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

2010Department 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 LAMPL FAMILY FOUNDATION		A Employer identification number 34-1499838
Number and street (or P.O. box number if mail is not delivered to street address) OCEAN REEF CLUB 21 MARINA VILLAGE		B Telephone number (216) 464-6901
City or town, state, and ZIP code KEY LARGO, FL 33037		C If exemption application is pending, 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		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,404,282.	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
(Part I, column (d) must be on cash basis.)		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).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check ☒ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		36,846.	36,846.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		36,254.			
b Gross sales price for all assets on line 6a 157,175.					
7 Capital gain net income (from Part IV, line 2)			36,254.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		73,100.	73,100.		
13 Compensation of officers, directors, trustees, etc.		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees					
c Other professional fees STMT 2		5,021.	5,021.		0.
17 Interest					
18 Taxes STMT 3		346.	346.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 4		300.	100.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		5,667.	5,467.		0.
25 Contributions, gifts, grants paid		96,500.			96,500.
26 Total expenses and disbursements. Add lines 24 and 25		102,167.	5,467.		96,500.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-29,067.			
b Net investment income (if negative, enter -0-)			67,633.		
c Adjusted net income (if negative, enter -0-)				N/A	

SCANNED JUN 06 2011

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		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	79,743.	22,984.	22,984.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶ 25,000.			
	Less: allowance for doubtful accounts ▶ 0.	25,000.	25,000.	25,000.
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations STMT 6	1,026.	960.	855.
	b Investments - corporate stock STMT 7	668,818.	605,024.	879,981.
	c Investments - corporate bonds STMT 8	371,289.	462,771.	475,462.
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	1,145,876.	1,116,739.	1,404,282.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
	Foundations that follow SFAS 117, check here ▶ ☒			
	and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	1,145,876.	1,116,739.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	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	1,145,876.	1,116,739.	
	31 Total liabilities and net assets/fund balances	1,145,876.	1,116,739.	

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	1,145,876.
2 Enter amount from Part I, line 27a	2	-29,067.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,116,809.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 5	5	70.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,116,739.

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.)
1a			
b SEE ATTACHED STATEMENT			
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 157,175.		120,921.	36,254.

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

(i) F.M.V. 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))
a			
b			
c			
d			
e			36,254.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	36,254.
3 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). If (loss), enter -0- in Part I, line 8 }	3	N/A

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 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	95,221.	1,249,967.	.076179
2008	90,000.	1,527,094.	.058935
2007	89,000.	1,784,139.	.049884
2006	97,000.	1,671,937.	.058017
2005	134,982.	1,623,240.	.083156

2 Total of line 1, column (d)	2	.326171
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	.065234
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	1,349,663.
5 Multiply line 4 by line 3	5	88,044.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	676.
7 Add lines 5 and 6	7	88,720.
8 Enter qualifying distributions from Part XII, line 4	8	96,500.

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 VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	676.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	676.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	676.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2010 estimated tax payments and 2009 overpayment credited to 2010	6a	1,320.	
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	1,320.	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ 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		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	644.	
11 Enter the amount of line 10 to be: Credited to 2011 estimated tax ☒ 644. Refunded ☐ 0.	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a 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 instructions for definition)? 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.		X
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. ☒ \$ 0. (2) On foundation managers. ☒ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☒ \$ 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
4a 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?		
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, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ OH		
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

N/A

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>HTTP://WWW.ACTIVISTCASH.COM/FOUNDATION.CFM/DID/14</u>	13	X	
14	The books are in care of ► <u>JACK W. LAMPL III</u> Telephone no. ► <u>(216) 491-3990</u> Located at ► <u>20820 CHAGRIN BLVD. #300, SHAKER HEIGHTS, OH</u> ZIP+4 ► <u>44122</u>			
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	N/A	
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?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ 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)?	☐ Yes ☒ 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.)	☐ Yes ☒ 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		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?		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? If "Yes," list the years ►	☐ Yes ☒ No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	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. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ 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	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		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)?

☐ 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)?

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

6b

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

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

7b

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

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.

(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
CAROLYN C. LAMPL OCEAN REEF CLUB 21 MARINA VILLAGE UNIT KEY LARGO, FL 33037	TRUSTEE 0.00	0.	0.	0.
JACK W. LAMPL III 998 WOODGROVE DRIVE CARDIFF, CA 92007	TRUSTEE 0.00	0.	0.	0.
JOSHUA C. LAMPL 3334 COUNTRY ROSE CIRCLE ENCINITAS, CA 92024	TRUSTEE 0.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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

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	1,275,468.
b	Average of monthly cash balances	1b	94,748.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,370,216.
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	1,370,216.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	20,553.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,349,663.
6	Minimum investment return. Enter 5% of line 5	6	67,483.

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	67,483.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	676.
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	676.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	66,807.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	66,807.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	66,807.

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	96,500.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	96,500.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	676.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	95,824.

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 instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				66,807.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005	58,356.			
b From 2006	17,330.			
c From 2007	2,230.			
d From 2008	14,612.			
e From 2009	33,281.			
f Total of lines 3a through e	125,809.			
4 Qualifying distributions for 2010 from Part XII, line 4: ► \$	96,500.			
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				66,807.
e Remaining amount distributed out of corpus	29,693.			
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:	155,502.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
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 instr.			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)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7	58,356.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	97,146.			
10 Analysis of line 9:				
a Excess from 2006	17,330.			
b Excess from 2007	2,230.			
c Excess from 2008	14,612.			
d Excess from 2009	33,281.			
e Excess from 2010	29,693.			

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
a Paid during the year				
SEE STATEMENT 10				
Total			3a	96,500.
b Approved for future payment				
NONE				
Total			3b	0.

THE LAMPL FAMILY FOUNDATION

CONTINUATION FOR 990-PF, PART IV

34-1499838

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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.)
1a	KEY BANK - SEE ATTACHED	P	VARIOUS	VARIOUS
b	KEY BANK - SEE ATTACHED	P	VARIOUS	VARIOUS
c	CARDINAL HEALTH INC	P	VARIOUS	VARIOUS
d	EL PASO CORP	P	VARIOUS	VARIOUS
e	MERRILL LYNCH & CO	P	VARIOUS	VARIOUS
f	PIMCO FUNDS	P	VARIOUS	VARIOUS
g	QWEST COMMUNICATIONS	P	VARIOUS	VARIOUS
h	ST PAUL TRAVELERS	P	VARIOUS	VARIOUS
i				
j				
k				
l				
m				
n				
o				

(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 44,841.		34,842.	9,999.
b 110,446.		86,079.	24,367.
c 188.			188.
d 11.			11.
e 332.			332.
f 1,161.			1,161.
g 80.			80.
h 116.			116.
i			
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			9,999.
b			24,367.
c			188.
d			11.
e			332.
f			1,161.
g			80.
h			116.
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	36,254.
3 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). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

I/AG 20

Totals

LAMPL NELLE E FOUNDATION I/AG 20
Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
15% RATE CAPITAL GAINS (LOSSES)					
5.26 GOVERNMENT NATL MTG ASSN 9/01/91 9% 09/15/2021	08/23/1991	01/15/2010	5.26	5.26	
5.3 GOVERNMENT NATL MTG ASSN 9/01/91 9% 09/15/2021	08/23/1991	02/15/2010	5.30	5.30	
5.35 GOVERNMENT NATL MTG ASSN 9/01/91 9% 09/15/2021	08/23/1991	03/15/2010	5.35	5.35	
5.39 GOVERNMENT NATL MTG ASSN 9/01/91 9% 09/15/2021	08/23/1991	04/15/2010	5.39	5.39	
190. COLGATE PALMOLIVE CO COM	04/22/2009	04/28/2010	15,964.67	11,394.30	4,570.37
255. QUALCOMM INC COM	04/22/2009	04/28/2010	9,743.28	10,404.00	-660.72
65. TRANSOCEAN LTD FGN COM	04/22/2009	05/05/2010	4,850.94	4,252.95	597.99
115. TRANSOCEAN LTD FGN COM	02/27/2009	05/05/2010	8,582.43	7,008.31	1,574.12
5.43 GOVERNMENT NATL MTG ASSN 9/01/91 9% 09/15/2021	08/23/1991	05/15/2010	5.43	5.43	
5.47 GOVERNMENT NATL MTG ASSN 9/01/91 9% 09/15/2021	08/23/1991	06/15/2010	5.47	5.47	
5.52 GOVERNMENT NATL MTG ASSN 9/01/91 9% 09/15/2021	08/23/1991	07/15/2010	5.52	5.52	
5.56 GOVERNMENT NATL MTG ASSN 9/01/91 9% 09/15/2021	08/23/1991	08/15/2010	5.56	5.56	
40. APPLE INC COM	02/08/2008	09/09/2010	10,566.62	4,925.94	5,640.68
300. COCA COLA CO COM	05/28/1993	09/09/2010	17,498.79	6,206.25	11,292.54
810. SCHWAB CHARLES CORP NEW	04/22/2009	09/09/2010	10,943.07	14,547.60	-3,604.53
300. TEXAS INSTRS INC COM	10/31/2002	09/09/2010	7,157.90	4,689.00	2,468.90
340. NOBLE CORP FGN COM	04/22/2009	09/09/2010	11,709.43	9,384.00	2,325.43
5.6 GOVERNMENT NATL MTG ASSN 9/01/91 9% 09/15/2021	08/23/1991	09/15/2010	5.60	5.60	
123. CVS/CAREMARK CORP COM	04/22/2009	10/08/2010	3,821.85	3,774.22	47.63
307. CVS/CAREMARK CORP COM	04/22/2009	10/08/2010	9,535.26	9,420.20	115.06
5.65 GOVERNMENT NATL MTG ASSN 9/01/91 9% 09/15/2021	08/23/1991	10/15/2010	5.65	5.65	
Totals					

LAMPL NELLE E FOUNDATION

JSA
0F0970 2 000

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDENDS - DOMESTIC	32,389.	0.	32,389.
DIVIDENDS - FOREIGN	3,638.	0.	3,638.
INTEREST - CORPORATE	819.	0.	819.
TOTAL TO FM 990-PF, PART I, LN 4	36,846.	0.	36,846.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
KEY TRUSTEE FEES	5,441.	5,441.		0.
VICTORY FUND FEE				
ADJUSTMENTS	-420.	-420.		0.
MISCELLANEOUS EFTPS BANK FEE	0.	0.		0.
TO FORM 990-PF, PG 1, LN 16C	5,021.	5,021.		0.

FORM 990-PF

TAXES

STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES PAID	346.	346.		0.
TO FORM 990-PF, PG 1, LN 18	346.	346.		0.

FORM 990-PF

OTHER EXPENSES

STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION FEE	100.	100.		0.
STATE FILING FEES	200.	0.		0.
TO FORM 990-PF, PG 1, LN 23	300.	100.		0.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	5
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DESCRIPTIONAMOUNT

NONTAXABLE DIVIDENDS-RETURN OF CAPITAL

70.

TOTAL TO FORM 990-PF, PART III, LINE 5

70.

FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	6
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
GNMA 9% DUE 9/15/21	X		960.	855.
TOTAL U.S. GOVERNMENT OBLIGATIONS			960.	855.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			960.	855.

FORM 990-PF

CORPORATE STOCK

STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
ABB LTD	8,204.	8,980.
AIR PRODUCTS & CHEMICALS INC	8,099.	11,824.
AMAZON COM INC	7,342.	16,200.
APPLE INC	12,931.	33,869.
AVON PRODUCTS INC	7,819.	10,316.
BANK OF NOVA SCOTIA	8,939.	10,010.
BANK OF NY MELLON CORP	3,423.	3,775.
BAXTER INTL INC	5,159.	5,315.
BURLINGTON NORTHERN SANTA FE	0.	0.
CHESAPEAKE ENERGY CORP.	0.	0.
CISCO SYSTEMS INC.	11,348.	14,768.
COCA COLA	8,606.	32,885.
COLGATE PALMOLIVE	0.	0.
CVS/CAREMARK CORP.	0.	0.
DIRECTV	0.	0.
DOVER CORP	8,179.	14,613.
EATON CORP	10,053.	13,196.
EOG RESOURCES	8,372.	13,254.
EXXON MOBIL	6,853.	7,678.
FREEPORT-MCMORAN COPPER & GOLD	20,633.	40,230.
GENZYME CORP	6,182.	8,544.
GOOGLE INC	9,738.	14,849.
HEWLETT PACKARD	13,484.	15,998.
INTEL CORP.	10,336.	13,564.
ISHARES MSCI EAFE INDEX FUND	54,018.	55,891.
ISHARES RUSSELL 2000 INDEX FUND	39,487.	58,680.
ISHARES S&P MIDCAP 400 INDEX FUND	71,892.	99,759.
JP MORGAN CHASE & CO	16,858.	19,089.
LOCKHEED MARTIN CORP	25,155.	24,469.
LOWES	6,400.	10,032.
MEDTRONIC INC	8,308.	10,200.
METLIFE INC	10,230.	11,110.
MICROSOFT CORP.	6,095.	8,931.
NOBLE CORP	0.	0.
ORACLE CORP	11,825.	18,780.
PEABODY ENERGY CORP	6,468.	15,995.
QUALCOMM INC	0.	0.
SCHLUMBERGER LTD	12,648.	22,128.
SCHWAB CHARLES CORP NEW	0.	0.
TARGET	2,412.	24,052.
TEVA PHARMACEUTICAL INDS LTD	13,168.	15,900.
TEXAS INSTRUMENTS	6,252.	13,000.
THERMO FISHER SCIENTIFIC INTL	17,133.	27,680.
TRANSOCEAN LTD	0.	0.
UNION PACIFIC CORP	9,844.	11,583.
UNITED TECHNOLOGIES CORP	14,163.	23,222.
VANGUARD EMERGING MARKETS ETF	85,349.	102,551.

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WELLS FARGO CO
XILINX INC

5,351.
6,268.

8,367.
8,694.

TOTAL TO FORM 990-PF, PART II, LINE 10B

605,024.

879,981.

FORM 990-PF

CORPORATE BONDS

STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
DODGE & COX INCOME FUND	231,810.	247,422.
ISHARES BARCLAYS TIPS BOND FUND	45,955.	47,846.
PIMCO FUNDS - TOTAL RETURN FUND	79,848.	78,174.
VICTORY FUND FOR INCOME FUND	105,158.	102,020.
TOTAL TO FORM 990-PF, PART II, LINE 10C	462,771.	475,462.

FORM 990-PF	GRANT APPLICATION SUBMISSION INFORMATION	STATEMENT	9
	PART XV, LINES 2A THROUGH 2D		

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

JACK W. LAMPL III

TELEPHONE NUMBER

FORM AND CONTENT OF APPLICATIONS

REQUESTS CAN BE IN THE FORM OF A LETTER DETAILING THE ORGANIZATION AND PURPOSE OF REQUEST.

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

USED WITHIN THE UNITED STATES OR ITS POSSESSIONS. NO GIFTS MADE TO NON-TRADITIONAL RELIGIOUS ORGANIZATIONS.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 10

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
ACCESS TO THE ARTS 12200 FAIRHILL ROAD CLEVELAND, OH 44120	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	500.
ALZHEIMER'S ASSOCIATION 23215 COMMERCE PARK BEACHWOOD, OH 44122	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	2,500.
CHATHAM COLLEGE WOODLAND ROAD PITTSBURGH, PA 15232	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	3,250.
CLEANTECH SAN DIEGO 4510 EXECUTIVE DRIVE, PLAZA ONE SAN DIEGO, CA 92121	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	10,000.
CLEVELAND BOTANICAL GARDEN 11030 EAST BLVD. CLEVELAND, OH 44106	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	1,000.
CLEVELAND FOODBANK 15500 S. WATERLOO ROAD CLEVELAND, OH 44194	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	5,000.
CLEVELAND INSTITUTE OF ART 11141 EAST BLVD. CLEVELAND, OH 44106	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	1,000.
CLEVELAND INSTITUTE OF MUSIC 11021 EAST BLVD. CLEVELAND, OH 44106	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	1,500.

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CLEVELAND MUSEUM OF ART 11150 EAST BLVD. CLEVELAND, OH 44106	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	6,000.
CLEVELAND ORCHESTRA 11001 EUCLID AVE. CLEVELAND, OH 44106	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	3,000.
CLEVELAND PLAYHOUSE 8500 EUCLID AVE. CLEVELAND, OH 44106	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	1,250.
CLEVELAND PUBLIC RADIO 1375 EUCLID AVE. CLEVELAND, OH 44115	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	1,000.
CLEVELAND SCHOLARSHIP PROGRAMS 200 PUBLIC SQUARE CLEVELAND, OH 44114	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	2,000.
ECDS PTO 3616 MANCHESTER AVENUE ENCINITAS, CA 92024	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	2,000.
GRAUER FOUNDATION FOR EDUCATION 1500 EL CAMINO REAL ENCINITAS, CA 92024	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	8,000.
GREAT LAKES THEATRE FESTIVAL 1501 EUCLID AVE. CLEVELAND, OH 44115	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	750.
HARVARD COLLEGE FUND 124 MT. AUBURN ST. CAMBRIDGE, MA 02138	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	1,000.
JEWISH COMMUNITY FEDERATION OF CLEVELAND 1750 EUCLID AVE. CLEVELAND, OH 44115	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	18,000.

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KEYS CHILDRENS FOUNDATION 24 DOCKSIDE LANE KEY LARGO, FL 33037	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	1,000.
MUSEUM OF CONTEMPORARY ART CLEVELAND 8501 CARNEGIE AVE. CLEVELAND, OH 44106	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	1,000.
OCEAN REEF CULTURAL CENTER 200 ANCHOR DRIVE KEY LARGO, FL 33037	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	1,000.
OCEAN REEF FOUNDATION - HAITI RELIEF PROGRAMS 200 ANCHOR DRIVE KEY LARGO, FL 33037	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	1,000.
OLD STONE FOUNDATION 91 PUBLIC SQUARE CLEVELAND, OH 44113	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	1,500.
OXFAM AMERICA 226 CAUSEWAY ST BOSTON, MA 02114	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	1,250.
TIDES FOUNDATION P.O. BOX 29903 SAN FRANCISCO, CA 94129	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	20,000.
UNIVERSITY HOSPITALS OF CLEVELAND P.O. BOX 74947 CLEVELAND, OH 44194	N/A OPERATING FUNDS FOR EXEMPT PURPOSE	N/A	2,000.

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

96,500.

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 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.

Type or print	Name of exempt organization	Employer identification number
	THE LAMPL FAMILY FOUNDATION	34-1499838
	Number, street, and room or suite no. If a P.O. box, see instructions. OCEAN REEF CLUB 21 MARINA VILLAGE, NO. A	
File by the due date for filing your return. See instructions.	City, town or post office, state, and ZIP code. For a foreign address, see instructions. KEY LARGO, FL 33037	

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

JACK W. LAMPL III

- The books are in the care of ► 20820 CHAGRIN BLVD. #300 - SHAKER HEIGHTS, OH 44122
Telephone No. ► (216) 491-3990 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 AUGUST 15, 2011, 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 the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

3a 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.	3a	\$	676.
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.	3b	\$	1,320.
c 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.	3c	\$	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.

LHA For Paperwork Reduction Act Notice, see Instructions.

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