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Form **990-PF**

# 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 , and ending

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

Name of foundation

THE ROCCO AND NANCY ORTENZIO  
FOUNDATION

A Employer identification number

23-6805409

Number and street (or P O box number if mail is not delivered to street address)

4718 GETTYSBURG ROAD - SUITE

Room/suite

405

B Telephone number (see page 10 of the instructions)

717-972-1305

City or town, state, and ZIP code

MECHANICSBURG PA 17055

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, col (c),

line 16) \$ 13,145,336 (Part I, column (d) must be on cash basis )

J Accounting method ☒ Cash ☐ Accrual☐ Other (specify)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 ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions) )		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	495,638	492,535		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	26,600			
	b Gross sales price for all assets on line 6a 6,827,113				
	7 Capital gain net income (from Part IV, line 2)		26,600		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns & allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule) STMT 1	15,531				
12 Total. Add lines 1 through 11	537,769	519,135	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) STMT 2	5,040	1,680		3,360
	c Other professional fees (attach schedule)				
	17 Interest	36			
	18 Taxes (attach schedule) (see page 14 of the instructions) STMT 3	4,854	464		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (att sch) STMT 4	34,316	34,274		15
	24 Total operating and administrative expenses. Add lines 13 through 23	44,246	36,418	0	3,375
	25 Contributions, gifts, grants paid	911,651			911,651
26 Total expenses and disbursements. Add lines 24 and 25	955,897	36,418	0	915,026	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-418,128				
b Net investment income (if negative, enter -0-)		482,717			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see page 30 of the instructions.

Form 990-PF (2010)

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	24,926	3,794	3,794
	2	Savings and temporary cash investments	387,372	271,399	271,399
	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 page 15 of the instructions)			
	7	Other notes and loans receivable (att. schedule) ▶ Less allowance for doubtful accounts ▶	0		
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U.S. and state government obligations (attach schedule) STMT 5	2,598,042	1,042,091	1,076,333
	b	Investments—corporate stock (attach schedule) SEE STMT 6	1,082,231	2,136,874	5,611,116
	c	Investments—corporate bonds (attach schedule) SEE STMT 7	4,697,111	5,791,684	6,044,599
	11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch.) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule) SEE STATEMENT 8	1,005,244	130,956	138,095
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch.) ▶			
	15	Other assets (describe ▶)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	9,794,926	9,376,798	13,145,336
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and 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	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	9,794,926	9,376,798	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	9,794,926	9,376,798	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	9,794,926	9,376,798	

## 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	9,794,926
2	Enter amount from Part I, line 27a	2	-418,128
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	9,376,798
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	9,376,798

**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 shs MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a</b>	MARKETABLE SECURITIES	P	VARIOUS	VARIOUS
<b>b</b>	MARKETABLE SECURITIES	P	VARIOUS	VARIOUS
<b>c</b>	6420.91 SHS SELECT STRATEGY PARTNERS	P	10/01/02	12/31/10
<b>d</b>	NET LOSS FROM PASS-THRU ENTITY	P	VARIOUS	VARIOUS
<b>e</b>	CAPITAL GAIN DISTRIBUTIONS	P	VARIOUS	VARIOUS

  

(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)
<b>a</b> 3,297,559		3,285,393	12,166
<b>b</b> 2,654,970		2,625,307	29,663
<b>c</b> 862,262		885,372	-23,110
<b>d</b>		4,441	-4,441
<b>e</b> 12,322			12,322

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
<b>a</b>			12,166
<b>b</b>			29,663
<b>c</b>			-23,110
<b>d</b>			-4,441
<b>e</b>			12,322

  

<b>2</b> 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>	<b>2</b>	26,600
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		<b>3</b>	12,166

**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 page 18 of 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 (col. (b) divided by col. (c))
2009	880,173	12,330,302	0.071383
2008	536,237	12,946,963	0.041418
2007	483,612	13,620,804	0.035505
2006	257,660	12,911,029	0.019957
2005	523,813	9,928,167	0.052760

  

<b>2</b> Total of line 1, column (d)	<b>2</b>	0.221023
<b>3</b> 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	<b>3</b>	0.044205
<b>4</b> Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	<b>4</b>	13,673,695
<b>5</b> Multiply line 4 by line 3	<b>5</b>	604,446
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	4,827
<b>7</b> Add lines 5 and 6	<b>7</b>	609,273
<b>8</b> Enter qualifying distributions from Part XII, line 4 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 on page 18.	<b>8</b>	915,026

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)**

<b>1a</b>	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 instructions)		
<b>b</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	<b>1</b>	4,827
<b>c</b>	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>	0
<b>3</b>	Add lines 1 and 2	<b>3</b>	4,827
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>	0
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	<b>5</b>	4,827
<b>6</b>	Credits/Payments:		
<b>a</b>	2010 estimated tax payments and 2009 overpayment credited to 2010	<b>6a</b>	4,365
<b>b</b>	Exempt foreign organizations—tax withheld at source	<b>6b</b>	
<b>c</b>	Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>	3,500
<b>d</b>	Backup withholding erroneously withheld	<b>6d</b>	
<b>7</b>	Total credits and payments. Add lines 6a through 6d	<b>7</b>	7,865
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	<b>8</b>	
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	<b>9</b>	
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	<b>10</b>	3,038
<b>11</b>	Enter the amount of line 10 to be <b>Credited to 2011 estimated tax</b> <b>3,038</b> <b>Refunded</b>	<b>11</b>	

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> 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>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? If the answer is "Yes" to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?		X
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <b>\$</b> _____ (2) On foundation managers <b>\$</b> _____		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <b>\$</b> _____		
<b>2</b> 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
<b>3</b> 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
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?		
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
<b>6</b> 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	
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) <b>PA</b>		
<b>b</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	
<b>9</b> 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 on page 27)? If "Yes," complete Part XIV		X
<b>10</b> Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

**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 page 20 of the 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 ► N/A	13	X	
14	The books are in care of ► ROBERT L. NAUSE 4718 GETTYSBURG ROAD SUITE 405 Located at ► MECHANICSBURG PA ZIP+4 ► 17055	Telephone no ► 717-972-1305		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the year	15	► <input type="checkbox"/>	
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 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 ►	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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" 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 page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/> ► <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? N/A	1c	
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 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 ► 20 , 20 , 20 , 20		
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 page 22 of the instructions ) N/A	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20 , 20 , 20 , 20		
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 ) N/A	3b	
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

**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 page 22 of the 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 page 22 of the instructions)? ☐ N/A **5b**

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? ☐ Yes ☒ No **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? ☐ Yes ☒ No **7b** N/A

**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 page 22 of the 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
ROCCO A. ORTENZIO 7 WESTWIND DR. LEMOYNE PA 17043	TRUSTEE 5.00	0	0	0
JOHN M. ORTENZIO 510 ORCHARD DR. LEMOYNE PA 17043	TRUSTEE 5.00	0	0	0
ROBERT A. ORTENZIO 1716 OLMSTEAD WAY E. CAMP HILL PA 17011	TRUSTEE 5.00	0	0	0
MARTIN J. ORTENZIO 12314 CLEGHORN RD. COCKEYSVILLE MD 21030	TRUSTEE 5.00	0	0	0

**2 Compensation of five highest-paid employees (other than those included on line 1 — see page 23 of the 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

**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 page 23 of the instructions). If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services ▶**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 page 24 of the 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 page 24 of the instructions	
3	
Total. Add lines 1 through 3 <span style="float: right;">▶</span>	



**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	13,540,391
<b>b</b>	Average of monthly cash balances	<b>1b</b>	341,533
<b>c</b>	Fair market value of all other assets (see page 25 of the instructions)	<b>1c</b>	0
<b>d</b>	Total (add lines 1a, b, and c)	<b>1d</b>	13,881,924
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	13,881,924
<b>4</b>	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	<b>4</b>	208,229
<b>5</b>	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	13,673,695
<b>6</b>	Minimum investment return. Enter 5% of line 5	<b>6</b>	683,685

**Part XI Distributable Amount** (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	683,685
<b>2a</b>	Tax on investment income for 2010 from Part VI, line 5	<b>2a</b>	4,827
<b>b</b>	Income tax for 2010 (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	4,827
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	678,858
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b>	Add lines 3 and 4	<b>5</b>	678,858
<b>6</b>	Deduction from distributable amount (see page 25 of the instructions)	<b>6</b>	
<b>7</b>	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	678,858

**Part XII Qualifying Distributions** (see page 25 of the instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	<b>1a</b>	915,026
<b>b</b>	Program-related investments—total from Part IX-B	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	915,026
<b>5</b>	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)	<b>5</b>	4,827
<b>6</b>	Adjusted qualifying distributions. Subtract line 5 from line 4	<b>6</b>	910,199

**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.

**Part XIII Undistributed Income** (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				678,858
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			225,877	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2010				
a From 2005				
b From 2006				
c From 2007				
d From 2008				
e From 2009				
f Total of lines 3a through e				
4 Qualifying distributions for 2010 from Part XII, line 4 ▶ \$ 915,026				
a Applied to 2009, but not more than line 2a			225,877	
b 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				678,858
e Remaining amount distributed out of corpus	10,291			
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	10,291			
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				
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions				
e Undistributed income for 2009 Subtract line 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 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 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. Subtract lines 7 and 8 from line 6a	10,291			
10 Analysis of line 9				
a Excess from 2006				
b Excess from 2007				
c Excess from 2008				
d Excess from 2009				
e Excess from 2010	10,291			

**Part XIV Private Operating Foundations** (see page 27 of the instructions and Part VII-A, question 9)

**1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2010, enter the date of the ruling

**b** Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2010	(b) 2009	(c) 2008	(d) 2007	
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
<b>b</b> 85% of line 2a					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon					
<b>a</b> "Assets" alternative test—enter					
<b>(1)</b> Value of all assets					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
<b>c</b> "Support" alternative test—enter					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> Gross investment income					

**Part XV Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see page 28 of the instructions.)**1 Information Regarding Foundation Managers:**

**a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2) )

SEE STATEMENT 9

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

N/A

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

**a** The name, address, and telephone number of the person to whom applications should be addressed

ROBERT A. ORTENZIO 717-972-1305

4718 GETTYSBURG RD - SUITE 405, MECHANICSBURG PA 17055

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

A LETTER STATING REQUEST FOR FUNDS AND EXPLANATION OF NEED

**c** Any submission deadlines

APPLICATIONS ARE ACCEPTED AT ANY TIME

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

SEE STATEMENT 10

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> Paid during the year SEE SCHEDULE	N/A	PUBLIC ORGANIZATIONS' EXEMPT	PURPOSES	911,651
<b>Total</b>			▶ <b>3a</b>	911,651
<b>b</b> Approved for future payment SEE STATEMENT 11				11,063,693
<b>Total</b>			▶ <b>3b</b>	11,063,693





**Federal Statements**

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

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
INCOME FROM PASS THRU			
UBTI FROM PASS THRU ENTITY	\$ 15,819	\$	\$
	-288		
TOTAL	\$ 15,531	\$ 0	\$ 0

**Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
MARTIN M. SACKS & ASSOCIATES, CP				
\$	\$	\$	\$	
PREPARATION OF FORM 990-PF	5,040	1,680		3,360
TOTAL	\$ 5,040	\$ 1,680	\$ 0	\$ 3,360

**Statement 3 - Form 990-PF, Part I, Line 18 - Taxes**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXCISE TAX ON NET INVESTMENT INC				
\$ 4,390	\$	\$	\$	
FOREIGN TAX WITHHELD ON DIVIDEND	464	464		
TOTAL	\$ 4,854	\$ 464	\$ 0	\$ 0

**Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES	\$	\$	\$	\$
ASSET MGMT AND CUSTODY FEES	30,723	30,723		
MISCELLANEOUS	29			15
NON-DEDUCTIBLE EXPENSE	13			
DEDUCTIONS FROM INVESTMENT				

**Federal Statements**

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**Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses (continued)**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
PASS-THRU ENTITIES	\$ 3,551	\$ 3,551	\$	\$
TOTAL	\$ 34,316	\$ 34,274	\$ 0	\$ 15

**Statement 5 - Form 990-PF, Part II, Line 10a - US and State Government Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
LANSDALE PA PKG	\$ 29,100	\$	MARKET	\$
WEST SHORE PA	29,295		MARKET	
VANGUARD MUNI	304,253		MARKET	
FEDERAL HOME LOAN	201,380		MARKET	
DODGE & COX INC	156,092		MARKET	
PIMCO LOW DURATION	301,258		MARKET	
PIMCO SHORT TERM	211,034	160,665	MARKET	168,398
PIMCO TOTAL RETURN	546,671	200,353	MARKET	202,306
PIMCO UNCONSTRAINED	200,000	185,759	MARKET	196,187
VANGUARD SHORT TERM	307,428		MARKET	
VANGUARD TOTAL BOND	311,531		MARKET	
DOUBLELINE TOTAL		290,906	MARKET	299,643
METROPOLITAN WEST		204,408	MARKET	209,799
TOTAL	\$ 2,598,042	\$ 1,042,091		\$ 1,076,333

**Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
S&P 500 SPIDERS	\$ 2,946	\$ 1,903	MARKET	\$ 2,389
THORNBURG INVEST	156,429	168,798	MARKET	206,640



## Federal Statements

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**Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments (continued)**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
VANGUARD BALANCED	\$ 151,157	\$ 154,916	MARKET	\$ 170,210
VANGUARD GROWTH	960		MARKET	
VANGUARD LARGE	976		MARKET	
VANGUARD WELLESLEY	126,506	131,708	MARKET	141,617
S&P 400 MID-CAP	1,913	1,871	MARKET	2,635
POWERSHARES LIST	999		MARKET	
SELECT MEDICAL CORP	528,591	528,591	MARKET	3,890,031
DODGE & COX INTERNATIONAL	101,375	102,957	MARKET	115,746
MSCI EAFE INDEX	1,987		MARKET	
VANGUARD EUROPE	1,157		MARKET	
VANGUARD PACIFIC	969		MARKET	
ISHARES MSCI EMERGING	2,296		MARKET	
STREETTRACKS GOLD	3,970	4,357	MARKET	5,965
DOW DIAMONDS		1,028	MARKET	1,156
HUSSMAN STRATEGIC		100,216	MARKET	96,157
PIMCO ALL ASSET		100,000	MARKET	102,786
PIMCO GLOBAL		88,629	MARKET	86,545
T ROWE PRICE		148,135	MARKET	162,329
SHORT S&P 500		983	MARKET	833
VANGUARD DIVIDEND		1,868	MARKET	2,105
FPA CRESCENT FUND		141,000	MARKET	145,063
GREENSPRING FUND		148,211	MARKET	151,926
IVA WORLDWIDE		128,928	MARKET	139,854
VANGUARD SMALL CAP		978	MARKET	1,162
WELLS FARGO ADVANTAGE		80,000	MARKET	83,212
FIRST EAGLE GLOBAL		100,000	MARKET	100,695

**Federal Statements**

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**Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments (continued)**

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Basis of Valuation</u>	<u>Fair Market Value</u>
ISHARES MSCI EMERGING	\$	\$ 781	MARKET	\$ 953
VANGUARD REIT		1,016	MARKET	1,107
TOTAL	\$ 1,082,231	\$ 2,136,874		\$ 5,611,116

**Statement 7 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments**

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Basis of Valuation</u>	<u>Fair Market Value</u>
AMCORE BANK CD	\$ 50,000	\$	MARKET	\$
BRANCH BANKING	100,000	100,000	MARKET	100,770
DRAKE BANK CD	100,000		MARKET	
HUNTINGTON NATIONAL	100,000		MARKET	
MERCANTILE BANK	50,000		MARKET	
PARAGON NATIONAL	50,000		MARKET	
SECURITY EXCHANGE	100,000		MARKET	
SUNTRUST BANK CD	100,000	98,575	MARKET	101,623
AUSTRALIAN GOVERNMENT	69,734		MARKET	
PHILLIP MORRIS CO	77,625		MARKET	
AMERICAN ELECTRIC	75,905		MARKET	
AMERICAN EXPRESS	97,825	97,825	MARKET	109,717
BERKSHIRE HATHAWAY	55,250	55,250	MARKET	57,664
CVS CORP BOND	48,592		MARKET	
COMCAST HOLDING	59,652	149,009	MARKET	149,030
BANK OF AMERICA	105,935	105,935	MARKET	105,596
DUSQUESNE LIGHT	83,015	83,015	MARKET	80,810
GENERAL ELECTRIC	76,667		MARKET	
GENERAL ELECTRIC	73,097		MARKET	

## Federal Statements

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**Statement 7 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments (continued)**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
GENERAL ELECTRIC	\$ 99,750	\$ 99,750	MARKET	\$ 109,143
GENERAL ELECTRIC	94,286	94,286	MARKET	97,814
GOLDMAN SACHS	106,748		MARKET	
GOLDMAN SACHS	74,063	74,063	MARKET	76,814
JP MORGAN CHASE	55,090		MARKET	
BANK OF AMERICA	109,787	109,787	MARKET	109,041
BANK OF AMERICA	157,139	157,139	MARKET	162,728
MORGAN STANLEY	130,105	130,105	MARKET	128,867
MORGAN STANLEY	48,312		MARKET	
PNC CONVERTIBLE	93,875	93,875	MARKET	101,792
PPL ELECTRIC UTILITIES	78,450	78,450	MARKET	79,306
AT&T COMMUNICATION	102,950		MARKET	
US ONCOLOGY	154,250	154,250	MARKET	161,717
UNITED HEALTH GR	48,375		MARKET	
UNITED HEALTH GR	75,225		MARKET	
WELLS FARGO	39,600		MARKET	
SELECT MEDICAL HOLDINGS	905,536	916,867	MARKET	1,000,000
JP MORGAN STRATEGY	201,474	311,660	MARKET	317,423
PIMCO HIGH YIELD	235,853	257,071	MARKET	303,289
VANGUARD SHORT TERM	412,946	427,835	MARKET	462,697
INTER AMERICAN		46,061	MARKET	49,934
AIG		74,344	MARKET	75,321
CITIGROUP INC		76,575	MARKET	82,325
COVENTRY HEALTH		82,491	MARKET	85,267
FORD MOTOR CREDIT		48,625	MARKET	50,788
FORD MOTOR CREDIT		100,250	MARKET	102,012

**Federal Statements**

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**Statement 7 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments (continued)**

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Basis of Valuation</u>	<u>Fair Market Value</u>
FORD MOTOR CREDIT	\$	\$ 51,650	MARKET	\$ 54,723
GMAC		51,052	MARKET	52,762
GMAC LLC		76,969	MARKET	78,469
HCA INC		102,625	MARKET	104,158
HEALTHSOUTH CORP		81,656	MARKET	82,577
LENNAR CORP		102,650	MARKET	103,131
FIDELITY FLOATING		321,784	MARKET	321,999
BARCLAYS CAPITAL		1,197	MARKET	1,231
OPPENHEIMER SR		318,744	MARKET	324,089
OSTERWEIS STRATEGIC		305,637	MARKET	301,042
PUTNAM DIVERSIFIED		354,627	MARKET	358,930
TOTAL	\$ <u>4,697,111</u>	\$ <u>5,791,684</u>		\$ <u>6,044,599</u>

**Statement 8 - Form 990-PF, Part II, Line 13 - Other Investments**

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Basis of Valuation</u>	<u>Fair Market Value</u>
LIMITED PARTNERSHIP INTERESTS IN	\$	\$		\$
INVESTMENT PARTNERSHIPS:				
SELECT STRATEGY PARTNERS, L.P.	1,005,244	130,956	MARKET	138,095
TOTAL	\$ <u>1,005,244</u>	\$ <u>130,956</u>		\$ <u>138,095</u>

**Federal Statements**

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**Statement 9 - Form 990-PF, Part XV, Line 1a - Managers Who Contributed Over 2% or \$5,000**

<u>Name of Manager</u>	<u>Amount</u>
ROCCO A. ORTENZIO	\$
JOHN M. ORTENZIO	
ROBERT A. ORTENZIO	
MARTIN J. ORTENZIO	
TOTAL	\$ <u>0</u>

**Statement 10 - Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations**Description

GRANTS ARE PRIMARILY RESTRICTED TO ROMAN CATHOLIC EDUCATIONAL INSTITUTIONS, TO PROVIDE SCHOLARSHIPS OR OTHER ASSISTANCE TO QUALIFIED STUDENTS WITH FINANCIAL NEED, WITH FIRST PREFERENCE BEING GIVEN TO STUDENTS WHO ARE MEMBERS OF ST. ANN'S ROMAN CATHOLIC CHURCH, STEELTON, PENNSYLVANIA.

## Federal Statements

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**Statement 11 - Form 990-PF, Part XV, Line 3b - Grants and Contributions Approved for  
Future Pmt**

Name	Address	Address	
Relationship	Status	Purpose	Amount
HARRISBURG UNIVERSITY OF	304 MARKET ST.	HARRISBURG PA 17101	
N/A	PUBLIC	CONSTRUCT EDUCATIONAL FACILITY	567,860
THE PENNSYLVANIA ST. UNIV	ONE OLD MAIN	UNIVERSITY PARK PA 16802	
N/A	PUBLIC	CONSTRUCT BUILDING	133,333
UNIVERSITY OF NOTRE DAME	405 MAIN BUILDING	NOTRE DAME IN 46556	
N/A	PUBLIC	CONSTRUCT EDUCATIONAL FACILITY	675,000
SUSQUEHANNA UNIVERSITY	514 UNIVERSITY AVENUE	SELINSGROVE PA 17870	
N/A	PUBLIC	EDUCATIONAL ENDOWMENT FUND	2,600,000
HOLY SPIRIT HOSPITAL	503 N. 21ST STREET	CAMP HILL PA 17011	
N/A	PUBLIC	SUPPORT HEART CENTER	87,500
THE PENNSYLVANIA ST UNIV	ONE OLD MAIN	UNIVERSITY PARK PA 16802	
N/A	PUBLIC	CONSTRUCT BUILDING	3,000,000
BISHOP MCDEVITT HS	2200 MARKET ST.	HARRISBURG PA 17103	
N/A	PUBLIC	CONSTRUCT EDUCATIONAL FACILITY	4,000,000
TOTAL			<u>11,063,693</u>

**The Rocco and Nancy Ortezio Family Foundation**  
List of 2010 Donations

Date	Name & Address	Amount
1/7/2010	Diocese of Harrisburg - The Catholic Witness 4800 Union Deposit Road Harrisburg, PA 17111 (717) 657-4804 Tel (717) 652-7547 Fax	\$ 3,000 00
6/24/2010	University of Notre Dame 400 Main Building Notre Dame, IN 46556 (574) 631-9969 Tel (574) 631-8085 Fax	\$ 15,000 00
8/18/2010	Big Dave Memorial Scholarship Fund 133 Yellow Breeches Drive Camp Hill, PA 17011	\$ 1,000 00
9/14/2010	Catholic Charities - Christopher Columbus 1492 Society c/o 1104 Fernwood Avenue, Suite 204 Camp Hill, PA 17011	\$ 500 00
9/21/2010	South Hanover Knights Youth Football Association PO Box 608 Hummelstown, PA 17036 (717) 903-7639 Tel	\$ 1,200 00
11/23/2010	Basilica of the Assumption Historic Trust, Inc 409 Cathedral St Baltimore, MD 21201 (410) 727-3565 Tel (410) 539-0407 Fax	\$ 50,000 00
11/23/2010	Harrisburg University of Science and Technology 304 Market Street Harrisburg, PA 17101 (717) 901-5100 Tel (717) 901-5150 Fax	\$ 189,285 00
11/23/2010	Pennsylvania State University - Hershey Children's Hospital One Old Main University Park, PA 16802 (877) 888-5646 Tel	\$ 66,666 00
11/23/2010	Holy Spirit Hospital of the Sisters of Christian Charity 503 North 21 <sup>st</sup> Street Camp Hill, PA 17011 (717) 763-2100	\$ 87,500 00
11/23/2010	University of Notre Dame 405 Main Building Notre Dame, Indiana 46556 (574) 631-9969 Tel (574) 631-8085 Fax	\$ 200,000 00
11/23/2010	Susquehanna University 514 University Avenue Selinsgrove, PA 17870 (800) 353-7970 Tel (570) 372-2710 Fax	\$ 200,000 00

**The Rocco and Nancy Ortenzio Family Foundation**  
List of 2010 Donations

11/23/2010	Bishop McDevitt High School 2200 Market Street Harrisburg, PA 17103 (717) 236-7973 Tel (717) 234-1270 Fax	\$ 25,000 00
11/23/2010	United Way of the Capital Region - Bishop McDevitt High School 2235 Millennium Way Enola, PA 17025 (717) 732-0700 Tel (717) 732-5100 Fax	\$ 10,000 00
11/23/2010	The Cathedral Parish of Saint Patrick 212 State Street Harrisburg, PA 17101 (717) 232-2169	\$ 10,000 00
11/23/2010	The Cathedral Consolidated School 212 State Street Harrisburg, PA 17101 (717) 232-2169	\$ 10,000 00
11/23/2010	CURE International 701 Bosler Avenue Lemoyne, PA 17043 (717) 730-6706 Tel (717) 730-6747 Fax	\$ 5,000 00
11/23/2010	Trinity High School 3601 Simpson Ferry Road Camp Hill, PA 17011 (717) 761-2228 Tel (717) 761-7309 Fax	\$ 5,000 00
11/23/2010	Nativity School of Harrisburg 2135 N 6th Street - 2nd floor PO Box 5500 Harrisburg, PA 17110 (717) 236-5602 Tel (717) 236-8604 Fax	\$ 2,500 00
11/23/2010	University of Pennsylvania - Grapplers Club Fund 3451 Walnut Street 433 Franklin Building Philadelphia, PA 19104 (215) 898-2672 Tel	\$ 10,000 00
11/23/2010	Pennsylvania State University One Old Main University Park, PA 16802 (877) 888-5646 Tel	\$ 10,000 00
11/23/2010	The Partnership for Inner-City Education 1011 First Avenue, 18th floor New York, NY 10022 (646) 794-3338 Tel (646) 688-2956 Fax	\$ 10,000 00
<b>Total 2010 Charitable Contributions:</b>		<hr/> \$ 911,651 00



Form  
(Rev. January 2011)**8868**Department of the Treasury  
Internal Revenue Service**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>	Name of exempt organization <b>THE ROCCO AND NANCY ORTENZIO FAMILY FOUNDATION</b>	Employer identification number <b>23-6805409</b>
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P O box, see instructions <b>4718 GETTYSBURG ROAD - SUITE 405</b>	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions <b>MECHANICSBURG PA 17055</b>	

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 (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

**ROBERT L. NAUSE**  
**4718 GETTYSBURG ROAD SUITE 405**

- The books are in the care of ► **MECHANICSBURG**  
Telephone No ► **717-972-1305**

FAX No ►

PA 17055

- 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 **08/15/11**, to file the exempt organization return for the organization named above. The extension is for the organization's return for

► ☒ calendar year **2010** or  
► ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

- 2 If this 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>	\$	<b>4,865</b>
<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>	\$	<b>1,365</b>
<b>c</b> Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	<b>3c</b>	\$	<b>3,500</b>

**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.

For Paperwork Reduction Act Notice, see Instructions.  
DAA

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 File by the extended due date for filing your return See instructions	Name of exempt organization <b>THE ROCCO AND NANCY ORTENZIO FAMILY FOUNDATION</b>	Employer identification number <b>23-6805409</b>
	Number, street, and room or suite no. If a P O box, see instructions <b>4718 GETTYSBURG ROAD - SUITE 405</b>	
	City, town or post office, state, and ZIP code For a foreign address, see instructions <b>MECHANICSBURG PA 17055</b>	

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 (sec. 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.**

ROBERT L. NAUSE

4718 GETTYSBURG ROAD SUITE 405

- The books are in the care of **MECHANICSBURG**

PA 17055

Telephone No **717-972-1305**

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 **11/15/11**

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

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 REQUESTED TO GATHER INFORMATION TO PREPARE A COMPLETE AND ACCURATE RETURN.**

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
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 and any amount paid previously with Form 8868	8b	\$	4,865
c 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

Title **TRUSTEE**

Date **08/10/11**

Form **8868** (Rev. 1-2011)