVICE CHARGES 150. 150.	TAXES		408.	-	0.			0.
UBS FINANCIAL SERVICES FEE BANK SERVICE CHARGES (A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARITA PER BOOKS MENT INCOME NET INCOME PURPOS 47. 47. 150. 150.	TO FORM 990-PF, PG 1, LN 18		408.		0.			0.
DESCRIPTION DESCRIPTION DESCRIPTION DESCRIPTION PER BOOKS MENT INCOME NET INCOME PURPOS 47. BANK SERVICE CHARGES 150. 150.	FORM 990-PF	0	THER E	XPENSES			STATEMENT	4
BANK SERVICE CHARGES 150.	DESCRIPTION	EXPE	NSES	NET INV	EST-	ADJUSTED	CHARITA	
TO FORM 990-PF, PG 1, LN 23 197. 197.						,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		0.
	TO FORM 990-PF, PG 1, LN 23		197.		197.			0.

FORM 990-PF (CORPORATE STOCK		STATEMENT	5
DESCRIPTION		BOOK VALUE	FAIR MARKET	r
BLACKROCK PFD & EQUITY ADVANTAGE DEUTSCHE BK CONTINGENT CAP TR II		77,103. 97,199.		
TOTAL TO FORM 990-PF, PART II, L	INE 10B	174,302.	308,912	
FORM 990-PF O	THER INVESTMENTS		STATEMENT	6
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKE	r
SEWANEE PARTNERS III, LP	COST	82,043.	82,04	43.
TOTAL TO FORM 990-PF, PART II, L	INE 13	82,043.	82,0	43.
FORM 990-PF	OTHER ASSETS		STATEMENT	7
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKE' VALUE	r
DUE FROM SEWANEE VENTURES LLC	4,000.	0.		0.
TO FORM 990-PF, PART II, LINE 15	4,000.	0.		0.

	AND CONTRIBUTIONS DURING THE YEAR	STATEMENT 8		
RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT		AMOUNT	
ST CECILIA CONGREGATION 801 DOMINICAN DRIVE NASHVILLE, TN 37228		PUBLIC CHARITY	2,000.	
MONTGOMERY BELL ACADEMY 4001 HARDING ROAD NASHVILLE, TN 37205		PUBLIC CHARITY	12,500.	
	NONE GENERAL USE	PUBLIC CHARITY	1,100.	
BELLE MEADE PLANTATION 5025 HARDING PIKE NASHVILLE, TN 37205		PUBLIC CHARITY	5,400.	
SEWANEE UNIVERSITY ANNUAL FUND 735 UNIVERSITY AVENUE SEWANEE, TN 37383		PUBLIC CHARITY	750.	
AMERICAN CANCER SOCIETY 2000 CHARLOTTE PIKE NASHVILLE, TN 37203	NONE GENERAL USE	PUBLIC CHARITY	100.	
CHEEKWOOD BOTANICAL GARDENS 1200 FORREST PARK DRIVE NASHVILLE, TN 37205	NONE GENERAL USE	PUBLIC CHARITY	1,500.	
MISSIONS INTERNATIONAL OF AMERICA 103 WENTWORTH COURT PERRYSBURG, OH 43551	NONE GENERAL USE	PUBLIC CHARITY	100.	

THE ORTALE FAMILY FOUNDATION			62-1664345
ST HENRY CATHOLIC CHURCH 6401 HARDING ROAD NASHVILLE, TN 37205		PUBLIC CHARITY	750.
THE FRIST CENTER 919 BROADWAY NASHVILLE, TN 37203		PUBLIC CHARITY	1,400.
EVERY DREAM HAS A PRICE 2179 10TH AVENUE VERO BEACH, FL 32960		PUBLIC CHARITY	250.
HARDING ACADEMY 170 WINDSOR DRIVE NASHVILLE, TN 37205		PUBLIC CHARITY	2,500.
HANDS AND FEET PROJECT PO BOX 682105 FRANKLIN, TN 37068		PUBLIC CHARITY	250.
MARTHA O'BRYAN CENTER 711 SOUTH SEVENTH STREET NASHVILLE, TN 37206		PUBLIC CHARITY	5,000.
THE BRIDGE MINISTRY PO BOX 463 GOODLETTSVILLE, TN 37070	NONE GENERAL USE	PUBLIC CHARITY	400.
THE KINKAID SCHOOL 201 KINKAID SCHOOL DRIVE HOUSTON , TX 77024	NONE GENERAL USE	PUBLIC CHARITY	255.
TYRONE FORTWORTH NASHVILLE, TN	NONE HOSPICE ASSISTANCE		1,000.
JIM POSTAN NASHVILLE, TN	NONE FLOOD ASSISTANCE		250.

THE ORTALE FAMILY FOUNDATION		(52-1664345
ALS ASSOCIATION PO BOX 40244 NASHVILLE, TN 34	NONE GENERAL USE	PUBLIC CHARITY	252.
TOTAL TO FORM 990-PF, PART XV, L	INE 3A	 	35,757.