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

OMB No 1545-0052

**2010**Department of the Treasury  
Internal Revenue Service

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

**For calendar year 2010, or tax year beginning , 2010, and ending**

**G** Check all that apply: ☐ Initial return ☐ Initial Return of a former public charity ☐ Final return  
☐ Amended return ☐ Address change ☐ Name change

STEPHEN & MARY BIRCH FOUNDATION, INC.  
103 FOULK ROAD, #200  
WILMINGTON, DE 19803

**A** Employer identification number

22-1713022

**B** Telephone number (see the instructions)

888-372-6303

**C** If exemption application is pending, check here ☐**D 1** Foreign organizations, check here ☐**2** Foreign organizations meeting the 85% test, check here and attach computation ☐**E** If private foundation status was terminated under section 507(b)(1)(A), check here ☐**F** If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

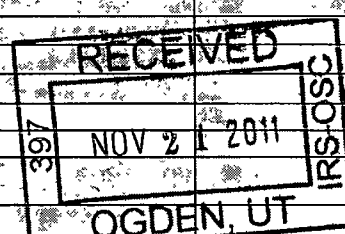
**H** Check type of organization ☒ Section 501(c)(3) exempt private foundation  
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

**I** Fair market value of all assets at end of year (from Part II, column (c), line 16) **J** Accounting method. ☒ Cash ☐ Accrual  
☐ Other (specify) \_\_\_\_\_

► \$ 198,678,352.

(Part I, column (d) must be on cash basis)

<b>Part I Analysis of Revenue and Expenses</b> (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>REVENUE</b>	<b>1</b> Contributions, gifts, grants, etc., received (att sch)				
	<b>2</b> Ck ► <input checked="" type="checkbox"/> if the foundn is not req to att Sch B				
	<b>3</b> Interest on savings and temporary cash investments	129,471.	129,471.		
	<b>4</b> Dividends and interest from securities	421,892.	421,892.		
	<b>5a</b> Gross rents				
	<b>b</b> Net rental income or (loss)				
	<b>6a</b> Net gain/(loss) from sale of assets not on line 10	-17,695.			
	<b>b</b> Gross sales price for all assets on line 6a	31,546,667.			
	<b>7</b> Capital gain net income (from Part IV, line 2)		0.		
	<b>8</b> Net short-term capital gain				
	<b>9</b> Income modifications				
	<b>10a</b> Gross sales less returns and allowances				
<b>b</b> Less Cost of goods sold					
<b>c</b> Gross profit/(loss) (att sch)					
<b>11</b> Other income (attach schedule)					
See Statement 1	39,600.	39,600.			
<b>12 Total.</b> Add lines 1 through 11	573,268.	590,963.	0.		
<b>EXPENSES</b>	<b>13</b> Compensation of officers, directors, trustees, etc	774,612.	77,461.		697,151.
	<b>14</b> Other employee salaries and wages				
	<b>15</b> Pension plans, employee benefits				
	<b>16a</b> Legal fees (attach schedule) See St 2	177,156.	159,564.		17,592.
	<b>b</b> Accounting fees (attach sch) See St 3	22,416.	2,242.		20,174.
	<b>c</b> Other prof fees (attach sch)				
	<b>17</b> Interest				
	<b>18</b> Taxes (attach schedule)(see instr) See Stm 4	197,782.	184,853.		12,330.
	<b>19</b> Depreciation (attach sch) and depletion	42,584.			
	<b>20</b> Occupancy				
	<b>21</b> Travel, conferences, and meetings	98,804.	88,924.		9,880.
	<b>22</b> Printing and publications				
<b>23</b> Other expenses (attach schedule)					
See Statement 5	1,614,170.	1,570,179.		43,991.	
<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23	2,927,524.	2,083,223.		801,118.	
<b>25</b> Contributions, gifts, grants paid Part XV	10,477,734.			10,477,734.	
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	13,405,258.	2,083,223.	0.	11,278,852.	
<b>27</b> Subtract line 26 from line 12:					
<b>a Excess of revenue over expenses and disbursements</b>	-12,831,990.				
<b>b Net investment income</b> (if negative, enter -0-)		0.			
<b>c Adjusted net income</b> (if negative, enter -0-)			0.		



5P

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
ASSETS	1	Cash — non-interest-bearing				
	2	Savings and temporary cash investments		102,033,199.	90,168,124.	90,168,124.
	3	Accounts receivable				
		Less: allowance for doubtful accounts				
	4	Pledges receivable				
		Less: allowance for doubtful accounts				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)				
	7	Other notes and loans receivable (attach sch)	1,145,276.	Statement 6		
		Less: allowance for doubtful accounts		1,145,276.	1,145,276.	1,145,276.
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments — U.S. and state government obligations (attach schedule)	Statement 7	33,529,862.	44,692,739.	44,574,189.
	b	Investments — corporate stock (attach schedule)	Statement 8	16,576.	16,576.	18,744.
	c	Investments — corporate bonds (attach schedule)	Statement 9	15,194,514.	1,975,025.	1,977,505.
	LIABILITIES	11	Investments — land, buildings, and equipment basis	16,022,421.		
		Less: accumulated depreciation (attach schedule)	See Stmt 10	15,844,399.	16,022,421.	22,858,814.
12		Investments — mortgage loans				
13		Investments — other (attach schedule)	Statement 11	29,279,020.	30,214,506.	37,489,798.
14		Land, buildings, and equipment basis	666,033.			
		Less: accumulated depreciation (attach schedule)	See Stmt 12	442,443.	445,902.	445,902.
15		Other assets (describe)		27,270.		
16		Total assets (to be completed by all filers — see instructions. Also, see page 1, item I)		197,512,559.	184,680,569.	198,678,352.
17		Accounts payable and accrued expenses				
18		Grants payable				
NET FUND ASSETS OR BALANCES	19	Deferred revenue				
	20	Loans from officers, directors, trustees, & other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe)				
	23	Total liabilities (add lines 17 through 22)		0.	0.	
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.	<input type="checkbox"/>			
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.	<input checked="" type="checkbox"/>			
27	Capital stock, trust principal, or current funds		48,622.	48,622.		
28	Paid-in or capital surplus, or land, building, and equipment fund					
29	Retained earnings, accumulated income, endowment, or other funds		197,463,937.	184,631,947.		
30	Total net assets or fund balances (see the instructions)		197,512,559.	184,680,569.		
31	Total liabilities and net assets/fund balances (see the instructions)		197,512,559.	184,680,569.		

## Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year — Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	197,512,559.
2	Enter amount from Part I, line 27a	2	-12,831,990.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	184,680,569.
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) — Part II, column (b), line 30	6	184,680,569.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shares MLC Company)

(b) How acquired  
P — Purchase  
D — Donation(c) Date acquired  
(month, day, year)(d) Date sold  
(month, day, year)

1a See Statement 13			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div style="border: 1px solid black; padding: 2px;">           If gain, also enter in Part I, line 7            If (loss), enter -0- in Part I, line 7         </div>	2	-17,695.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div style="border: 1px solid black; padding: 2px;">           If gain, also enter in Part I, line 8, column (c) (see the instructions) If (loss), enter -0- in Part I, line 8         </div>	3	0.

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes☒ No

If 'Yes,' the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2009	12,253,423.	192,537,019.	0.063642
2008	12,302,533.	221,557,021.	0.055528
2007	10,110,766.	162,095,491.	0.062375
2006	11,469,497.	189,771,290.	0.060439
2005	7,043,709.	138,451,823.	0.050875

2 Total of line 1, column (d)	2	0.292859
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.058572
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	192,432,535.
5 Multiply line 4 by line 3	5	11,271,158.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	
7 Add lines 5 and 6	7	11,271,158.
8 Enter qualifying distributions from Part XII, line 4	8	11,278,852.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

**Part VII Excise Tax Based on Investment Income** (Section 4940(a), 4940(b), 4940(e), or 4948 — see the instructions)

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1. Date of ruling or determination letter. _____ (attach copy of letter if necessary — see instr.)		1	0.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-.		5	0.
6 Credits/Payments			
a 2010 estimated tax pmts and 2009 overpayment credited to 2010	6a 60,148.		
b Exempt foreign organizations — tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	60,148.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	60,148.	
11 Enter the amount of line 10 to be: Credited to 2011 estimated tax <input checked="" type="checkbox"/> 60,148. Refunded <input type="checkbox"/>	11	0.	

**Part VII-A Statements Regarding Activities**

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?		X
If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XIV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) DE CA		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If 'No,' attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If 'Yes,' complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses.		X

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Form 990-PF (2010)

**Part VII-A Statements Regarding Activities (Continued)**

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>ROSE PATEK</u> Telephone no. <u>888-372-6303</u> Located at <u>103 FOULK ROAD, SUITE 200 WILMINGTON DE</u> ZIP + 4 <u>19803</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>			
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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If 'Yes,' enter the name of the foreign country <u></u>	16	Yes	No X

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**

File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see the instructions)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
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)	3b	N/A
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

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Form 990-PF (2010)

**Part VII-B** Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is 'Yes' to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

N/A

Organizations relying on a current notice regarding disaster assistance check here

☐

c If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A ☐ Yes ☐ No

If 'Yes,' attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

If 'Yes' to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ROSE PATEK 103 FOULK ROAD, SUITE 200 WILMINGTON, DE 19803	President/Tr 30.00	299,806.	0.	0.
DEBRA D DURKIN 103 FOULK ROAD, SUITE 200 WILMINGTON, DE 19803	VP/Secretary 30.00	299,806.	0.	0.
CHRISTOPHER PATEK 103 FOULK ROAD, SUITE 200 WILMINGTON, DE 19803	VP 10.00	175,000.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1— see instructions). If none, enter 'NONE.'

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
None				

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

0

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Form 990-PF (2010)

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE'.

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
BERKOWITZ LICHTSTEIN 443 NORTHFIELD AVE WEST ORANGE, NJ 07052	LEGAL SERVICES	175,920.
Total number of others receiving over \$50,000 for professional services		0

**Part IX-A** Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A	
2	
3	
4	

**Part IX-B** Summary of Program-Related Investments (see instructions)

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

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Form 990-PF (2010)



**Part X** Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
a	Average monthly fair market value of securities	1a	47,499,437.
b	Average of monthly cash balances	1b	100,102,414.
c	Fair market value of all other assets (see instructions)	1c	47,761,129.
d	<b>Total</b> (add lines 1a, b, and c)	1d	195,362,980.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	195,362,980.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	2,930,445.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	192,432,535.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	9,621,627.

**Part XI** Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	9,621,627.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	9,621,627.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	9,621,627.
6	Deduction from distributable amount (see instructions)	6	
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	9,621,627.

**Part XII** Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1a	11,278,852.
b	Program-related investments — total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	11,278,852.
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 instructions)	5	
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	11,278,852.

**Note.** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

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Form 990-PF (2010)

**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				9,621,627.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			0.	
b Total for prior years 20__, 20__, 20__		0.		
3 Excess distributions carryover, if any, to 2010				
a From 2005				
b From 2006				
c From 2007	1,934,506.			
d From 2008	1,295,658.			
e From 2009	2,629,538.			
f Total of lines 3a through e	5,859,702.			
4 Qualifying distributions for 2010 from Part XII, line 4 ▶ \$ 11,278,852.				
a Applied to 2009, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2010 distributable amount				9,621,627.
e Remaining amount distributed out of corpus	1,657,225.			
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e. Subtract line 5	7,516,927.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount — see instructions		0.		
e Undistributed income for 2009 Subtract line 4a from line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2010 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	7,516,927.			
10 Analysis of line 9				
a Excess from 2006				
b Excess from 2007	1,934,506.			
c Excess from 2008	1,295,658.			
d Excess from 2009	2,629,538.			
e Excess from 2010	1,657,225.			

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Form 990-PF (2010)



**Part XV** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<i>a Paid during the year</i> See Statement 15				
<b>Total</b>			<b>3a</b>	10,477,734.
<i>b Approved for future payment</i>				
<b>Total</b>			<b>3b</b>	

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

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		
1	Program service revenue:					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	129,471.	
4	Dividends and interest from securities			14	421,892.	
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					-17,695.
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue					
a	RENTAL INCOME			16	39,600.	
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)				590,963.	-17,695.
13	Total. Add line 12, columns (b), (d), and (e)				13	573,268.

(See worksheet in line 13 instructions to verify calculations)

## **Part XVI B Relationship of Activities to the Accomplishment of Exempt Purposes**

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22-1713022

11/12/11

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**Statement 1**  
**Form 990-PF, Part I, Line 11**  
**Other Income**

	(a) Revenue per Books	(b) Net Investment Income	(c) Adjusted Net Income
RENTAL INCOME	\$ 39,600.		
Total	\$ 39,600.	\$ 0.	\$ 0.

**Statement 2**  
**Form 990-PF, Part I, Line 16a**  
**Legal Fees**

	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
BERKOWITZ, KURITSKY GUISALLO HANDLER & LEVINE LLC	\$ 175,920. 1,236.	\$ 158,328. 1,236.		\$ 17,592.
Total	\$ 177,156.	\$ 159,564.	\$ 0.	\$ 17,592.

**Statement 3**  
**Form 990-PF, Part I, Line 16b**  
**Accounting Fees**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
WINNIE HUANG ACCOUNTANCY CORP	\$ 22,416.	\$ 2,242.		\$ 20,174.
Total	\$ 22,416.	\$ 2,242.	\$ 0.	\$ 20,174.

**Statement 4**  
**Form 990-PF, Part I, Line 18**  
**Taxes**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
PAYROLL TAX	\$ 13,700.	\$ 1,370.		\$ 12,330.
PROPERTY TAXES	183,483.	183,483.		
STATE TAX	599.			
Total	\$ 197,782.	\$ 184,853.	\$ 0.	\$ 12,330.

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22-1713022

11/12/11

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**Statement 5**  
**Form 990-PF, Part I, Line 23**  
**Other Expenses**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
AUTO EXPENSES	\$ 1,945.	\$ 1,751.		\$ 194.
BANK CHARGE	709.	638.		71.
INSURANCE -BUSINESS	5,338.	4,804.		534.
INSURANCE -PROPERTY	78,045.	78,045.		
INSURANCE-DIRECTORS	10,800.	9,720.		1,080.
INVESTMENT EXPENSES	71,193.	71,193.		
LANDSCAPING	48,253.	43,428.		4,825.
LICENSE AND PERMIT	1,594.	1,435.		159.
PAYROLL EXPENSE FEES	1,685.	169.		1,516.
PORTFOLIO DEDUCTION - U.E. K-1	1,038,479.	1,038,479.		
POSTAGE AND DELIVERY	3,821.	3,439.		382.
Rental Expenses	19,821.	17,839.		1,982.
REPAIRS & MAINTENANCE	28,640.	25,776.		2,864.
SECURITY	166,831.	150,148.		16,683.
STORAGE	3,276.	2,948.		328.
TELEPHONE	21,363.	19,227.		2,136.
TEMPORARY LABOR	38,950.	35,055.		3,895.
UTILITIES	61,652.	55,487.		6,165.
WASTE DISPOSAL	11,775.	10,598.		1,177.
Total	<u>\$ 1,614,170.</u>	<u>\$ 1,570,179.</u>	<u>\$ 0.</u>	<u>\$ 43,991.</u>

**Statement 6**  
**Form 990-PF, Part II, Line 7**  
**Other Notes and Loans Receivable**

Notes and Loans Reported Separately	Book Value	Fair Market Value	Doubtful Accounts Allowance
Borrower's Name: MARIAN COMMUNITY 501(C) (3) ORG			
Borrower's Title:			
Date of Note:			
Maturity Date:			
Repayment Terms:			
Interest Rate:			
Security Provided:			
Purpose of Loan:			
Borrower Relationship: NONE			
Consideration:			
Consideration FMV:			
Original Amount:			
Balance Due:	\$ 1,145,276.	\$ 1,145,276.	
Doubtful Acct. Allow.:			\$ 0.
Total	<u>\$ 1,145,276.</u>	<u>\$ 1,145,276.</u>	
Allowance for Doubtful Accounts			\$ 0.
Net Other Notes/Loans Rec. - Book Value			<u>\$ 1,145,276.</u>



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22-1713022

11/12/11

03:48PM

**Statement 7**  
**Form 990-PF, Part II, Line 10a**  
**Investments - U.S. and State Government Obligations**

<u>U.S. Government Obligations</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
GENERAL ELEC CAP CORP 1.62% DUE 1/7/2011	Mkt Val	\$ 799,456.	\$ 800,056.
MORGAN STANLEY 2% NOTE DUE 9/22/2011	Mkt Val	1,016,460.	1,012,230.
REGIONS BANK 3.25% NOTE DUE 12/9/2011	Mkt Val	1,410,953.	1,385,816.
STATE STREET CORP VAR % DUE 9/15/2011	Mkt Val	1,015,575.	1,011,656.
SUNTRUST BANK 3% DUE 11/16/2011	Mkt Val	1,404,203.	1,380,794.
WELLS FARGO & CO 3% DUE 12/9/2011	Mkt Val	1,241,568.	1,229,052.
US TREASURY NOTE 2.375% DUE 4/15/2011	Mkt Val	1,113,550.	1,112,180.
US TREASURY NOTE 4.625% DUE 8/31/2011	Mkt Val	1,603,828.	1,542,885.
US TREASURY NOTE 1.75% DUE 11/15/2011	Mkt Val	1,526,601.	1,518,510.
US TREASURY NOTE 0.875% DUE 1/31/2011	Mkt Val	1,498,359.	1,500,690.
US TREASURY NOTE 0.875% DUE 3/31/2011	Mkt Val	1,497,246.	1,502,340.
US TREASURY 1% DUE 10/31/2011	Mkt Val	1,505,684.	1,508,430.
US TREASURY NOTE 1% DUE 9/30/2011	Mkt Val	1,750,205.	1,759,293.
GOVT NATL MTG ASSN 3.957% DUE 6/16/2031	Mkt Val	205,868.	209,557.
GOVT NATL MTG ASSN 5.5% DUE 3/20/2034	Mkt Val	153,411.	152,009.
USA TREASURY NOTES 1.125% DUE 12/15/2011	Mkt Val	806,375.	806,000.
USA TREASURY NOTES 1.125% DUE 1/15/2012	Mkt Val	1,009,258.	1,007,810.
USA TREASURY NOTES 0.875% DUE 2/28/2011	Mkt Val	1,005,121.	1,000,930.
USA TREASURY NOTES 0.875% DUE 4/30/2011	Mkt Val	2,512,699.	2,505,450.
USA TREASURY NOTE 0.875% DUE 5/31/2011	Mkt Val	2,491,953.	2,507,025.
USA TREASURY NOTE 1.125% DUE 6/30/2011	Mkt Val	2,016,332.	2,009,060.
USA TREASURY NOTES 1% DUE 7/31/2011	Mkt Val	2,013,753.	2,008,740.
USA TREASURY NOTE 1% DUE 8/31/2011	Mkt Val	2,215,285.	2,211,000.
USA TREASURY NOTES 1.375% DUE 11/15/2012	Mkt Val	1,526,309.	1,522,260.
USA TREASURY NOTES 1.125% DUE 12/15/2012	Mkt Val	2,723,160.	2,727,405.
USA TREASURY NOTES 1% DUE 12/31/2011	Mkt Val	2,014,141.	2,012,800.
USA TREASURY NOTES 0.875% DUE 2/29/2012	Mkt Val	997,324.	1,005,620.
USA TREASURY NOTE 1% DUE 3/31/2012	Mkt Val	1,748,272.	1,763,388.
USA TREASURY NOTE 0.625% DUE 7/31/2012	Mkt Val	500,801.	501,250.
USA TREASURY NOTES 0.375% DUE 9/30/2012	Mkt Val	999,180.	997,650.
JOHN DEERE CAPITAL 2.875% DUE 6/19/2012	Mkt Val	935,720.	930,230.
JPMORGAN CHASE & CO	Mkt Val	1,434,089.	1,432,073.
		\$ 44,692,739.	\$ 44,574,189.
	Total	\$ 44,692,739.	\$ 44,574,189.

**Statement 8**  
**Form 990-PF, Part II, Line 10b**  
**Investments - Corporate Stocks**

<u>Corporate Stocks</u>	<u>Valuation Method</u>	<u>Book Value</u>	<u>Fair Market Value</u>
485.094 LIBERTY/COLUMBIA SAML CAP VAL C	Mkt Val	\$ 16,576.	\$ 18,744.
	Total	\$ 16,576.	\$ 18,744.

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22-1713022

11/12/11

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**Statement 9**  
**Form 990-PF, Part II, Line 10c**  
**Investments - Corporate Bonds**

Corporate Bonds	Valuation Method	Book Value	Fair Market Value
US.CENTRAL FED CREDIT 1.25% DUE 10/19/11	Mkt Val	\$ 949,515.	\$ 956,565.
STATE STREET CAPITAL 2.15% DUE 4/30/2012	Mkt Val	1,025,510.	1,020,940.
	Total	<u>\$ 1,975,025.</u>	<u>\$ 1,977,505.</u>

**Statement 10**  
**Form 990-PF, Part II, Line 11**  
**Investments - Land, Buildings, and Equipment**

Category	Basis	Accum. Deprec.	Book Value	Fair Market Value
Land	\$ 16,022,421.		\$ 16,022,421.	\$ 22,858,814.
Total	<u>\$ 16,022,421.</u>	<u>\$ 0.</u>	<u>\$ 16,022,421.</u>	<u>\$ 22,858,814.</u>

**Statement 11**  
**Form 990-PF, Part II, Line 13**  
**Investments - Other**

Other Investments	Valuation Method	Book Value	Fair Market Value
LUNA LUNA ASSETS FOR EXHIBIT	Mkt Val	\$ 14,178,661.	\$ 14,178,661.
U.E. LTD	Mkt Val	9,735,845.	15,660,000.
MORGAN STANLEY - ANNUITY	Mkt Val	1,000,000.	1,270,228.
MORGAN STANLEY - ANNUITY	Mkt Val	1,000,000.	1,270,228.
MORGAN STANLEY - ANNUITY	Mkt Val	1,000,000.	1,270,227.
MORGAN STANLEY - ANNUITY	Mkt Val	1,000,000.	1,270,227.
MORGAN STANLEY - ANNUITY	Mkt Val	1,000,000.	1,270,227.
NOTE RECEIVABLES	Cost	1,300,000.	1,300,000.
	Total	<u>\$ 30,214,506.</u>	<u>\$ 37,489,798.</u>

**Statement 12**  
**Form 990-PF, Part II, Line 14**  
**Land, Buildings, and Equipment**

Category	Basis	Accum. Deprec.	Book Value	Fair Market Value
Auto./Transportation Equip.	\$ 183,234.	\$ 116,617.	\$ 66,617.	\$ 66,617.
Furniture and Fixtures	46,043.	0.	46,043.	46,043.
Machinery and Equipment	1,987.	1,987.	0.	0.
Buildings	348,660.	86,771.	261,889.	333,242.
Improvements	86,109.	14,756.	71,353.	0.
Total	<u>\$ 666,033.</u>	<u>\$ 220,131.</u>	<u>\$ 445,902.</u>	<u>\$ 445,902.</u>

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22-1713022

11/12/11

03 48PM

**Statement 13**  
**Form 990-PF, Part IV, Line 1**  
**Capital Gains and Losses for Tax on Investment Income**

Item	(a) Description	(b) How Acquired	(c) Date Acquired	(d) Date Sold
1	MORGAN STANLEY CAP GAIN DISTRIBUTION	Purchased	Various	Various
2	1665.39 GOVT NATL MTG ASSN SERIES 2007-12	Purchased	1/07/2009	1/01/2010
3	67624.36 GOVT NATL MTG ASSN SERIES 2008-72	Purchased	1/06/2009	1/01/2010
4	1500000 US TREASURY NOTE DTD 3/15/05 DUE 3/15/10	Purchased	6/19/2009	3/15/2010
5	1500000 US TREASURY NOTE DTD 4/15/05 DUE 4/15/10	Purchased	7/14/2009	4/15/2010
6	1500000 USA TREASURY BOND 2.875% DUE 6/30/2010	Purchased	7/14/2009	6/30/2010
7	1500000 USA TREASURY NOTE 3.625% DUE 1/15/2010	Purchased	4/29/2009	1/15/2010
8	2500000 USA TREASURY NOTES 2.125% DUE 1/31/2010	Purchased	5/15/2009	1/31/2010
9	1350000 USA TREASURY NOTES 2.125% DUE 4/30/2010	Purchased	11/19/2009	4/30/2010
10	1000000 USA TREASURY NOTES 2.75% DUE 7/31/2010	Purchased	3/17/2010	7/31/2010
11	1500000 USA TREASURY NOTES 3.5% DUE 2/15/2010	Purchased	4/29/2009	2/15/2010
12	1000000 USA TREASURY NOTES 3.625% DUE 6/15/2010	Purchased	2/09/2010	6/15/2010
13	1500000 USA TREASURY NOTES USN	Purchased	2/08/2010	9/30/2010
14	1250000 AMERICAN EXPRESS BK FSB FDIC TERM NOTE	Purchased	1/05/2009	12/10/2010
15	1250000 BANK OF AMERICA NA FDIC GUARANTEED	Purchased	1/05/2009	12/23/2010
16	900000 BANK OF AMERICA NA FDIC GUARNT SERIES 1	Purchased	1/07/2009	12/23/2010
17	1300000 CITIGROUP FUNDING INC FDIC GTD	Purchased	1/23/2009	7/30/2010
18	1350000 GOLDMAN SACHS GROUP INC FDIC GTD	Purchased	1/14/2009	12/03/2010
19	586.78 GOVT NATL MTG ASSN SERIES 2007-12	Purchased	1/07/2009	2/01/2010
20	589.69 GOVT NATL MTG ASSN SERIES 2007-12	Purchased	1/07/2009	3/01/2010
21	12272.81 GOVT NATL MTG ASSN SERIES 2007-12	Purchased	1/07/2009	4/01/2010
22	588.5 GOVT NATL MTG ASSN SERIES 2007-12	Purchased	1/07/2009	5/01/2010
23	591.42 GOVT NATL MTG ASSN SERIES 2007-12	Purchased	1/07/2009	6/01/2010
24	594.34 GOVT NATL MTG ASSN SERIES 2007-12	Purchased	1/07/2009	7/01/2010
25	597.28 GOVT NATL MTG ASSN SERIES 2007-12	Purchased	1/07/2009	8/01/2010
26	600.24 GOVT NATL MTG ASSN SERIES 2007-12	Purchased	1/07/2009	9/01/2010
27	603.21 GOVT NATL MTG ASSN SERIES 2007-12	Purchased	1/07/2009	10/01/2010
28	603.15 GOVT NATL MTG ASSN SERIES 2007-12	Purchased	1/07/2009	11/01/2010
29	612.26 GOVT NATL MTG ASSN SERIES 2007-12	Purchased	1/07/2009	12/01/2010
30	26550.96 GOVT NATL MTG ASSN SERIES 2008-72	Purchased	1/06/2009	2/01/2010
31	39610.35 GOVT NATL MTG ASSN SERIES 2008-72	Purchased	1/06/2009	3/01/2010
32	25216.73 GOVT NATL MTG ASSN SERIES 2008-72	Purchased	1/06/2009	4/01/2010
33	21474.69 GOVT NATL MTG ASSN SERIES 2008-72	Purchased	1/06/2009	5/01/2010
34	23795.08 GOVT NATL MTG ASSN SERIES 2008-72	Purchased	1/06/2009	6/01/2010
35	23082.05 GOVT NATL MTG ASSN SERIES 2008-72	Purchased	1/06/2009	7/01/2010
36	33783.04 GOVT NATL MTG ASSN SERIES 2008-72	Purchased	1/06/2009	8/01/2010
37	29705.25 GOVT NATL MTG ASSN SERIES 2008-72	Purchased	1/06/2009	9/01/2010
38	25858.65 GOVT NATL MTG ASSN SERIES 2008-72	Purchased	1/06/2009	10/01/2010
39	22159.15 GOVT NATL MTG ASSN SERIES 2008-72	Purchased	1/06/2009	11/01/2010
40	24906.06 GOVT NATL MTG ASSN SERIES 2008-72	Purchased	1/06/2009	12/01/2010
41	1250000 JP MORGAN CHASE & CO GUARNT SERIES 1	Purchased	1/02/2009	12/01/2010
42	1000000 USA TREASURY NOTE 1.5% DUE 10/31/2010	Purchased	1/02/2009	10/31/2010

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22-1713022

11/12/11

03 48PM

**Statement 13 (continued)**  
**Form 990-PF, Part IV, Line 1**  
**Capital Gains and Losses for Tax on Investment Income**

Item	(a) Description	(b) How Acquired	(c) Date Acquired	(d) Date Sold
43	1500000 USA TREASURY NOTE 1.75% DUE 3/31/2010	Purchased	1/28/2009	3/31/2010
44	1000000 USA TREASURY NOTE 2.375% DUE 8/31/2010	Purchased	1/02/2009	8/31/2010
45	1000000 USA TREASURY NOTE 3.875% DUE 7/15/2010	Purchased	5/28/2009	7/15/2010
46	1500000 USA TREASURY NOTE 4.5% DUE 5/15/2010	Purchased	4/29/2009	5/15/2010
47	1000000 USA TREASURY NOTE 4.75% DUE 2/15/2010	Purchased	1/02/2009	2/15/2010
48	1000000 USA TREASURY NOTE 1.25% DUE 11/30/2010	Purchased	1/28/2009	11/30/2010
49	1000000 USA TREASURY NOTES USN	Purchased	1/02/2009	12/31/2010
50	SALE OF CATTLE	Purchased	1/01/2009	12/31/2010

Item	(e) Gross Sales	(f) Deprec. Allowed	(g) Cost Basis	(h) Gain (Loss)	(i) FMV 12/31/69	(j) Adj. Bas. 12/31/69	(k) Excess (i) - (j)	(l) Gain (Loss)
1	75.		0.	75.				\$ 75.
2	1,665.		1,673.	-8.				-8.
3	67,624.		73,312.	-5,688.				-5,688.
4	1500000.		1500000.	0.				0.
5	1500000.		1500000.	0.				0.
6	1500000.		1500000.	0.				0.
7	1500000.		1500000.	0.				0.
8	2500000.		2500000.	0.				0.
9	1350000.		1350000.	0.				0.
10	1000000.		1000000.	0.				0.
11	1500000.		1500000.	0.				0.
12	1000000.		1000000.	0.				0.
13	1500000.		1500000.	0.				0.
14	1250000.		1250000.	0.				0.
15	1250000.		1250000.	0.				0.
16	900,000.		900,000.	0.				0.
17	1300000.		1300000.	0.				0.
18	1350000.		1350000.	0.				0.
19	587.		590.	-3.				-3.
20	590.		593.	-3.				-3.
21	12,273.		12,331.	-58.				-58.
22	589.		591.	-2.				-2.
23	591.		594.	-3.				-3.
24	594.		597.	-3.				-3.
25	597.		600.	-3.				-3.
26	600.		603.	-3.				-3.
27	603.		606.	-3.				-3.
28	603.		606.	-3.				-3.
29	612.		615.	-3.				-3.
30	26,551.		28,784.	-2,233.				-2,233.
31	39,610.		42,942.	-3,332.				-3,332.
32	25,217.		27,338.	-2,121.				-2,121.
33	21,475.		23,281.	-1,806.				-1,806.
34	23,795.		25,796.	-2,001.				-2,001.
35	23,082.		25,023.	-1,941.				-1,941.
36	33,783.		36,625.	-2,842.				-2,842.
37	29,705.		32,204.	-2,499.				-2,499.

Client SMBF

STEPHEN &amp; MARY BIRCH FOUNDATION, INC.

22-1713022

11/12/11

03.48PM

**Statement 13 (continued)**  
**Form 990-PF, Part IV, Line 1**  
**Capital Gains and Losses for Tax on Investment Income**

Item	(e) Gross Sales	(f) Deprec. Allowed	(g) Cost Basis	(h) Gain (Loss)	(i) FMV 12/31/69	(j) Adj. Bas. 12/31/69	(k) Excess (i) - (j)	(l) Gain (Loss)
38	25,859.		28,034.	-2,175.				\$ -2,175.
39	22,159.		24,023.	-1,864.				-1,864.
40	24,906.		27,001.	-2,095.				-2,095.
41	1250000.		1250000.	0.				0.
42	1000000.		1000000.	0.				0.
43	1500000.		1500000.	0.				0.
44	1000000.		1000000.	0.				0.
45	1000000.		1000000.	0.				0.
46	1500000.		1500000.	0.				0.
47	1000000.		1000000.	0.				0.
48	1000000.		1000000.	0.				0.
49	1000000.		1000000.	0.				0.
50	12,922.		0.	12,922.				12,922.
Total								\$ -17,695.

**Statement 14**  
**Form 990-PF, Part XV, Line 2a-d**  
**Application Submission Information**

Name of Grant Program:  
Name: ROSE PATEK, PRESIDENT  
Care Of: STEPHEN AND MARY BIRCH FOUNDATION, INC  
Street Address: 103 FOULK ROAD, #200  
City, State, Zip Code: WILMINGTON, DE 19803  
Telephone: 888-372-6303  
Form and Content: NO SPECIFIC FORM BUT MUST INCLUDE FULL DESCRIPTION OF THE PROJECT, THE PURPOSE AND IMPLEMENTATION. ALSO REQUIRE IRS DETERMINATION LETTER, CURRENT FINANCIALS AND BUDGET.  
Submission Deadlines: NONE  
Restrictions on Awards: NONE

**Statement 15**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
HABITAT FOR HUMANITY 2800 N. HAMPTON ROAD DALLAS, TX 75212	NONE			\$ 25,000.

Client SMBF

STEPHEN &amp; MARY BIRCH FOUNDATION, INC.

22-1713022

11/12/11

03 48PM

**Statement 15 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
AMERICAN JEWISH COMMITTEE 165 E. 56TH STREET NEW YORK,, NY 10022	NONE			\$ 5,000.
BEBE'S HOUSE RR 2, BOX 503 LEXINGTON, TX 78947	NONE			5,000.
BLOOMFIELD COLLEGE & SEMINARY 467 FRANKLIN STREET BLOOMFIELD, NJ 07003	NONE			5,000.
CHULA VISTA HOST LIONS CLUB P.O. BOX 2304 CHULA VISTA, CA 91910	NONE			25,000.
CORNELL LAW SCHOOL P.O. BOX 686 ITHACA, NY 14853	NONE			30,000.
DAYTON VOLUNTEER FIRE DEPT WINTREE & COOK DAYTON, TX 77535	NONE			20,000.
DEVINE POLICE DEPARTMENT DEVINE, TX 78016	NONE			15,000.
DEVINE VOLUNTEER FIRE DEPT 202 E Herring AVE DEVINE, TX 78016	NONE			15,000.
MARIAN COMMUNITIES 154 SUMMER ST MEDWAY, MA 02053	NONE		UNUSUAL GRANT FOR CAPITAL PROJECT - BUILDING OF RETREAT CENTER	1,612,000.
METROPOLITAN OPERA ASSN INC 70 LINCOLN CTR PLAZA NEW YORK, NY 10025	NONE			15,000.
NEW JERSEY PERFORMING ARTS CTR ONE CENTER STREET NEWARK, NJ 07102	NONE			15,000.
NEW JERSEY SYMPHONY ORCHESTRA 2 CENTRAL AVENUE NEWARK, NJ 07102	NONE			10,000.

Client SMBF

STEPHEN &amp; MARY BIRCH FOUNDATION, INC.

22-1713022

11/12/11

03 48PM

**Statement 15 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
SAN DIEGO COUNCIL ON LITERACY 2515 CAMINO DEL RIO SOUTH #111 SAN DIEGO, CA 92108	NONE			\$ 20,000.
ST ANNE'S CEMETERY FUND P. O. BOX 640 DAYTON, TX 77535	NONE			2,500.
ST JAMES CATHOLIC SCHOOL 510 S CAMP STREET SEGUIN, TX 78155	NONE			20,000.
ST JOSEPH'S CATHOLIC CHURCH 108 S. WASHINGTON STREET DEVINE, TX 78016	NONE			20,000.
ST MARTIN OF TOURS CATHOLIC CHURCH 7710 EL CAJON BLVD LA MESA, CA 91941	NONE			5,000.
ST MARY'S CATHOLIC CHURCH 620 WASHBURN STREET TAYLOR, TX 76574	NONE			28,000.
ST PIUS X CATHOLIC SCHOOL 37 EAST EMERSON CHULA VISTA, CA 91911	NONE			25,000.
SAN DIEGO HALL OF CHAMPIONS 1649 EL PRADO BALBOA PARK, CA 92101	NONE			10,000.
KICK DRUGS OUT OF AMERICA 3800 N. Shepherd Street, Suite 3800 HOUSTON, TX 77018	NONE			100,000.
HERITAGE MUSEUM OF MONTGOMERY P. O. BOX 2262 CONROE, TX 77305	NONE			50,000.
BLUE VOLUNTEER FIRE DEPARTMENT 295 Chambers Dr Alvarado, TX 76009	NONE			5,000.

Client SMBF

STEPHEN &amp; MARY BIRCH FOUNDATION, INC.

22-1713022

11/12/11

03 48PM

**Statement 15 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
BURN INSTITUTE 3702 RUFFIN ROAD #101 SAN DIEGO, CA 92123	NONE			\$ 40,000.
GIFTS FOR THE UNBORN 11305 ALHAMBRA DR. AUSTIN, TX 78759	NONE			20,000.
GOOD COUNSEL INC. P. O. BOX 6068 HOBOKEN, NJ 07030	NONE			20,000.
JENNA KAY PATEK SCHOLARSHIP FUND 191 INDIAN TRAIL SEGUIN, TX 78155	NONE			5,000.
LEMON GROVE SHERIFF STATION 3240 MAIN ST. LEMON GROVE, CA 91945	NONE			15,000.
LEXINGTON VOLUNTEER FIRE DISTRICT PO Box 543 LEXINGTON, TX 78947	NONE			7,000.
LOCKS OF LOVE, INC 2925 10TH AVE. NORTH #102 LAKE WORTH, FL 33461	NONE			20,000.
MISSION OF DIVINE MERCY, INC 1346 A HUECO SPRING LOOP ROAD NEW BRAUNFELS, TX 78132	NONE			400,000.
NATIONAL BRAILLE PRESS, INC 88 ST STEPHEN STREET BOSTON, MA 02115	NONE			30,000.
RECORDING FOR THE BLIND & DYSLEXIC INC 20 ROSZEL ROAD PRINCETON, NJ 08540	NONE			25,000.
SERVANTS OF CHRIST MINISTRIES 87 A MAPLE STREET SICTUATI, MA 02066	NONE			25,000.



Client SMBF

STEPHEN &amp; MARY BIRCH FOUNDATION, INC.

22-1713022

11/12/11

03:48PM

**Statement 15 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
SOCIETY DEVOTED TO THE SACRED HEART 9814 SYLVIA AVE, NORTHRIDGE, CA 91324	NONE			\$ 100,000.
SOUTH ORANGE-MAPLEWOOD EDUCATION FDN P.O. BOX 84 MAPLEWOOD, NJ 07040	NONE			7,500.
STANFORD LAW SCHOOL STANFORD, CA 94305	NONE			10,000.
VALLEY HOSPITAL FOUNDATION 223 NO. VAN DIEN AVE RIDGEWOOD, NJ 07450	NONE			30,000.
DE PAUL UNIVERSITY 1 E. JACKSON BLVD CHICAGO, IL 60604	NONE			3,000.
FENWICK HIGH SCHOOL 505 W. WASHINGTON BLVD OAK PARK, IL 60302	NONE			3,000.
SAN DIEGO NATURAL HISTORY MUSEUM P.O. BOX 121390 SAN DIEGO, CA 92112	NONE			50,000.
SHARP HEALTH CARE FOUNDATION 8695 SPECTRUM CENTER BLVD SAN DIEGO, CA 92123	NONE			2,030,000.
USC LAW SCHOOL UNIV. OF SOUTHERN CALIFORNIA LOS ANGELES, CA 90089	NONE			6,000.
USC MEN'S TENNIS UNIV. OF SOUTHERN CALIFORNIA LOS ANGELES, CA 90089	NONE			3,000.
HEIDI RESEARCH CENTER 11549 OLD PERRIN BEITEL RD#205 SAN ANTONIO, TX 78218	NONE			26,000.

Client SMBF

STEPHEN &amp; MARY BIRCH FOUNDATION, INC.

22-1713022

11/12/11

03:48PM

**Statement 15 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
LEXINGTON POLICE DEPARTMENT LEXINGTON LEXINGTON, TX 78947	NONE			\$ 7,000.
AMERICAN MUSEUM OF NATURAL HISTORY CENTRAL PARK WEST AT 79TH ST. NEW YORK, NY 10024	NONE			5,000.
BERKELEY EAST BAY HUMANE SOCIETY 2700 9TH STREET BERKELEY, CA 94710	NONE			15,000.
BIRCH AQUARIUM AT SCRIPPS INSTITUTE 950 GILMAN DRIVE DEPT 0207 LA JOLLA, CA 92092	NONE			30,000.
BRINNEGAR CHARITABLE FOUNDATION P.O. BOX 863 LA HABRA HEIGHTS, CA 90633	NONE			10,000.
JOHN MUIR HEALTH FDN 1400 TREAT BLVD., 3RD FLOOR WALNUT CREEK, CA 94597	NONE			25,000.
LOYOLA LAW SCHOOL 919 ALBANY STREET LOS ANGELES, CA 90015	NONE			1,000.
METROPOLITAN MUSEUM OF ART 1000 5TH AVENUE NEW YORK, NY 10028	NONE			15,000.
MULTIPLE SCLEROSIS RC OF NY 521 WEST 57TH ST, 4TH FLOOR NEW YORK, NY 10019	NONE			5,000.
NEW JERSEY STATE OPERA 50 PARK PLACE, SUITE 1041 NEWARK, NJ 07102	NONE			10,000.
ST CYRIL & METHODIUS. CATHOLIC 306 S. AVE. F SHINER, TX 77984	NONE			10,000.

Client SMBF

STEPHEN &amp; MARY BIRCH FOUNDATION, INC.

22-1713022

11/12/11

03:48PM

**Statement 15 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
WEST VALLEY BOYS & GIRLS CLUB P.O. BOX 6576 WOODLAND HILLS, CA 91365	NONE			\$ 40,000.
ST MARK'S PRESCHOOL 1957 PRUNERIDGE AVE. SANTA CLARA, CA 95050	NONE			2,000.
BEYOND MISSING, INC. P.O. BOX 1185 SAUSALITO, CA 94966	NONE			10,000.
SAN SECONDO D' ASTI CATHOLIC CHURCH P.O. BOX 1056 GUASTI, CA 91743	NONE			50,000.
SEARCH DOG FOUNDATION 206 N. SIGNAL ST., SUITE R OJAI, CA 93023	NONE			30,000.
SOUTH BAY FAMILY YMCA 1201 PASEO MAGDA CHULA VISTA, CA 91910	NONE			25,000.
USC - LEVANTHAL SCHOOL OF ACCOUNTING UNIVERSITY OF SOUTHERN CALIFORNIA LOS ANGELES, CA 90089	NONE			110,000.
AGAPE THERAPEUTIC RIDING CENTER 24950 MT. PLEASANT RD CICERO, IN 46034	NONE			15,000.
NATIONAL FEDERATION FOR THE BLIND 1800 JOHNSON STREET BALTIMORE, MD 21230	NONE			30,000.
FRIENDS OF WYCKOFF PUBLIC LIBRARY INC 284 BRIARWOOD DR WYCKOFF, NJ 07481	NONE			2,500.
NATIONAL SHRINE OF THE INFANT P.O. BOX 488 PRAGUE, OK 74864	NONE			10,000.

Client SMBF

STEPHEN &amp; MARY BIRCH FOUNDATION, INC.

22-1713022

11/12/11

03 48PM

**Statement 15 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
MD ANDERSON CANCER CENTER 1515 HOLCOMBE BLVD. HOUSTON, TX 77030	NONE			\$ 50,000.
FRIENDS OF YOGI, INC. 8 QUARRY ROAD LITTLE FALLS, NJ 07424	NONE			100,000.
CDA - OUR LADY OF ANGELES #2505 P.O. BOX 1528 SEGUIN, TX 78155	NONE			30,000.
ST JAMES CATHOLIC CHURCH 510 S CAMP ST SEGUIN, TX 78155	NONE			30,000.
CHULA VISTA FIREFIGHTERS FOUNDATION 276 FOURTH AVENUE CHULA VISTA, CA 91910	NONE			20,000.
CITY OF BERKELEY ANIMAL CARE SERVICES 2013 SECOND ST BERKELEY, CA 94710	NONE			5,000.
CORPUS CHRISTI CHURCH 322 ST. JAMES DRIVE PIEDMONT, CA 94611	NONE			10,000.
COVENANT HOUSE 200 HARRISON ST OAKLAND, CA 94607	NONE			10,000.
LYRIC OPERA SAN DIEGO 2891 UNIVERSITY AVENUE, SUITE 1 SAN DIEGO, CA 92104	NONE			15,000.
MATER DEI CATHOLIC HIGH SCHOOL SCHOLARS 1613 MATER DEI DRIVE CHULA VISTA, CA 91913	NONE			20,000.
SAN DIEGO RURAL FIRE PROTECTION DISTRICT 1135 COMMUNITY BUILDING RD DULZURA, CA 91917	NONE			25,000.

Client SMBF

STEPHEN &amp; MARY BIRCH FOUNDATION, INC.

22-1713022

11/12/11

03:48PM

**Statement 15 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
SAN DIEGO YOUNG ARTISTS MUSIC ACADEMY 4125 ALPHA ST, STE B SAN DIEGO, CA 92113	NONE			\$ 2,500.
OPERATION WARM 602 CHADDS FORD DRIVE, #300 CHADDS FORD, PA 19317	NONE			20,000.
POPE JOHN PAUL II CULTURAL CENTER 3900 HAREWOOD ROAD, NE WASHINGTON, DC 20017	NONE			5,000.
HAPPY HOLLOW CHILDREN'S CAMP INC. 615 N. Alabama Street, Suite 228 Indianapolis, IN 46204	NONE			25,000.
XAVERIAN MISSIONARIES 101 SUMMER ST HOLLISTON, MA 01746	NONE			75,000.
OUR LADY OF FATIMA SHRINE 101 SUMMER STREET HOLLISTON, MA 01746	NONE			15,000.
ST JOHN VIANNEY PARISH 10497 COLIMA RD RANKICH CORVIA, CA 95670	NONE			2,000.
EDGEWOOD CHILDREN'S CENTER 330 NORTH GORE AVENUE WEBSTER GROVES, MO 63119	NONE			20,000.
THE SEEING EYE 10 WASHINGTON VALLEY RD MORRISTOWN, NJ 07963	NONE			25,000.
GUIDING EYES FOR THE BLIND 611 GRANITE SPRINGS RD YORKTOWN HEIGHTS, NY 10598	NONE			10,000.
MEMORIAL SLOAN KETTERING CANCER CENTER 1275 YORK AVENUE NEW YORK, NY 10065	NONE			17,500.

Client SMBF

STEPHEN &amp; MARY BIRCH FOUNDATION, INC.

22-1713022

11/12/11

03:48PM

**Statement 15 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
TEXAS ADAPTIVE AQUATICS ASSN PO BOX 41301 HOUSTON, TX 77241	NONE			\$ 15,000.
MID-TEXAS SYMPHONY P.O. BOX 3216 TLU SEGUIN, TX 78155	NONE			25,000.
BROOKSIDE HILLSIDE MUSIC & ARTS ASSOC 100 BROOKSIDE AVE % BHMAA ALLENDALE, NJ 07401	NONE			10,000.
NOCONA RURAL VOLUNTEER FIRE DEPARTMENT PO BOX 55 NOCONA, TX 76255	NONE			7,000.
LEXINGTON EMS 729 AVENUE A UNIT 3 LEXINGTON, TX 78947	NONE			7,000.
MARION BAND BOOSTER CLUB MARION HIGH SCHOOL, 1 MARION WAY MARION, TX 78124	NONE			2,000.
RAWHIDE, INC. E7475 RAWHIDE RD NEW LONDON, WI 54961	NONE			40,000.
ST JOHN LUTH DAY CARE 606 South Center Street Marion, TX 78124	NONE			7,000.
MONTAGUE VOLUNTEER FIRE DEPARTMENT 1000 GRAND STREET MONTAGUE, TX 76251	NONE			7,000.
DARE-SEGUIN POLICE DEPT. 350 N. GUADALUPE ST. SEGUIN, TX 78155	NONE			10,000.
FOCUS WORLDWIDE NETWORK 229 N. VERMONT ST. COVINGTON, LA 70433	NONE			100,000.

Client SMBF

STEPHEN &amp; MARY BIRCH FOUNDATION, INC.

22-1713022

11/12/11

03.48PM

**Statement 15 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
DIOCESE OF MANDEVILLE JAMAICA 66 CALEDONIA ROAD DIX HILLS, NY 11746	NONE			\$ 15,000.
Parlance Chamber Concerts, Inc. 138 Phelps Rd. Ridgewood, NJ 07450	NONE			10,000.
FIRST RESORT 1933 DAVIS ST. SUITE 200-B SAN LEANDRO, CA 94577	NONE			10,000.
FREINDS OF CHULA VISTA NATURE CTR 1000 Gunpowder Point Drive Chula Vista, CA 91910	NONE			25,000.
PASADENA DANCETHEATRE 1985 Locust Street Pasadena, CA 91107	NONE			1,000.
SAN MARINO COMMUNITY ATHLETIC FDN 1613 Chelsea Road #856 San Marino, CA 91108	NONE			3,000.
SVDP MGMT INC FR JOES VILLAGE 3350 E Street San Diego, CA 92102	NONE			500,000.
THE CHILDRENS TUMOR FOUNDATION 11601 Wilshire Blvd., Suite 500 Los Angeles, CA 90025	NONE			10,000.
UNITED CATHOLIC MUSIC & VIDEO ASSN P.O. Box 230 Donnellson, IA 52625	NONE			45,000.
THE KIMBERLY JO PATEK FDN 5408 N.E. Wedgewood Lane Lee's Summit, MO 64064	NONE			25,000.
MARY MOTHER RECONCILER FOUNDATION 52 Berlin Rd Ste 3000 Cherry Hill, NJ 08034	NONE			250,000.

Client SMBF

STEPHEN &amp; MARY BIRCH FOUNDATION, INC.

22-1713022

11/12/11

03 48PM

**Statement 15 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
THE COLLEGIUM CTR FOR FAITH 2901 Good Intent Rd Deptford, NJ 08096	NONE			\$ 150,000.
BROWN COUNTY SHERIFF'S OFFICE 1050 WEST COMMERCE BROWNWOOD, TX 76801	NONE			15,000.
GUADALUPE RADIO NETWORK P.O. Box 10571 MIDLAND, TX 79702	NONE			10,000.
SEGUIN BLUE SANTA PROJECT 205 N. River St Seguin, TX 78155	NONE			10,000.
FAITH & FAMILY FOUNDATION 15164 Berlin Turnpike Purcellville, VA	NONE		UNUSUAL GRANT TO ACQUIRE PROPERTY FOR HANDICAPPED AND SPECIAL NEEDS CHILDREN	3,100,000.
MUSK OX DEV CAP 12850 East Archie Road Palmer, AK 99645	NONE			2,000.
HOPE SPRINGS EQUESTRIAN THERAP PO Box 156 Chester Sprgs, PA 19425	NONE			5,000.
DISABLED AMER VET AUX INC 3756 Stirrup Dr Kingman, AZ 86409	NONE			1,000.
CDA - TEXAS STATE COURT 1801 BILLY CASPER EL PASO, TX 79936	NONE			20,000.
KICKSTART 2435 POLK ST, SUITE 20 SAN FRANCISCO, CA 94109	NONE			100,000.
ANSONIA MUSIC OUTREACH ORGANIZATION 330 Wadsworth Avenue, 2G New York, NY 10040	NONE			20,000.
BATTERED WOMEN'S FOUNDATION PO Box 54888 Hurst, TX 76054	NONE			10,000.



Client SMBF

STEPHEN &amp; MARY BIRCH FOUNDATION, INC.

22-1713022

11/12/11

03 48PM

**Statement 15 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
CHILDRENS PRISONS ARTS PROJECT 605 1/2 W Bell St Houston, TX 77019	NONE			\$ 3,000.
COMMUNITY OUTREACH INC 865 NW REIMAN AVENUE CORVALLIS, OR 97330	NONE			5,000.
FAMILY AIDS CATHOLIC EDUCATION 3014 Lakeshore Avenue Oakland, CA 94610	NONE			10,000.
JAM MINISTRIES 3336 Wrightsboro Road Bldg 500 Augusta, GA 30909	NONE			2,500.
PEMBINA AMBULANCE SERVICE INC PO Box 131 Pembina, ND 58271	NONE			10,000.
PROGRAMS FOR PARENTS INC 33 Washington St Ste 601 Newark, NJ 07102	NONE			2,500.
RESCUE MISSION ALLIANCE 315 N A St Oxnard, CA 93030	NONE			10,000.
SPIRIT HORSE THERAPEUTIC RIDING 1960 POST OAK DR CORINTH, TX 76210	NONE			10,500.
VISTA CARE HOSPICE FDN-RETURN OF CONT 1911 COOPERATE DRIVE SAN MARCOS, TX 78666	NONE			-100,666.
TALES 'N' TRAILS MUSEUM 1522 E. US HIGHWAY 82 NOCONA, TX 76255	NONE			10,400.

Total \$ 10,477,734.

**Application for Extension of Time To File an  
Exempt Organization Return**

OMB No 1545-1709

► **File a separate application for each return.**

- 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](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*

**Part I 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*

<b>Type or print</b>  File by the due date for filing your return. See instructions	Name of exempt organization	Employer identification number
	STEPHEN & MARY BIRCH FOUNDATION, INC.	22-1713022
	Number, street, and room or suite number. If a P.O. box, see instructions	
	103 FOULK ROAD, #200	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	WILMINGTON, DE 19803	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (section 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ► ROSE PATEK

Telephone No ► 888-372-6303 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 ☐ and attach a list with the names and EINs of all members the extension is for

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 8/15, 20 11, to file the exempt organization return for the organization named above. The extension is for the organization's return for
- ☒ calendar year 20 10 or
  - ☐ tax year beginning \_\_\_\_\_, 20 \_\_\_\_\_, and ending \_\_\_\_\_, 20 \_\_\_\_\_

- 2 If the tax year entered in line 1 is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period

<b>3a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$	0.
<b>b</b> If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$	60,148.
<b>c Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$	0.

**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.**BAA For Paperwork Reduction Act Notice, see Instructions.**Form **8868** (Rev. 1-2011)

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Type or print	Name of exempt organization	Employer identification number
	STEPHEN & MARY BIRCH FOUNDATION, INC.	22-1713022
	Number, street, and room or suite number. If a P.O. box, see instructions.	
	Winnie K. Huang Accountancy Corporation 175 South Lake Avenue, Suite 307	
File by the extended due date for filing the return. See instructions.	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	Pasadena, CA 91101	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990	01		
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (section 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

- The books are in care of ☒ ROSE PATEK  
Telephone No ☒ 888-372-6303 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 ☐ and attach a list with the names and EINs of all members the extension is for

4 I request an additional 3-month extension of time until 11/15, 20 11

5 For calendar year 2010, or other tax year beginning \_\_\_\_\_, 20\_\_\_\_, and ending \_\_\_\_\_, 20\_\_\_\_

6 If the tax year entered in line 5 is for less than 12 months, check reason ☐ Initial return ☐ Final return

☐ Change in accounting period

7 State in detail why you need the extension ADDITIONAL TIME IS NEEDED TO COMPILE DATA NECESSARY TO FILE A COMPLETE AND ACCURATE TAX RETURNS.

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	0.
8b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	60,148.
8c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

**Signature and Verification**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature ☒ E-file Title \_\_\_\_\_ Date \_\_\_\_\_

BAA

FIFZ0502L 11/15/10

Form 8868 (Rev 1-2011)