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2010

# **50rm** 990-PF

Department of the Treasury

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

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

Internal Revenue Service , and ending 12-31-2010 For calendar year 2010, or tax year beginning 01-01-2010 Initial return G Check all that apply Initial return of a former public charity Final return A mended return Address change Name change A Employer identification number Name of foundation The Loftus Family Foundation 20-8067422 **B** Telephone number (see page 10 of the instructions) Number and street (or P O box number if mail is not delivered to street address) c/o Foundation Source 501 Silversid (800) 839-1754 C If exemption application is pending, check here City or town, state, and ZIP code Wilmington, DE 198091377 D 1. Foreign organizations, check here **H** Check type of organization Section 501(c)(3) exempt private foundation 2. Foreign organizations meeting the 85% test, check here and attach computation E If private foundation status was terminated Cash Accrual **J** Accounting method I Fair market value of all assets at end under section 507(b)(1)(A), check here of year (from Part II, col. (c), Other (specify) F If the foundation is in a 60-month termination line 16) 🖛 \$ 6,852,142 (Part I, column (d) must be on cash basis.) under section 507(b)(1)(B), check here Part I Analysis of Revenue and Expenses (The (d) Disbursements (a) Revenue and (b) Net investment (c) Adjusted net for charitable total of amounts in columns (b), (c), and (d) may not expenses per necessarily equal the amounts in column (a) (see page 11 of income income purposes books (cash basis only) the instructions) ) 1 Contributions, gifts, grants, etc , received (attach schedule) Check F required to attach Sch B Interest on savings and temporary cash investments 10 10 3 95,178 95,178 Dividends and interest from securities. . . Gross rents . . . . b Net rental income or (loss) 夗 30.440 Net gain or (loss) from sale of assets not on line 10 Gross sales price for all assets on line 6a 30.440 Capital gain net income (from Part IV, line 2) . . Net short-term capital gain . . . Income modifications . . . . 10a Gross sales less returns and allowances Less Cost of goods sold . . . Gross profit or (loss) (attach schedule) c 夗 2.218 Other income (attach schedule) 11 127 846 125 628 Total. Add lines 1 through 11 12 Compensation of officers, directors, trustees, etc 13 Other employee salaries and wages 14 Operating and Administrative Expenses 15 Pension plans, employee benefits . Legal fees (attach schedule). . Accounting fees (attach schedule). Other professional fees (attach schedule) 17 烟 1.474 1.274 18 Taxes (attach schedule) (see page 14 of the instructions) Depreciation (attach schedule) and depletion 20 Occupancy . . . . . . 21 Travel, conferences, and meetings . Printing and publications . . . 22 30,238 30,254 Other expenses (attach schedule) . 匆 -16 23 24 Total operating and administrative expenses. Add lines 13 through 23 . . . . . 31.712 1.258 30.254 319.652 319.652 25 Contributions, gifts, grants paid. . . . 351.364 1,258 349,906 Total expenses and disbursements. Add lines 24 and 25 27 Subtract line 26 from line 12 Excess of revenue over expenses and disbursements -223,518 Net investment income (if negative, enter - 0 - ) 124,370 **Adjusted net income** (if negative, enter -0-)

Pa	rt II	Balance Sheets should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book V		(c) Fair Market Value
	1	Cash—non-interest-bearing				
	2	Savings and temporary cash investments	4,953,229	4,	301,796	4,301,796
	3	Accounts receivable				
		Less allowance for doubtful accounts 🕨				
		Pledges receivable 🟲				
		Less allowance for doubtful accounts 🟲				
	5	Grants receivable				
	_	Receivables due from officers, directors, trustees, and other				
		disqualified persons (attach schedule) (see page 15 of the				
		instructions)				
	7	Other notes and loans receivable (attach schedule)				
	,					
ا بر		Less allowance for doubtful accounts 🟲				
2	8	Inventories for sale or use				
ŝ	9	Prepaid expenses and deferred charges				
	10a	Investments—U S and state government obligations (attach schedule)	319,495	<b>6</b>	322,282	356,536
	ь	Investments—corporate stock (attach schedule)	1,564,304	<b>%</b> 1,	989,432	2,193,810
	c	Investments—corporate bonds (attach schedule)				
	11	Investments—land, buildings, and equipment basis 🕨				
		Less accumulated depreciation (attach schedule) 🟲				
	12	Investments—mortgage loans				
	13	Investments—other (attach schedule)				
	14	Land, buildings, and equipment basis 🟲				
		Less accumulated depreciation (attach schedule)				
	15	Other assets (describe)				
		Total assets (to be completed by all filers—see the				
		instructions Also, see page 1, item I)	6,837,028	6,	613,510	6,852,142
		Accounts payable and accrued expenses				
		Grants payable				1
л	19	Deferred revenue				-
₽		Loans from officers, directors, trustees, and other disqualified persons				1
_		Mortgages and other notes payable (attach schedule)				1
[]		Other liabilities (describe				1
						1
	23	Total liabilities (add lines 17 through 22)			0	
		Foundations that follow SFAS 117, check here ▶ □				
		and complete lines 24 through 26 and lines 30 and 31.				
<u>\$</u>	24	Unrestricted				
or Fund Balance	25	Temporarily restricted				1
8	26	Permanently restricted				1
┋┃		Foundations that do not follow SFAS 117, check here				1
틧		and complete lines 27 through 31.				
Ξ	27	Capital stock, trust principal, or current funds				
- 1	28	Paid-in or capital surplus, or land, bldg , and equipment fund				1
衸		Retained earnings, accumulated income, endowment, or other funds	6,837,028	6,	613,510	
Assets		Total net assets or fund balances (see page 17 of the				
ĕ		instructions)	6,837,028	6,	613,510	
-	31	Total liabilities and net assets/fund balances (see page 17 of				1
		the instructions)	6,837,028	6,	613,510	
			, ,	<u>,                                      </u>		<u> </u>
Pa	rt II	Analysis of Changes in Net Assets or Fund Balances				
1		Total net assets or fund balances at beginning of year—Part II, column	(a), line 30 (must aç	ree		
		with end-of-year figure reported on prior year's return)			1	6,837,028
2		Enter amount from Part I, line 27a			2	-223,518
3		Other increases not included in line 2 (itemize) 🟲			3	
4		Add lines 1, 2, and 3			4	6,613,510
5		Decreases not included in line 2 (itemize) 🟲			5	
6		Total net assets or fund balances at end of year (line 4 minus line 5)—P		ne 30	6	6,613,510

	e the kind(s) of property sold (e g , re house, or common stock, 200 shs M		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr )	( <b>d)</b> Date sold (mo , day, yr )
1 a Publicly-traded Sec	urities				
b					
с					
d					
е					
(e) Gross sales price	<b>(f)</b> Depreciation allowe (or allowable)	1 107	t or other basis pense of sale		or (loss) ) mınus (g)
a	380,923		350,48	3	30,440
b					
С					
d					
e					
Complete only for assets	s showing gain in column (h) and owne	d by the foundation	n on 12/31/69	(I) Gains (Col	(h) gain minus
(i) F M V as of 12/31/6	9 (j) A djusted basis as of 12/31/69		ess of col (ı) ol (j), ıf any	col (k), but not	less than -0-) <b>or</b> om col (h))
a					30,440
b					
с					
d					
<u>е</u>					
2 Capital gain net inc	ome or (net capital loss)	If gain, also enter If (loss), enter - 0-		. 2	30,440
Not short-term can	ى ital gaın or (loss) as defined ın sectio	ns 1222(5) and (6)	, \	2	30,44
·				,	
If gaın, also enter ır If (loss), enter -0- ı	n Part I, line 8, column (c) (see pages		nstructions)	}	
Part V Qualification	In Part I, line 8			J  3	
f "Yes," the foundation does	the section 4942 tax on the distributa not qualify under section 4940(e) Do	not complete this	part		┌ Yes ┌ No
	nount in each column for each year, so	ee page 18 of the ir	nstructions before		
(a) Base period years Calendar year (or tax year beginning in)	<b>(b)</b> Adjusted qualifying distributions	(c) Net value of nonchai		<b>(d)</b> Distribution (col (b) divided	n ratio
2009	348,662		6,958,985		000 050102
2008	155,533		7,037,798		000 022100
2007	115,921		5,531,467		000 020957
2006			985,545		
2005					
	4.0				
	mn (d)		· · · · · ·	2	000 09315
	n ratio for the 5-year base period—div s the foundation has been in existence			3	000 02329
the number of yours	the realisation has been in existence	o ii ress tiidii s , ca			
4 Enter the net value	of noncharitable-use assets for 2010	) from Part X, line 5	5	4	6,830,59
5 Multiply line 4 by li	ne 3			5	159,08
6 Enter 1% of net inv	estment income (1% of Part I, line 2	7b)		6	1,24
7 Add lines 5 and 6.				7	160,32
8 Enter qualifying dis	tributions from Part XII, line 4			8	349,906
If line 8 is equal to the Part VI instruct	or greater than line 7, check the box	ın Part VI, lıne 1b,	and complete that	part using a 1% tax	rate See

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
	Website address ▶			l
14	The books are in care of ▶co Foundation Source	1830-	1754	
	Located at 501 Silverside Road Suite 123 Wilmington DE ZIP+4 1980913		1/34	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here and enter the amount of tax-exempt interest received or accrued during the year			<b>P</b>
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over			
	a bank, securities, or other financial account in a foreign country?	16		No
	See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country			
Pai	rt VIII-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
<b>1</b> a	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 dısqualıfıed person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes Vo			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes V No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available			
	for the benefit or use of a disqualified person)?			
	(6) A gree 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 ) <b>Yes</b> 🔽 <b>No</b>			
Ь	If any answer is "Yes" to 1a(1)-(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations			
	section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here			
С	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts,			
	that were not corrected before the first day of the tax year beginning in 2010?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private			
	operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
а	At the end of tax year 2010, did the foundation have any undistributed income (lines 6d			
	and 6e, Part XIII) for tax year(s) beginning before 2010?			
	If "Yes," list the years > 20, 20, 20			
Ь	Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see page 20 of the instructions)	2b		
_	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here	<u> </u>		
С				
2-	▶ 20, 20, 20, 20 Did the foundation hold more than a 2% direct or indirect interest in any business			
3a	enterprise at any time during the year?			
ь	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.).	3ь		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
ь	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		No

Pa	rt VII-B	Statements Rega	rdir	ng Activities for	Wh	ich Form 4720	Мау	Be Required (cont	inue	1)		
5a	During th	e year did the foundation	прау	or incur any amoun	t to							
	(1) Carry	on propaganda, or othe	rwise	attempt to influence	e leg	ıslatıon (section 49	45(e))	γ Γ Yes Γ	√ No			
	<b>(2)</b> Influe	nce the outcome of any	spec	ıfıc publıc electıon (	see:	section 4955), or to	carry	,				
	on, dı	rectly or indirectly, any	voter	registration drive?.				🗆 Yes 🖟	- No			
	<b>(3)</b> Provi	de a grant to an individu	al for	travel, study, or oth	nersi	mılar purposes?		☐ Yes Ϝ	√ No			
	<b>(4)</b> Provi	de a grant to an organiza	ition	other than a charita	ble, e	etc , organization de	scribe	d				
	ın sec	tion 509(a)(1), (2), or (	3), oı	r section 4940(d)(2	)? (s	ee page 22 of the in	struct	ions) <b>T Yes F</b>	- No			
	<b>(5)</b> Provi	de for any purpose other	than	religious, charitable	e, sc	ientific, literary, or						
	educa	ational purposes, or for t	he pr	evention of cruelty t	o ch	ıldren or anımals?.		T Yes 🕟	- No			
ь	If any ans	swerıs "Yes" to 5a(1)-(	5), dı	d <b>any</b> of the transac	tions	fail to qualify under	r the e	xceptions described in				
	Regulatio	ns section 53 4945 or i	nac	urrent notice regard	ıng d	ısaster assıstance	(see p	age 22 of the instruction	ns)?	5b		
	O rganızat	tions relying on a curren	t not	ice regarding disast	eras	sistance check here	e	▶↑	_			
С		wer is "Yes" to question										
	tax becau	ise it maintained expend	liture	responsibility for th	ne gra	ant?		<b>T</b> Yes 「	- No			
	If "Yes," a	attach the statement requ	ired b	y Regulations section	n 53.	4945-5(d).						
6a	Did the fo	undation, during the yea	ır, re	ceive any funds, dire	ctly	or indirectly, to pay						
	premiums	on a personal benefit c	ontra	ct <sup>?</sup>				Yes	- No			
ь	Did the fo	undation, during the yea	ır, pa	y premiums, directly	or i	ndırectly, on a perso	nal be	enefit contract?		6Ь		No
	If "Yes" to	o 6b, file Form 8870.										
7a	At any tır	ne during the tax year, v	as th	ne foundation a party	/ to a	prohibited tax shel	ter tra	nsaction? <b>Tyes</b> (	√ No			
ь	If yes, did	d the foundation receive	any	proceeds or have an	y net	: income attributable	e to th	e transaction?		7b	Yes	
	/	Information Abou	t Off	ficers, Directors	s, Tr	ustees, Founda	ition	Managers, Highly	Paid	Emp	loye	es,
Ра	rt VIII	and Contractors										
_1_	List all off	icers, directors, trustee							ns).			
	<b>(a)</b> Na	me and address	(b)	Title, and average hours per week		c) Compensation  If not paid, enter		<b>d)</b> Contributions to iployee benefit plans	(e) E	xpens	e acc	ount,
	(a) Na	ille alla address	d∈	voted to position	'	-0-)	1	deferred compensation	oth	ner all	owanc	es
John	Loftus		Pres	ident / Director /		0						
c/o l	oundation	Source 501 Silversid		retary								
Wilm	iington, DE	19809	010	00								
2	-	tion of five highest-paid	lemp	loyees (ot her t han	t hose	e included on line 1–	-see p	age 23 of the instruction	ons).			
	ir none, e	nter "NONE."						(d) Contributions to				
(a)	Name and	address of each employ	/ee	(b) Title, and aver	_	(-) (		employee benefit	(e) E	xpens	se acc	ount,
	paid r	nore than \$50,000		hours per week devoted to positi		(c) Compensatio	<sup>'n</sup>	plans and deferred	ot	ner all	owanc	es
								compensation				
NON	I E											
Tota	Inumbero	fother employees haid o	ver	t 5.0 0.00					1			

Part VIII Information About Officers, Directors, Trust and Contractors (continued)	ees, Foundation Managers, Highly	, Paid Employees,
3 Five highest-paid independent contractors for professional services	(see page 23 of the instructions). If none, o	enter "NONE".
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
otal number of others receiving over \$50,000 for professional services.  Part IX-A Summary of Direct Charitable Activities		
ist the foundation's four largest direct charitable activities during the tax year. Include re rganizations and other beneficiaries served, conferences convened, research papers prod		Expenses
1		-
2		
3		_
4		-
		- -
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during  1	the tax year on lines 1 and 2	A mount
		-
2		
All other program-related investments See page 24 of the instruction 3	s	
		<u> </u>
ntal Add lines 1 through 3	<b>.</b>	

Form	990-PF (2010)		Page <b>8</b>
Pa	<b>Minimum Investment Return</b> (All domestic foundations must complete this part. For see page 24 of the instructions.)	reign	foundations,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc ,		
	purposes		
а	A verage monthly fair market value of securities	1a	2,195,641
b	A verage of monthly cash balances	1b	4,738,976
c	Fair market value of all other assets (see page 24 of the instructions)	<b>1</b> c	0
d	<b>Total</b> (add lines 1a, b, and c)	1d	6,934,617
e	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	6,934,617
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25		
	of the instructions) 📆	4	104,019
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	6,830,598
6	Minimum investment return. Enter 5% of line 5	6	341,530
Dat	<b>Distributable Amount</b> (see page 25 of the instructions) (Section 4942(j)(3) and (j)(		
FC	foundations and certain foreign organizations check here 🕨 🗀 and do not complete t	his pa	art.)
1	Minimum investment return from Part X, line 6	1	341,530
2a	Tax on investment income for 2010 from Part VI, line 5 2a 1,244		
b	Income tax for 2010 (This does not include the tax from Part VI) 2b		
c	Add lines 2a and 2b	2c	1,244
3	Distributable amount before adjustments Subtract line 2c from line 1	3	340,286
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	340,286
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII,		
	line 1	7	340,286
Par	t XII Qualifying Distributions (see page 25 of the instructions)		
1	A mounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
а	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26 🕏	1a	349,906
b	Program-related investments—total from Part IX-B	1b	
2	A mounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc ,		
	purposes	2	
3	A mounts set aside for specific charitable projects that satisfy the		
а	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, and Part XIII, line 4	4	349,906
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		,
	income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	1,244
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	348,662
-	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the section 4940(e) reduction of tax in those years		· · · · · · · · · · · · · · · · · · ·

Р	art XIII Undistributed Income (see page	26 of the instruc	tions)		
		(a) Corpus	(b) Years prior to 2009	(c) 2009	( <b>d</b> ) 2010
1	Distributable amount for 2010 from Part XI, line 7				340,286
2	Undistributed income, if any, as of the end of 2010				
а	Enter amount for 2009 only			347,265	
ь	Total for prior years 20, 20, 20				
	Excess distributions carryover, if any, to 2010				
	From 2005				
	From 2006	1			
	From 2007	1			
	From 2008				
	From 2009				
	Total of lines 3a through e	]			
	Qualifying distributions for 2010 from Part				
	XII, line 4 🕨 \$ 349,906				
а	Applied to 2009, but not more than line 2a			347,265	
ь	Applied to undistributed income of prior years				
	(Election required—see page 26 of the instructions)				
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
d	Applied to 2010 distributable amount				2,641
e	Remaining amount distributed out of corpus				
5	Excess distributions carryover applied to 2010				
	(If an amount appears in column (d), the same amount must be shown in column (a).)				
6	Enter the net total of each column as indicated below:				
а	Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b	Prior years' undistributed income Subtract line 4b from line 2b				
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 Subtract line 6c from line 6b Taxable				
a	amount—see page 27 of the instructions				
e	Undistributed income for 2009 Subtract line				
Ū	4a from line 2a Taxable amount—see page 27				
	of the instructions				
f	Undistributed income for 2010 Subtract				
	lines 4d and 5 from line 1 This amount must				337,645
_	be distributed in 2011				
7	A mounts treated as distributions out of corpus to satisfy requirements imposed by				
	section 170(b)(1)(F) or 4942(g)(3) (see page 27				
	of the instructions)				
8	Excess distributions carryover from 2005 not				
	applied on line 5 or line 7 (see page 27 of the				
	instructions)				
9	Excess distributions carryover to 2011.				
10	Subtract lines 7 and 8 from line 6a			+	
	A nalysis of line 9				
a L	Excess from 2006 Excess from 2007	1			
D	Excess from 2007	1			
	Excess from 2009	1			
	Excess from 2010				
			1		

b The form in which applications should be submitted and information and materials they should include

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other

c Any submission deadlines

factors

Form **990-PF** (2010)

3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Foundation Purpose of grant or show any relationship to status of A mount any foundation manager contribution recipient Name and address (home or business) or substantial contributor a Paid during the year See Additional Data Table 319,652 **b** Approved for future payment

Enter gross amounts unless otherwise indicated  Unrelated business income  Excluded by section 512, 513, or 514  Related or exemption function income	Form 990-	PF (2010)  I-A Analysis of Income-Produc	ina Activitie				Page <b>1</b> .
(a) (b) (c) (d) function income (See page 28 of the instructions a b					Excluded by section	512, 513, or 514	
a b c c d d d d d d d d d d d d d d d d d	_		I I				function income (See page 28 of
b	а						the mstructions
d							
e f g Fees and contracts from government agencies  2 Membership dues and assessments							
g Fees and contracts from government agencies  2 Membership dues and assessments	d						
g Fees and contracts from government agencies 2 Membership dues and assessments							
2 Membership dues and assessments	f						
3 Interest on savings and temporary cash investments 4 Dividends and interest from securities	_						
4 Dividends and interest from securities					14	10	
5 Net rental income or (loss) from real estate a Debt-financed property b Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from sales of inventory. 10 Gross profit or (loss) from sales of inventory. 11 Other revenue a federal Tax Refund b					+		
a Debt-financed property					1	33,170	
b Not debt-financed property		• •					
6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from special events 10 Gross profit or (loss) from sales of inventory 11 Other revenue aFederal Tax Refund  b  c  d  e  12 Subtotal Add columns (b), (d), and (e)							
8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from special events 10 Gross profit or (loss) from sales of inventory. 11 Other revenue aFederal Tax Refund  b c d e 12 Subtotal Add columns (b), (d), and (e). 13 Total. Add line 12, columns (b), (d), and (e).  (See worksheet in line 13 instructions on page 28 to verify calculations)  Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes  Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See							
9 Net income or (loss) from special events 10 Gross profit or (loss) from sales of inventory. 11 Other revenue aFederal Tax Refund  b  c  d  e  12 Subtotal Add columns (b), (d), and (e). 13 Total. Add line 12, columns (b), (d), and (e).  (See worksheet in line 13 instructions on page 28 to verify calculations)  Part XVI-B  Relationship of Activities to the Accomplishment of Exempt Purposes  Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See	<b>7</b> Other	investment income					
10 Gross profit or (loss) from sales of inventory.  11 Other revenue a Federal Tax Refund  b  c  d  e  12 Subtotal Add columns (b), (d), and (e).  13 Total. Add line 12, columns (b), (d), and (e).  14 (See worksheet in line 13 instructions on page 28 to verify calculations)  15 Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes  Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See	8 Gain or	(loss) from sales of assets other than inventory			18	30,440	
11 Other revenue a Federal Tax Refund 01 2,218  b							
b					01	2 210	
c d long long long long long long long long					01	2,210	
d							
Subtotal Add columns (b), (d), and (e).  12 Subtotal Add line 12, columns (b), (d), and (e).  13 Total. Add line 12, columns (b), (d), and (e).  (See worksheet in line 13 instructions on page 28 to verify calculations)  Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes  Line No.  Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See							
12 Subtotal Add columns (b), (d), and (e)							
13 Total. Add line 12, columns (b), (d), and (e)						127,846	
(See worksheet in line 13 instructions on page 28 to verify calculations )  Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes  Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See						 3	127,846
Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See					F B		
the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See							ntly to
page 28 of the instructions )			n's exempt purp	oses (other than b	by providing funds fo	r such purposes)	(See
		page 28 of the instructions )					

	90-PF (2 <b>XVII</b>		egarding 1	ransfers To and Trar	1627	ctions and Relations	hine With		Рa	ge <b>13</b>
rart	VATT	Noncharitable			134	ctions and Relations	mps with			
<b>1</b> Did t	the organi	zation directly or indirectly	y engage in any	of the following with any other o	rganız	ration described in section			Yes	No
501(	c) of the	Code (other than section	501(c)(3) orgai	nizations) or in section 527, relatir	ıg to p	political organizations?				
<b>a</b> Tra	nsfers fr	om the reporting four	ndation to a r	ioncharitable exempt organi	zatıc	on of				
(1)	Cash.							1a(1)		No
(2)	Othera	assets						1a(2)		No
<b>b</b> Oth	er trans	actions								
(1)	Sales	of assets to a noncha	rıtable exem	pt organization				1b(1)		No
(2)	Purcha	ses of assets from a	noncharıtabl	e exempt organization				1b(2)		No
(3)	Rental	of facilities, equipme	nt, or other a	ssets				1b(3)		No
(4)	Reımbu	ırsement arrangemer	nts					1b(4)		No
(5)	Loans	or loan guarantees.						1b(5)		No
(6)	Perform	ance of services or n	nembership c	r fundraising solicitations.				1b(6)		No
<b>c</b> Sha	ring of fa	acılıtıes, equipment,	mailing lists,	other assets, or paid emplo	yees	S		1c		No
of tl	he goods	s, other assets, or se	rvices given	mplete the following schedu by the reporting foundation now in column ( <b>d)</b> the value	Ifth	ne foundation received les	s than fair marke	et value		
(a) Line	No	(b) Amount involved	(c) Name of	noncharitable exempt organization	+	(d) Description of transfers, t	ransactions, and sha	ring arra	ngemer	nts
					-					
					+					
					+					
-					_					
					+					
					+					
					+					
des	crıbed ır	•	he Code (otho schedule	ed with, or related to, one or er than section 501(c)(3)) o (b) Type of organi	r in :	section 527?		.厂Y€ onship	s F	No
	the be	st of my knowledge a	and belief, it i	at I have examined this retu s true, correct, and complet er has any knowledge						
	Sı	gnature of officer or t	rustee			Date	Title			
Sign Here			ey D Haskell			Date 2011-05-12	Check if self- employed ▶	PTIN		
)ig	2° ₹	Signature <b>F</b>				2011-03-12				
•,	Paid Preparer's Use Only	Firm's name 🕨		Foundation Source			Firm's EIN ►			
	≛̃⊃ຶ			55 Walls Drive						
		Firm's address 🕨		Fairfield, CT 06824			Phone no (800	) 839-	1754	

**Software ID:** 10000149 **Software Version:** 2010.2.15

**EIN:** 20-8067422

Name: The Loftus Family Foundation

Part VI Line 7 - Tax Paid Original Return: 900

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

Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	A mount
Name and address (home or business)	any foundation manager or substantial contributor	recipient		
a Paid during the year				
ADVOCATES FOR FAITH FREEDOM INC	N/A	509(a)(1)	General Unrestricted	5,000
24910 LAS BRISAS RD MURRIETA,CA 92562				
AMERICAN CANCER SOCIETY 10501 EUCLID AVE CLEVELAND, OH 44106	N/A	509(a)(1)	Pan Ohio Hope Ride Program	1,000
AMERICAN LIVER FOUNDATION 1425 POMPTON AVE CEDAR GROVE,NJ 07009	N/A	509(a)(1)	Charitable Event	1,000
BARNABAS GROUP INC 2322 N BATAVIA ST STE 108 ORANGE,CA 92865	N/A	509(a)(1)	General Unrestricted	1,500
BILLY GRAHAM EVANGELISTIC ASSOCIATI PO BOX 668129 CHARLOTTE,NC 28266	N/A	509(a)(1)	General Unrestricted	10,000
BOYS AND GIRLS CLUB OF SANTA ANA IN 950 HIGHLAND ST SANTA ANA,CA 92703	N/A	509(a)(2)	General Unrestricted	1,000
CAMPUS CRUSADE FOR CHRIST INT'L 100 LAKE HART DR 3500 ORLANDO,FL 32832	N/A	509(a)(1)	Global Media Outreach Program	38,000
CHILDFUND INTERNATIONAL INC 2821 EMERYWOOD PKWY RICHMOND, VA 23294	N/A	509(a)(2)	General Unrestricted	1,252
COMMITTEE FOR A CONSTRUCTIVE TOMORR PO BOX 65722 WASHINGTON, DC 20035	N/A	509(a)(1)	General Unrestricted	10,000
COMMUNITY BIBLE STUDY 790 STOUT RD COLORADO SPGS, CO 80921	N/A	509(a)(1)	General Unrestricted	1,150
FREE WHEELCHAIR MISSION 9341 IRVINE BLVD IRVINE,CA 92618	N/A	509(a)(1)	General Unrestricted	1,000
LONG BEACH CHRISTIAN REFORMED CHURC 5559 E WARDLOW RD LONG BEACH, CA 90808	N/A	509(a)(1)	Cadet Club Program	3,000
MARINERS CHURCH 5001 NEWPORT COAST DR IRVINE,CA 92603	N/A	509(a)(1)	General Unrestricted	80,000
MARK THALLANDER FOUNDATION 281 SO MADISON AVE PASADENA,CA 91101	N/A	509(a)(1)	General Unrestricted	1,000
NEWPORT BEACH 1ST BATTALION 1ST MAR 2 SAN JOAQUIN PLZ STE 240 NEWPORT BEACH,CA 92660	N/A	509(a)(1)	General Unrestricted	1,000
Total			▶ 3a	319,652

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

CITIE DE CITE CONTRACTOR CONTRACT	into una contributiono	ala balling t	ne rear of Approved for i	atare rayment
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	A mount
Name and address (home or business)	any foundation manager or substantial contributor	recipient		
a Paid during the year				
PACIFIC CHORALE 3621 S HARBOR BLVD SANTA ANA,CA 92704	N/A	509(a)(2)	General Unrestricted	20,000
PACIFIC CHORALE 3621 S HARBOR BLVD SANTA ANA,CA 92704	N/A	509(a)(2)	Charitable Event	10,000
PACIFIC SYMPHONY 3631 S HARBOR BLVD STE 100 SANTA ANA,CA 92704	N/A	509(a)(2)	General Unrestricted	30,000
PRIORITY LIVING INC 2322 N BATAVIA ST STE 108 ORANGE,CA 92865	N/A	509(a)(1)	General Unrestricted	10,000
PRIORITY LIVING INC 2322 N BATAVIA ST STE 108 ORANGE,CA 92865	N/A	509(a)(1)	Baynes - France Project	9,500
PUGS N PALS OF SOUTHERN CALIFORNIA PO BOX 9343 NEWPORT BEACH,CA 92658	N/A	509(a)(2)	General Unrestricted	1,000
ROSEWOOD CHRISTIAN REFORMED CHURCH 10155 ROSE ST BELLFLOWER, CA 90706	N/A	509(a)(1)	Haiti Relief Mission Project	1,750
SAMARITANS PURSE PO BOX 3000 BOONE,NC 28607	N/A	509(a)(1)	General Unrestricted	10,000
SAMARITANS PURSE PO BOX 3000 BOONE,NC 28607	N/A	509(a)(1)	Haiti Relief Program	10,000
SOUTHERN CALIFORNIA CHILDRENS CHORA 5020 CAMPUS DR NEWPORT BEACH,CA 92660	N/A	509(a)(1)	General Unrestricted	25,000
SOUTHWEST COMMUNITY CHURCH 77701 FRED WARING DR INDIAN WELLS, CA 92210	N/A	509(a)(1)	General Unrestricted	4,000
ST ANDREWS PRESBYTERIAN CHURCH 600 SAINT ANDREWS RD NEWPORT BEACH,CA 92663	N/A	509(a)(1)	General Unrestricted	10,000
ST ANDREWS PRESBYTERIAN CHURCH 600 SAINT ANDREWS RD NEWPORT BEACH, CA 92663	N/A	509(a)(1)	Friends of Music Fund	2,500
STANFORD UNIVERSITY GRADUATE SCHOOL OFC OF DEVELOPMENT RM S239 518 MEMO STANFORD, CA 94305	N/A	509(a)(1)	James C Van Horne Fund for Finance Faculty	20,000
Total				319,652

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## **TY 2010 General Explanation Attachment**

Name: The Loftus Family Foundation

**EIN:** 20-8067422

**Software ID:** 10000149

ldentifier	Return Reference	Explanation
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## **TY 2010 Investments Corporate Stock Schedule**

Name: The Loftus Family Foundation

**EIN:** 20-8067422

**Software ID:** 10000149

Name of Stock	End of Year Book Value	End of Year Fair Market Value
160 shares of ARCELOR MITTAL MT	10,009	6,102
5000 shares of BYD CO LTD UNSP/ADR BYDDY.PK	67,893	52,850
140 shares of CERADYNE, INC COMMON STOCK CRDN	10,040	4,414
180 shares of CROCS INC CROX	9,967	3,082
984 shares of FRONTIER COMMUNICATIONS CORP FTR	7,367	9,574
1500 shares of ISHARES FTSE CHINA 25 INDEX FUND FXI	68,078	64,635
1650 shares of ISHARES MSCI PACIFIC EX-JAPAN EPP	71,380	77,517
364 shares of MICROSOFT CORPORATION MSFT	10,545	10,161
400 shares of MOBILE TELSYS OJSC MBT	9,976	8,348
185 shares of NIKE INC-CL B NKE	10,611	15,789
37692 shares of PIMCO ALL ASSET FUND INSTITUTIONAL CLASS PAAIX	438,134	454,192
2021 shares of PIMCO ENHANCED SHORT MATURITY STRATGY FD COMMON ST MINT	202,092	203,486
40054 shares of PIMCO GLOBAL MULTI-ASSET FUND INSTI CLASS PGAIX	399,224	465,833
7099 shares of SELECT SECTOR SPDR UTILITIES XLU	211,166	222,490
2500 shares of STREETTRACKS GOLD SHARES GLD	266,124	346,800
1600 shares of TOTAL FINA ELF S.A. TOT	74,647	85,568
4100 shares of VERIZON COMMUNICATIONS VZ	112,134	146,698
480 shares of WESTERN DIGITAL CORP WDC	10,046	16,272

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# TY 2010 Investments Government Obligations Schedule

Name: The Loftus Family Foundation

**EIN:** 20-8067422

**Software ID:** 10000149

**Software Version:** 2010.2.15

**US Government Securities - End of** 

Year Book Value: 322,282

**US Government Securities - End of** 

**Year Fair Market Value:** 356,536

State & Local Government

**Securities - End of Year Book** 

Value:

**State & Local Government Securities - End of Year Fair** 

**Market Value:** 

## **TY 2010 Other Expenses Schedule**

Name: The Loftus Family Foundation

**EIN:** 20-8067422

**Software ID:** 10000149

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Administrative Fees	30,254			30,254
Bank Charge Reversal	-16	-16		

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### **TY 2010 Other Income Schedule**

Name: The Loftus Family Foundation

**EIN:** 20-8067422

**Software ID:** 10000149

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Federal Tax Refund	2,218		

### **TY 2010 Taxes Schedule**

Name: The Loftus Family Foundation

**EIN:** 20-8067422

**Software ID:** 10000149

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Estimated tax for 2010	200	0	0	0
Foreign Tax Paid	1,274	1,274	0	0