

See a Social Security Number? Say Something! Report Privacy Problems to https://public.resource.org/privacy Or call the IRS Identity Theft Hotline at 1-800-908-4490





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Form **990-PF**

• Department of the Treasury

Return of Private Foundation

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

The foundation may be able to use a conv of this return to satisfy state reporting requirements

OMB No 1545-0052

Geneck all that apply: Initial return Initial return Address change Name of foundation AEmployer identification number AEmployer id
Name of foundation THE HALSEY FAMILY FOUNDATION Number and sites (or PO box number if mails not delivered to street address) 149 DUCK HAWK WAY City or town, state, and 2/P code MARTETTA, SC 29661 H Check type of organization: XI Section 501(c)(3) exempt private foundation Section 4947(a)(1) nonexempt charitable trust: Other tracelle private foundation Fair market value of all assets at end of year 1 Fair market value of all assets at end of year 1 Fair market value of all assets at end of year 1 Fair cloud of amountain on columns 6), (c), (c), inn e16) SS 1 10 2 , 055 . (Part 1, column (d) must be on cash bass) Fart I Analysis of Revenue and Expenses (The total of amountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on may not include a mountain noclumns 6), (c), and (on ma
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THE HALSEY FAMILY FOUNDATION Number and street for PO box number of mails and celevered to street address) 149 DUCK HAWK WAY City or lown, state, and ZiP code MARIETTA, SC 29661 H. Check type of organization: Xi Section 501(c)(3) exempt private foundation Section 4947(a)(1) nonexempt charitable trust Other tracele private foundation Fair market value of all assets at end of year I Accounting method: Xi Cash Accrual (from Part II, col. (c), line 16) S 102, 055. (Part I, column (d) must be on cash basis) First I Analysis of Revenue and Expenses 1 Contributions, grifs, grants, etc., received 2 Check Xi I she fields the amounts in column (a) must be on cash basis.) 1 Contributions, grifs, grants, etc., received 2 Check Xi I she fields the amounts in column (a) must be on cash basis.) 1 Contributions grifs, grants, etc., received 2 Check Xi I she fields the amounts in column (a) must be on cash basis.) 1 Contributions grifs, grants, etc., received 2 Check Xi I she fields the amounts in column (a) must be on cash basis.) 1 Contributions grifs, grants, etc., received 2 Check Xi I she fields the amounts in column (a) must be on cash basis.) 1 Contributions grifs, grants, etc., received 2 Check Xi I she fields the amounts in column (a) must be on cash basis.) 1 Contributions grifs, grants, etc., received 2 Check Xi I she fields the amounts in column (a) must be on cash basis.) 1 Contributions grifs, grants, etc., received 2 Check Xi I she fields the amounts in column (a) must be on cash basis.) 1 Contributions grifs, grants, etc., received 2 Check Xi I she field the amounts in column (a) must be on cash basis.) 1 Contributions grifs, grants, etc., received 2 Check Xi I she field the amounts in column (a) must be on cash basis. 1 Contributions grifs, grants, etc., received in column (a) must be on cash basis. 2 Check Xi I she field the amounts in column (a) must be on cash basis. 3 Interest to assist grifs and section for the column (a) must be on cash basis. 4 Divided and interest from
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149 DUCK HAWK WAY
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Part
Contributions, gifts, grants, etc., received Check Chec
Tontributions, gifts, grants, etc., received Conex X the foundation is not required to attach Sch B interest on savings and temporary and interest from securities 1. 1. STATEMENT 1 4. Dividends and interest from securities 1. 722. 1,722. STATEMENT 2 5a Gross rents b Net rental income or (loss) 6a Not gain or (loss) from sale of assets not on line 10 6 Gross sales pince for all assets on line 6a 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain 9 Income modifications 10a and allowances b Less Cost of goods sold c Gross profit or (loss) 11 Other income 12 Total. Add lines 1 through 11 13 Compensation of officers, directors, trustees, etc 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees 5 Accounting fees 5 STMT 3 1, 175. 0. 1, 175 C Other professional fees
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b Accounting fees STMT 3 1,175. 0. 1,175 c Other professional fees 17 Interest
C Other professional fees 17 Interest
9 17 Interest
2 4 7
17 Interest 18 Taxes 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings
19 Depreciation and depletion
E 20 Occupancy
2 2 Printing and publications
150
23 Other expenses STMT 4 150. 150.
23 Other expenses STMT 4 150. 150. 24 Total operating and administrative expenses. Add lines 13 through 23 2 1,325. 2 150. 3 500
24 Total operating and administrative expenses. Add lines 13 through 23 1,325. 150. 1,175 25 Contributions, gifts, grants paid 2,500. 2,500
25 Contributions, griss, grants paid 2, 500.
Add lines 24 and 25 3,825. 150. 3,675
27 Subtract line 26 from line 12:
a Excess of revenue over expenses and disbursements <2,102.>
b Net investment income (if negative enter -0-)
b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A

 (must agree with end-of-year figure reported on prior year's return)
 1

 2 Enter amount from Part I, line 27a
 2

 3 Other increases not included in line 2 (itemize) ►
 3

 4 Add lines 1, 2, and 3
 4

5 Decreases not included in line 2 (itemize) ► MISCELLANEOUS BASIS ADJUSTMENTS
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30

102,883.

Form **990-PF** (2010)

104,987.

102,885.

* (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) H	low ac - Purch - Dona	quired nase tion	(c) Date acq (mo., day,	uired yr.)	(d) Date sold (mo., day, yr.)		
		·								
b NO	NE			·						
c					↓					
<u>d</u>		.			 					
<u>e</u>	r		 		1					
(e) Gross sales price	(f) (Depreciation allowed (or allowable)		st or other basis expense of sale				(h) Gain (e) plus (f)		
a b						<u> </u>				
<u> </u>		·								
d										
e							<u>.</u>			
Complete only for assets shown	ng gain in	column (h) and owned by	the foundation	on 12/31/69				Gains (Col.		
(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			col.	(k), but not l Losses (fro	less than om col. (I	י -0-) or י(ור)
a		-	<u> </u>				···	<u>-</u>		
b										
c										
d										
e										
		∫ If gain, also ente	er in Part I, line	7)					
Capital gain net income or (net ca	apital loss)- ın Part İ, lıne	7	<i>]</i> [2				
Net short-term capital gain or (lo	ss) as defi	ned in sections 1222(5) a	nd (6):							
If gain, also enter in Part I, line 8,			- (-/-] [
If (loss), enter -0- in Part I, line 8 Part V Qualification U		Section 4940(e) for				3				
as the foundation liable for the sec "Yes," the foundation does not qua Enter the appropriate amount in	lify under	section 4940(e). Do not c	omplete this pa	art.			· · ·	· · · ·		Yes X No
(a) Base period years Calendar year (or tax year beginn	ing in)	(b) Adjusted qualifying di	stributions	Net value of n	(c) onchai	ritable-	use assets	(co	Distrib il. (b) div	(d) ution ratio ided by col. (c))
2009			8,934.			11	0,221	•		.08105
2008			8,774.			11	6,993	•		.07499
2007			7,867.			12	1,494	•		.06475
2006			4,495.			12	1,627	•		.03695
2005			<u>850.</u>			<u> 12</u>	<u>2,894</u>	•		.00691
Total of line 1, column (d)								2		.26467
Average distribution ratio for the			on line 2 by 5,	or by the number	er of ye	ears				
the foundation has been in existe	ence if less	s than 5 years						3		.05293
Enter the net value of noncharita	ble-use as	sets for 2010 from Part X	, line 5		-		_	4		100,157
Multiply line 4 by line 3								5		5,302
Enter 1% of net investment inco	me (1% o	f Part I, line 27b)						6		16
										5 240
Add lines 5 and 6								7		5,318
7 Add lines 5 and 63 Enter qualifying distributions fro	m Part XII	, line 4						8		3,675

_	350-FF (2010) THE NALSE! FAMILY FOUNDATION				104 \	<u> 40-</u>	<u> 4040</u>	<u>441</u>	<u> </u>	age 4
_	rt VI] Excise Tax Based on Investment Income (Section 4940				10(e), or 4	948	- See II	nstru	ction	<u> </u>
	Exempt operating foundations described in section 4940(d)(2), check here 🕨 🔲 and en) :					
	Date of ruling or determination letter: (attach copy of letter if nece				B) [
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here	·	and	l enter 1%	}	_1_	<u> </u>			<u>31.</u>
	of Part I, line 27b									
	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4%				b). ノ					_
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Other	ners e	nter	-0-)		2	 -			<u>0.</u>
•	Add lines 1 and 2					_3_	 			<u>31.</u>
	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Ot	hers e	enter	-0-)		4	 			0.
	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-					_5_	 			<u>31.</u>
	Credits/Payments:	1 _	ı			•				
	2010 estimated tax payments and 2009 overpayment credited to 2010	6a_	+-			1				
	Exempt foreign organizations - tax withheld at source	<u>6b</u>	+-		20	}]			
	Tax paid with application for extension of time to file (Form 8868)	6c	+-		30.					
	Backup withholding erroneously withheld	64				_				20
	Total credits and payments. Add lines 6a through 6d					<u>_7</u>	├			<u>30.</u>
	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attack.	ned				8	}			
	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed					9	 			1.
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			1.		10	 			
	rt VII-A Statements Regarding Activities			<u></u> !	Refunded 🚩	11	ــــــــــــــــــــــــــــــــــــــ			
				d it norticino	to or interiors			Τ Τ	Yes	No
18	During the tax year, did the foundation attempt to influence any national, state, or local legisl	anon	OF OI	и прагистра	te or intervene	III		-	103	X
	any political campaign? Did it spend more than \$100 during the year (either directly or indirectly) for political purpos	00 (00		otruotiono fo	r datinition\2			1a 1b		X
D	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and					dor		'''		
	distributed by the foundation in connection with the activities	copi	62.0	n any mate	ilais publisite	u or)]	Ì	
_	Did the foundation file Form 1120-POL for this year?							10		x
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the	voor.						1		
u	(1) On the foundation. \$		2		0.					
۵	Enter the reimbursement (if any) paid by the foundation during the year for political expendit					-		1]		
٠	managers. > \$ 0.			,p0300 011 10	unounon					
2	Has the foundation engaged in any activities that have not previously been reported to the IF	RS?						2		x _
-	If "Yes," attach a detailed description of the activities.	.0								
3	Has the foundation made any changes, not previously reported to the IRS, in its governing in	nstrun	nent.	articles of i	ncorporation, (or		1		
-	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the change		,	,				3		_X_
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year							48		X
	If "Yes," has it filed a tax return on Form 990-T for this year?					1	A\N	4b		
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?						•	5		X
	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 ei	ther:								
	By language in the governing instrument, or									
	By state legislation that effectively amends the governing instrument so that no mandatory	y direc	ction	s that confli	ct with the stat	e law		1		
	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	
ı	If "Yes," complete Part II, col. (c), and Part XV									
88	Enter the states to which the foundation reports or with which it is registered (see instructio	ns) 🕨	- _					1		1
	KS									
t	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the A	ttorne	y Ge	neral (or de:	signate)			1		
	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 se	ction -	4942	2(1)(3) or 49	12(j)(5) for cal	endar		1		1
	year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If "Yes," c	ompl	lete .	Part XIV				9		X
10	Did any persons become substantial contributors during the tax year? if "yes " attach a school							10		l Y

1 All any time during the year, add the foundation, directly or indirectly, own a controlled eithly within the meaning of saction \$12(0) (137) if Yes, attach schedule (see instructions) 2 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before 2 August 17, 20087 3 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 3 Website address ➤ N/A 3 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 4 The books are nace of ► JOHN F. HALSEY 4 Telephone in D. ▶ 913-341-3642 5 Zebon 4947(0) (i) pnoexemptic charitable trusts filling from \$90+Pin in eur of rorn 1041 - Check here 3 and either the amount of tax exemptic interest received or accrued during the year 4 A any time during calendar year 2011, did the foundation have an interest in or a signalure or other authority over a bank, 3 Secritical Properties, or other rinancial account in a foreign country? 5 See page 20 of the instructions for exceptions and filling requirements for Form 10 F 90-22.1. If Yes,* enter the name of the foreign country? 5 See page 20 of the instructions for exceptions and filling requirements for Form 4720 May Be Required 7 File Form 4720 for any item is checked in the "Yes" column, unless an exception applies. 1 During the year off the foundation (either directly) or indirectly); 1 Engage in the sale or exchange, or lessing of property with a disqualified person? 2 File Form 4720 for any item is checked in the "Yes" column, unless an exception applies. 1 During the year off the foundation for the property with a disqualified person? 3 Firmish goods, services, or facilities to (or accept them tom) a disqualified person? 4 Pyes Compensation (i.e., or year or embruses the sepanses of, a disqualified person? 5 File Form 4720 for any item is checked in the "Yes" column, unless an exception applies. 1 Temperature of order the services of the sepanses of, a disqualified person?	orm 990-PF (2010) THE HALSEY FAMILY FOUNDATION	20-2828	241	Page 5
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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.) c if the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. Joint the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? If "Yes," did it have excess business holdings in 2010 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 2010.) A 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 had not been removed from jeopardy before the first day of the tax year beginning in 2010?			1 1	\
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c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and			
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? b if "Yes," did it have excess business holdings in 2010 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 2010.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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 2010? 4b X	statement - see instructions.)	N/A	2b	
during the year? b If "Yes," did it have excess business holdings in 2010 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 2010.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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 2010? 4b X	c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			
during the year? b If "Yes," did it have excess business holdings in 2010 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 2010.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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 2010? 4b X	> ,,,,,		1	
b if "Yes," did it have excess business holdings in 2010 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 2010.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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 2010? 4b X	3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
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 2010.) N/A Build the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? build 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 2010? 4b X	during the year?	Yes X No	1 1	
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 2010.) 4a 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 had not been removed from jeopardy before the first day of the tax year beginning in 2010? 4b X	b If "Yes," did it have excess business holdings in 2010 as a result of (1) any purchase by the foundation or disqualified pers	ons after		
Form 4720, to determine if the foundation had excess business holdings in 2010.) 4a 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 had not been removed from jeopardy before the first day of the tax year beginning in 2010? 4b X	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		1
4a 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 had not been removed from jeopardy before the first day of the tax year beginning in 2010? 4b X	of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schei	dule C,	{ }	
4a 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 had not been removed from jeopardy before the first day of the tax year beginning in 2010? 4b X	Form 4720, to determine if the foundation had excess business holdings in 2010.)	N/A	3b	
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 2010? 4b X	4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	X
had not been removed from jeopardy before the first day of the tax year beginning in 2010? 4b X	b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable p	urpose that		
			4b	X
Form 990-PF (2010)		Fo	rm 990-	PF (2010)

Form 990-PF (2010) THE HALSEY FAMILY FOUNDA			<u> 20-28282</u>	41	Page 6
Part VII-B Statements Regarding Activities for Which F	orm 4720 May Be F	Required (contin	ued)		
5a During the year did the foundation pay or incur any amount to:				[
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	1 4945(e))?	Ye	s X No	ļ	
(2) Influence the outcome of any specific public election (see section 4955); o	r to carry on, directly or indire			İ	- 1
any voter registration drive?			s X No	İ	Ì
(3) Provide a grant to an individual for travel, study, or other similar purposes	?	Ye	s X No		ļ
(4) Provide a grant to an organization other than a charitable, etc., organization	n described in section				l
509(a)(1), (2), or (3), or section 4940(d)(2)?			s X No		
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or t				ŀ
the prevention of cruelty to children or animals?			s X No		1
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und		in Regulations	/-		
section 53.4945 or in a current notice regarding disaster assistance (see instru	·		N/A	5b	-
Organizations relying on a current notice regarding disaster assistance check h		4		1	
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption for			. —		
expenditure responsibility for the grant?		1/A L Ye	8 No	Ì	
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 a personal benefit contract?	pay premiums on		s X No	- }	-
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	perconal hanafit contract?	10		6b	x
If "Yes" to 6b, file Form 8870.	cisonal penent contract.		F	-	- 1
7a At any time during the tax year, was the foundation a party to a prohibited tax s	helter transaction?	□ v	s X No		
b if "Yes," did the foundation receive any proceeds or have any net income attribu				7b	
Part VIII Information About Officers, Directors, Trust		nagers, Highly			
Part VIII Paid Employees, and Contractors					
1 List all officers, directors, trustees, foundation managers and their	compensation.				
(a) Name and address	(b) Title, and average hours per week devoted	(c) Compensation (If not paid,	(d) Contributions to employee benefit plans and deferred	(e	Expense ount, other
	to position	enter -0-)	compensation	a	llowances
JOHN F. HALSEY	TRUSTEE				
149 DUCK HAWK WAY					_
MARIETTA, SC 29661	1.00	0.	0.	+	0.
SANDRA M. HALSEY	TRUSTEE				
149 DUCK HAWK WAY MARIETTA, SC 29661	1 00		_		٥
MARIETTA, SC 29661	1.00	0.	0.	'	0.
	-				
	1				
		 	-	†	
	1		1	1	
	1				
2 Compensation of five highest-paid employees (other than those inc	cluded on line 1). If none	, enter "NONE."		Ţ	
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	(d) Contributions to employee benefit plans	300	Expense count, other
(a) Haine and address of cach employee paid more than \$50,000	devoted to position	(C) Compensation	and deferred compensation	a	llowances
NONE		Ì	ĺ		
				<u> </u>	
			ļ	1	
			 	—	
	4			1	
	 		-	+	
	-				
	 	+	 	┿-	
	1				
Total number of other employees paid over \$50,000	<u> </u>		<u> </u>	—	0

THE HALSEY FAMILY FOUNDATION		8828241 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation 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		
	1	
	†	
	4	
	-	
	4	
	1	
The state of allowing over 050,000 for a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a state of a sta	1	
Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities	· · · · · · · · · · · · · · · · · · ·	<u>▶</u> 0
		
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 produ		Expenses
	ceu, etc.	· · · · · · · · · · · · · · · · · · ·
1 N/A		
2		
3		
		
4		
B IV B		·
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on li	nes 1 and 2.	Amount
1N/A		
		
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 n	nust complete this par	. Foreign four	ndations, see	instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitab	le, etc., purposes:			
a	Average monthly fair market value of securities	, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		1a	61,082.
	Average of monthly cash balances			1b	61,082. 40,600.
	Fair market value of all other assets			1c	
	Total (add lines 1a, b, and c)			1d	101,682.
	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	101,682.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount	t, see instructions)		4	1,525.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and o	•		5	100,157.
6	Minimum investment return. Enter 5% of line 5			6	5,008.
P	Distributable Amount (see instructions) (Section 4942(j)(3) a foreign organizations check here and do not complete this part.		foundations ar	id certain	
1	Minimum investment return from Part X, line 6			1	5,008.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	31.		
b	Income tax for 2010. (This does not include the tax from Part VI.)	26			
C	Add lines 2a and 2b			2c	31.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	4,977.
4	Recoveries of amounts treated as qualifying distributions			4	0.
5	Add lines 3 and 4			5	4,977.
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	t XIII, line 1		7	4,977.
P	art XII Qualifying Distributions (see instructions)				
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., pur	poses:			
8	Expenses, contributions, gifts, etc total from Part I, column (d), line 26			1a	3,675.
þ	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 charita	ble, etc., purposes		2	
3	Amounts set aside for specific charitable projects that satisfy the:				
a	Suitability test (prior IRS approval required)			3a	
Ь	Cash distribution test (attach the required schedule)			3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, a	•		4	3,675.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investigations.	estment			_
	income. Enter 1% of Part I, line 27b			5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4			6	3,675.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years in	when calculating whether	the foundation	qualifies for th	e section

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4940(e) reduction of tax in those years.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI,				
line 7				4,977.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			0.	
b Total for prior years:				
		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005				
b From 2006				
c From 2007 516.				
d From 2008 2,976.				
e From 2009 3, 425.				
f Total of lines 3a through e	6,917.			
4 Qualifying distributions for 2010 from				
Part XII, line 4: ► \$ 3 , 675 .				
a Applied to 2009, but not more than line 2a			0.	
b Applied to undistributed income of prior				
years (Election required - see instructions)		0.		L
c Treated as distributions out of corpus				
(Election required - see instructions)	0.		1	
d Applied to 2010 distributable amount				3,675.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a))	1,302.			1,302.
6 Enter the net total of each column as indicated below:				
· · ·	5,615.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income. Subtract	3,013.			
line 4b from line 2b		0.		
c Enter the amount of prior years'		0.		
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 2009. Subtract line				
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2010. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2011			L	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 2005				
not applied on line 5 or line 7	0.		= -	-
9 Excess distributions carryover to 2011.				
Subtract lines 7 and 8 from line 6a	5,615.			
10 Analysis of line 9:				
a Excess from 2006				
b Excess from 2007				
c Excess from 2008 2,190.				
d Excess from 2009 3, 425.				
e Excess from 2010			<u> </u>	L

	SEY FAMILY				28241 Page 10
Part XIV Private Operating F	oundations (see in	structions and Part VII	A, question 9)	N/A	
1 % 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 i		4942(j)(3) or4	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum	(a) 2010	(b) 2009	(c) 2008	(d) 2007	(e) Total
investment return from Part X for	}				
each year listed					
b 85% of line 2a	l				
c Qualifying distributions from Part XII,					
line 4 for each year listed					
d Amounts included in line 2c not					
used directly for active conduct of		\			
exempt activities					<u> </u>
e Qualifying distributions made directly			ļ		
for active conduct of exempt activities.					
Subtract line 2d from line 2c	ļ				
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter:			ļ		
(1) Value of all assets		ļ			
(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,		1	\		
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	<u> </u>				<u> </u>
Part XV Supplementary Info			if the foundat	ion had \$5,000 or m	ore in assets
at any time during	the year-see the	instructions.)			
1 Information Regarding Foundation					
a List any managers of the foundation where year (but only if they have contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in the contributed in			tributions received by	the foundation before the cl	ose of any tax
SEE STATEMENT 7					
b List any managers of the foundation whether entity) of which the foundation has			(or an equally large p	portion of the ownership of a	partnership or
NONE					
2 Information Regarding Contribut	tion, Grant, Gift, Loan	, Scholarship, etc P	rograms:	·	
Check here X if the foundation the foundation makes gifts, grants, etc.	only makes contributions	to preselected charitable	organizations and do		
a The name, address, and telephone num					
	par barrie Will				
b The form in which applications should	be submitted and inform	ation and materials they s	hould include:		
c Any submission deadlines:					
d Any restrictions or limitations on award	ds, such as by geographic	cal areas, charitable fields	, kınds of institutions	s, or other factors:	
023801 12-07-10					Form 990-PF (2010)

3 Grants and Contributions Paid During the	e Year or Approved for Future F	Payment		
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 recipient	Purpose of grant or contribution	Amount
a Paid during the year	or substantial contributor	recipient		
a raid during the year				
	ļ			
SEE STATEMENT 8 Total		<u> </u>	▶ 3a	2,500
b Approved for future payment		1	, , , , , , , , , , , , , , , , , , ,	27300
			:	
NONE				
		Į.		
		<u> </u>		
Total			▶ 3b	0

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

inter gross amounts unless otherwise indicated.	Unrelate	d business income		led 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		-		
å	- 		 		
b					
C	_	- 	+		
d	_				
e	_				
f	_				
g Fees and contracts from government agencies					
2 Membership dues and assessments	L				
3 Interest on savings and temporary cash					
investments			14	1.	
4 Dividends and interest from securities			14	1,722.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
Net rental income or (loss) from personal	 				
property	——				
7 Other investment income	ļ				
8 Gain or (loss) from sales of assets other			i i		
than inventory	ļ				
9 Net income or (loss) from special events	<u> </u>		_		
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:			1		
8	_				
b					
C	I				
d	I				
Α					
12 Subtotal. Add columns (b), (d), and (e)).	1,723.	0.
13 Total. Add line 12, columns (b), (d), and (e)	<u> </u>				1,723.
(See worksheet in line 13 instructions to verify calculations.	1			''	<u> </u>
Part XVI-B Relationship of Activities					
Line No. Explain below how each activity for which in the foundation's exempt purposes (other the				outed importantly to the accom	plishment of
N/A					
			· · · · ·		
		·			
	<u> </u>				·
					
					
					
					-
					
		·			
					
		·		 	
			-		
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Part XVII	Information Re	garding Trans		nd Transaction	ns an	d Relationsh	ips With No	ncharitab		ye IS
	Exempt Organ						<u>. </u>			
1 Did the org	anization directly or indir	rectly engage in any o	of the following	with any other organ	nization	described in section	n 501(c) of		Yes	No
the Code (d	other than section 501(c))(3) organizations) or	r in section 527	7, relating to political (organiza	ations?				
a Transfers f	rom the reporting founda	ation to a noncharitat	ole exempt org	anızatıon of:						
(1) Cash								1a(1)	X
(2) Other	assets							18(2	2)	X
b Other trans	sactions:									
	of assets to a noncharital							1b(1	<u>) </u>	X
	ases of assets from a noi		rganization					1b(2	2)	X
	of facilities, equipment,	or other assets						1b(3)	X
	oursement arrangements							1b(4)	X
	or loan guarantees							1b(X
	mance of services or me	•	=					1b(0	9	X
-	facilities, equipment, ma			-		5 a 6		<u> 1c</u>		X
	er to any of the above is									
	s given by the reporting for the value of the goods,			U 1885 HIAH IAH HIAIKE	et value i	in any transaction	or snamny amang	jeniem, snow ii	1	
	(b) Amount involved			exempt organization		(d) Description	of transfers, transac	tions and sharing	arrangem	ents
(a) Emerio	(8) 741104111 111701104	(6) (10.110 0)	N/A	Oxonipt organization		(b) Description	or transiers, transac	nons, and sharing	arangon.	
			24/22							-
	- ··· · · · · · · · · · · · · · · · · ·					·	·			
						1				
						 				
						 				
		 								
 -						 				
2a Is the four	ndation directly or indirec	tly affiliated with, or i	related to, one	or more tax-exempt of	organiza	tions described		 -		
	501(c) of the Code (othe	= :		=	J. gaza				s 🔀	No
	omplete the following sch	, ,	,,,,							
	(a) Name of org			(b) Type of organiza	ation	(c) Description of	relationship		
	N/A									
		 								
Linda	w consistence of particular I declar	re that I have avaraged t	hie return includ	and accompanying school	ulaa aad	statements, and to the	had of my knowle	doe and belief it	. taua	
Sign and	or penalties of perjury, I declar complete Declaration of prep	arer (other than taxpayer	or ilduciary) is ba	ased on all information of	which pro	eparer has any knowle	edge	uge and beller, it is	s a de, con	6 C1,
Here	Bur Mai	In 1	I. An	Referent XI	Tul.	2011 1	Buen fitte	it.		
	Signature of officer or tr	ustee	11/	Date	Jung !		itle	wes_		
	Print/Type preparer's n		Preparer's s			Date	Check 1	PTIN		
	, po p. spa.o. o	· -		11	1	1	self- employed	1		
Paid	CONNIE HEN	IDERSON	Convi	Henden	_	7/27/11				
Preparer	Firm's name ► RSM		Y, INC		 -		Firm's EIN ▶			
Use Only				_						
	Firm's address > 48	301 MAIN S	TREET,	SUITE 40	0					
		NSAS CITY					Phone no.	816-753	-300	00

Form **8868**. (Rev January 2011)

Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

File a separate application for each return.

OMB No. 1545-1709

Form 8868 (Rev 1-2011)

 $\triangleright \overline{\mathbf{X}}$ If you are filing for an Automatic 3-Month Extension, complete only Part I and check this box If you are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this form). Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868. Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form. visit www irs gov/efile and click on e-file for Charities & Nonprofits. Automatic 3-Month Extension of Time. Only submit original (no copies needed). A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns. Name of exempt organization Employer identification number Type or print THE HALSEY FAMILY FOUNDATION 20-2828241 File by the Number, street, and room or suite no. If a P O box, see instructions due date for filing your 149 DUCK HAWK WAY return See instructions City, town or post office, state, and ZIP code. For a foreign address, see instructions MARIETTA, SC 29661 0 4 Enter the Return code for the return that this application is for (file a separate application for each return) Application Return **Application** Return Is For Code Is For Code 01 Form 990-T (corporation) Form 990 07 Form 990-BL Form 1041-A 80 Form 4720 Form 990-EZ 03 09 Form 5227 Form 990-PF 10 Form 990-T (sec 401(a) or 408(a) trust) Form 6069 05 11 Form 990-T (trust other than above) 06 Form 8870 12 JOHN F. HALSEY The books are in the care of ► 149 DUCK HAWK WAY - MARIETTA, SC 29661 Telephone No ▶ 913-341-3642 FAX No > If the organization does not have an office or place of business in the United States, check this box If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If this is for the whole group, check this box If it is for part of the group, check this box I and attach a list with the names and EINs of all members the extension is for I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2011 , to file the exempt organization return for the organization named above. The extension is for the organization's return for ► X calendar year 2010 or ___ , and ending 」tax year beginning Final return If the tax year entered in line 1 is for less than 12 months, check reason. Initial return Change in accounting period If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any 30. nonrefundable credits. See instructions 3a If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and ь 0. estimated tax payments made. Include any prior year overpayment allowed as a credit. 3b Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions Caution, If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

LHA

For Paperwork Reduction Act Notice, see Instructions.

FORM 990-PF INTEREST ON SAVI	NGS A	ND TEM	PORARY	CASH 1	NVESTMENTS	STATEMENT	1	
SOURCE						AMOUNT		
MERRILL LYNCH							1.	
TOTAL TO FORM 990-PF, PART I,	LINE	3, CO	LUMIN A				1.	
FORM 990-PF DIVIDEND	S AND	INTER	EST FRO	M SECU	JRITIES	STATEMENT	2	
SOURCE		GROSS	AMOUNT		PITAL GAINS	COLUMN (A	7)	
MERRILL LYNCH	•		1,722	•	0.	1,7	22.	
TOTAL TO FM 990-PF, PART I, LN 4		1,722.			0.	1,722.		
FORM 990-PF	STATEMENT	3						
DESCRIPTION	EXPE	A) NSES BOOKS		VEST-	(C) ADJUSTEI NET INCOM		(D) CHARITABLE PURPOSES	
ACCOUNTING FEES		1,175.	0.		•	1,1	L75.	
TO FORM 990-PF, PG 1, LN 16B		1,175.		0	•	1,175.		
FORM 990-PF	STATEMENT	4						
DESCRIPTION	EXPE	A) NSES BOOKS	(ENET IN	WEST-				
MANAGEMENT FEES		150.		150	•		0.	
TO FORM 990-PF, PG 1, LN 23	-	150.		150	•		0.	

FORM 990-PF U.S. AND STATE/C	ITY GOV	ERNMENT	OBLIGATIONS	STATEMENT	5
DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE	•
MERRILL LYNCH GOVERNMENT FUND	X		0.		0.
TOTAL U.S. GOVERNMENT OBLIGATIONS		-			
TOTAL STATE AND MUNICIPAL GOVERNMEN	T OBLIG	ATIONS			
TOTAL TO FORM 990-PF, PART II, LINE	10A	-	0.		0.
		=			
FORM 990-PF OTHE	R INVES	STMENTS		STATEMENT	-
DESCRIPTION		JATION THOD	BOOK VALUE	FAIR MARKET VALUE	1
ADVISORS DISCIPLINED TR	MET ————————————————————————————————————	THOD OST	45,371.	VALUE 42,91	2.
ADVISORS DISCIPLINED TR PRUDENTIAL JENNISON FUND	MET CC CC	THOD OST OST	45,371. 9,999.	VALUE 42,91 10,44	2.
DESCRIPTION ADVISORS DISCIPLINED TR PRUDENTIAL JENNISON FUND DAVIS NY VENTURE FD TOTAL TO FORM 990-PF, PART II, LINE	MET CC CC	THOD OST	45,371.	VALUE 42,91	2 . 16 . 34 .

NAME OF MANAGER

JOHN F. HALSEY SANDRA M. HALSEY

FORM 990-PF

STATEMENT 8

PAID DURING THE YEAR					
RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT		AMOUNT		
ALZHEIMER'S ASSOCIATION 225 N. MICHIGAN AVENUE, 17TH FLOOR CHICAGO, IL 60601	NONE MISSIONS AND BENEVOLENCES	EXEMPT	250.		
	NONE MISSIONS AND BENEVOLENCES	EXEMPT	250.		
NATIONAL AUDUBON SOCIETY 225 VARICK STREET NEW YORK, NY 10014		EXEMPT	270.		
NATURE CONSERVANCY 4245 NORTH FAIRFAX DRIVE, SUITE 100 ARLINGTON, VA 22203-1606	MISSIONS AND	EXEMPT	450.		
THE SALVATION ARMY 1130 HAMPTON AVE. ST LOUIS, MO 63139		EXEMPT	400.		
VETERANS OF FOREIGN WARS 1419 SWIFT AVENUE KANSAS CITY, MO 64116-3921	NONE MISSIONS AND BENEVOLENCES	EXEMPT	130.		
PETS FOR LIFE 7240 WORNALL ROAD KANSAS CITY, MO 64114	NONE MISSIONS AND BENEVOLENCES	EXEMPT	400.		
NATIONAL WILDLIFE FEDERATION 11100 WILDLIFE CENTER DRIVE RESTON, VA 20190	NONE MISSIONS AND BENEVOLENCES	EXEMPT	250.		

GRANTS AND CONTRIBUTIONS

20-2828241

THE HERITAGE FOUNDATION 214 MASSACHUSETTS AVE NE WASHINGTON, DC 20002

NONE MISSIONS AND **BENEVOLENCES** EXEMPT

100.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

2,500.