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Department of the Treasury
Internal Revenue ServiceReturn of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

OMB No 1545-0052

2010

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

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

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

Name of foundation

EDWARD & LIDA ROBINSON CHARITABLE TRUST

A Employer identification number

47-0767603

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

PO BOX 241021

Room/suite

B Telephone number (see the instructions)

(402) 390-9932

City or town

OMAHA

State ZIP code

NE 68124-0521

H Check type of organization ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end of year
(from Part II, column (c), line 16)

\$ 4,652,030.

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

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

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 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 (att sch)			
	2	Chk <input type="checkbox"/> if the foundn is not req to att Sch B			
	3	Interest on savings and temporary cash investments			
	4	Dividends and interest from securities	113,244.	113,244.	
	5a	Gross rents			
	b	Net rental income or (loss)			
	6a	Net gain/(loss) from sale of assets not on line 10			
	b	Gross sales price for all assets on line 6a			
	7	Capital gain net income (from Part IV, line 2)			
	8	Net short-term capital gain			
	9	Income modifications			
	10a	Gross sales less returns and allowances			
b	Less: Cost of goods sold				
c	Gross profit/(loss) (att sch)				
11	Other income (attach schedule)				
12	Total. Add lines 1 through 11	113,244.	113,244.		
ADMINISTRATIVE EXPENSES	13	Compensation of officers, directors, trustees, etc	3,000.		
	14	Other employee salaries and wages			
	15	Pension plans, employee benefits			
	16a	Legal fees (attach schedule)			
	b	Accounting fees (attach sch)	1,000.		1,000.
	c	Other prof fees (attach sch)			
	17	Interest			
	18	Taxes (attach schedule)(see instr)	57,879.		57,879.
	19	Depreciation (attach sch) and depletion			
	20	Occupancy			
	21	Travel, conferences, and meetings			
	22	Printing and publications			
23	Other expenses (attach schedule)				
	OTHER	264.		264.	
24	Total operating and administrative expenses. Add lines 13 through 23	62,143.		59,143.	
25	Contributions, gifts, grants paid	452,400.		452,400.	
26	Total expenses and disbursements. Add lines 24 and 25	514,543.		511,543.	
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	-401,299.			
b	Net investment income (if negative, enter -0-)		113,244.		
c	Adjusted net income (if negative, enter -0-)				

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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
A S S E T S	1 Cash – non-interest-bearing	1,660.	1,660.	1,660.
	2 Savings and temporary cash investments	1,716,000.	2,183,000.	2,183,000.
	3 Accounts receivable			
	Less: allowance for doubtful accounts			
	4 Pledges receivable			
	Less: allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7 Other notes and loans receivable (attach sch)			
	Less: allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments – U.S. and state government obligations (attach schedule)			
	b Investments – corporate stock (attach schedule) L-10b Stmt	2,614,172.	2,619,678.	2,434,534.
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment: basis			
Less: accumulated depreciation (attach schedule)				
12 Investments – mortgage loans				
13 Investments – other (attach schedule)				
14 Land, buildings, and equipment: basis				
Less: accumulated depreciation (attach schedule)				
15 Other assets (describe L-15 Stmt)	903,641.	32,836.	32,836.	
16 Total assets (to be completed by all filers – see instructions. Also, see page 1, item I)	5,235,473.	4,837,174.	4,652,030.	
L I A B I L I T I E S	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe OUTSTANDING CHECKS)	3,535.	6,535.	
	23 Total liabilities (add lines 17 through 22)	3,535.	6,535.	
F U N D A S S E T S B A L A N C E S	Foundations that follow SFAS 117, check here 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 and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	5,231,938.	4,830,639.	
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see the instructions)	5,231,938.	4,830,639.	
	31 Total liabilities and net assets/fund balances (see the instructions)	5,235,473.	4,837,174.	

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	5,231,938.
2 Enter amount from Part I, line 27a	2	-401,299.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	4,830,639.
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	4,830,639.

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

1 a			
b			
c			
d			
e			

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

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

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

2 Capital gain net income or (net capital loss).

☐ If gain, also enter in Part I, line 7
☐ If (loss), enter -0- in Part I, line 7

2

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) (see the instructions). If (loss), enter -0- in Part I, line 8

3

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

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

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

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

☐ Yes☐ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2009			
2008			
2007			
2006			
2005			

2 Total of line 1, column (d)

2

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

4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5

4

5 Multiply line 4 by line 3

5

6 Enter 1% of net investment income (1% of Part I, line 27b)

6

7 Add lines 5 and 6

7

8 Enter qualifying distributions from Part XII, line 4

8

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

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

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary – see instr.)		1	2,265.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)		3	2,265.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
3 Add lines 1 and 2		5	2,265.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			
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 pmts and 2009 overpayment credited to 2010	6a	5,121.	
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	5,121.	
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	2,856.	
11 Enter the amount of line 10 to be Credited to 2011 estimated tax	11	2,856.	Refunded.

Part VIII Statements Regarding Activities

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

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Part VII-A Statements Regarding Activities (Continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>E. W. FITZGERALD</u> Telephone no. <u>(402) 390-9932</u> Located at <u>218 SOUTH 94TH ST OMAHA NE</u> ZIP + 4 <u>68114</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 <u>15</u>			
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If 'Yes,' enter the name of the foreign country	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
1 a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input 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 the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1 b	
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?	1 c	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 <u>20__ , 20__ , 20__ , 20__</u>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 the instructions)	2 b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. <u>20__ , 20__ , 20__ , 20__</u>		
3 a 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)	3 b	
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	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?	4 b	X

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

5b

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?

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

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?

7b

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

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

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JAMES ROUBAL 400 ESSEX COURT OMAHA NE 68114	TRUSTEE 1.00	0.	0.	0.
SHERRY RATHBURN 400 ESSEX COURT OMAHA NE 68114	TRUSTEE 1.00	3,000.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
0				
0				
0				
0				

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

None

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.'

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		None

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	
2	
3	
4	

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

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

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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	4,822,313.
b	Average of monthly cash balances	1b	
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	4,822,313.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	4,822,313.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	72,335.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,749,978.
6	Minimum investment return. Enter 5% of line 5.	6	237,499.

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	237,499.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	2,265.
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,265.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	235,234.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	235,234.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	235,234.

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	511,543.
b	Program-related investments — total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	511,543.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	511,543.

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

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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				235,234.
2 Undistributed income, if any, as of the end of 2010.				
a Enter amount for 2009 only				
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	19,892.			
d From 2008	134,264.			
e From 2009	281,046.			
f Total of lines 3a through e	435,202.			
4 Qualifying distributions for 2010 from Part XII, line 4 ▶ \$ 511,543.				
a Applied to 2009, but not more than line 2a				
b Applied to undistributed income of prior years (Election required — see instructions)				
c Treated as distributions out of corpus (Election required — see instructions)				
d Applied to 2010 distributable amount				235,234.
e Remaining amount distributed out of corpus	276,309.			
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	711,511.			
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				
d Subtract line 6c from line 6b. Taxable amount — see instructions		0.		
e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	711,511.			
10 Analysis of line 9:				
a Excess from 2006	0.			
b Excess from 2007	19,892.			
c Excess from 2008	134,264.			
d Excess from 2009	281,046.			
e Excess from 2010	276,309.			

BAA

Form 990-PF (2010)

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

N/A

- 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(1)(3) or

4942(1)(5)

- 2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed:

b 85% of line 2a

- c** Qualifying distributions from Part XII,
line 4 for each year listed

- d**
- Amounts included in line 2c not used directly for active conduct of exempt activities

- e** Qualifying distributions made directly for active conduct of exempt activities
Subtract line 2d from line 2c

- 3** Complete 3a, b, or c for the alternative test relied upon.

- a 'Assets' alternative test – enter:

- (1) Value of all assets

- (2) Value of assets qualifying under section 4942(i)(3)(B)(i)

- b** 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

- c 'Support' alternative test – enter:

- (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

- (2) Support from general public and 5 or more exempt organizations as provided in section 4942(i)(3)(B)(iii)

- (3) Largest amount of support from an exempt organization . . .

- (4) Gross investment income**

Part XV. **Supplementary Information** (Complete this part only if the organization had \$5,000 or more in assets at any time during the year – see 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).)

NONE

- 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.

None

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 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.

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

- c Any submission deadlines:

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

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
<i>a</i> Paid during the year SCHEDULE ATTACHED		509 (a) (1)	CHARITABLE	452,400.
Total			3a	452,400.
<i>b</i> Approved for future payment				
Total			3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1	Program service revenue.					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies . . .					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities			14	113,244.	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property .					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory . .					
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue					
a						
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)				113,244.	
13	Total. Add line 12, columns (b), (d), and (e)					113,244.

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

Part XVII. Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a Transfers from the reporting foundation to a noncharitable exempt organization of

- (1) Cash

- (2) Other assets**

b Other transactions

- (1) Sales of assets to a noncharitable exempt organization**

- (2) Purchases of assets from a noncharitable exempt organization**

- (3) Rental of facilities, equipment, or other assets**

- #### (4) Reimbursement arrangements

- (5) Loans or loan guarantees**

- (6) Performance of services or membership or fundraising solicitations**

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees

d If the answer to any of the above is 'Yes,' complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐ Yes ☒ No

b If 'Yes,' complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

**Sign
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Signature of _____ or trustee

Date _____

Title

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date _____

Check if ☒ if
self-employed

PTIN

P00666008

Firm's name

DAVID WOLFGRAM

Firm's address

10907 COTTONWOOD LANE

OMAHA

NE 68164

Phone no.

(402) 496-3111

BAA

EDWARD W FITZGERALD

218 SO 94 ST OMAHA, NE

68114

402-390-9932

PO0009490

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

► Attach to Form 990, 990-EZ, or 990-PF

OMB No 1545-0047

2010

Name of the organization

EDWARD & LIDA ROBINSON CHARITABLE TRUST

Employer identification number

47-0767603

Organization type (check one)

Filers of:

Form 990 or 990-EZ

Section:

- ☐ 501(c)() (enter number) organization
☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. (Complete Parts I and II.)

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ, that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ, that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ, that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc, purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc, purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc, contributions of \$5,000 or more during the year. ► \$ _____

Caution: An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF) but it **must** answer 'No' on Part IV, line 2 of their Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2010)

EDWARD AND LIDA ROBINSON CHARITABLE TRUST 2010 CONTRIBUTIONS

Organization donated to:	To The	Area	Phone	Address	City	St	Zip
Archdiocese & Parish Annual Appeal	ATTN Of:	(402)	558-3100	100 N 62nd St	Omaha	NE	68132
To honor pledge to the 2010 Annual Appeal	Not Needed						
ALS - Muscular Dystrophy Association	Doug Bickford - Executive Director	(402)	390-2914	4654 S 132nd St	Omaha	NE	68137
To provide funding for research							
Alzheimer's Association	Duane Gross - President	(402)	502-4300	1941 S 42nd St, Suite 205	Omaha	NE	68152
To provide services to families affected by Alzheimer's Disease and related dementias through the Respite Care Program							
Bellevue University	Dorothy Morrow	(402)	293-2000	1000 Galvin Road South	Bellevue	NE	68005
To provide financial aid to help a needy student reach his/her goal of furthering his/her education							
Catholic Charities	Kathy Fitzgerald Grandstaert - Sr. Dir Of Development	(402)	554-0520	3300 North 60th Street	Omaha	NE	68104
To support individuals and families through counseling programs							
Cedars Home for Children	James R. Blue - President	(402)	434-5437	6601 Pioneer Blvd, Suite #2	Lincoln	NE	68506
To provide support for families suffering from abuse and neglect through domestic violence							
Child Saving Institute	Wanda Gottschalk - Director of Development	(402)	553-6000	4545 Dodge St	Omaha	NE	68132
To support therapeutic care programs for teens and their families experiencing serious financial problems and problems associated with domestic violence							
Children's Hospital Foundation	Roger Lewis - Executive Director	(402)	955-5651	8401 W Dodge Road, Suite 160	Omaha	NE	68114
To support the Rainbow House which provides a home-like atmosphere for families spending many hours at the bedside of their ill child							
Children's Scholarship Fund of Omaha	Mary Jewell, Treasurer	(402)	554-8493	P O Box 4130	Omaha	NE	68104
To provide tuition assistance for children of low-income families							
Christ the King Campaign	Not Needed	(402)	391-3606	654 S 86th St	Omaha	NE	68114
To honor pledge to the 2010 Christ the King Campaign							
College of St Mary	Maryanne Stevens - President	(402)	399-2400	7000 Merry Road	Omaha	NE	68106
To support the tuition program for students interested in pursuing a career in the health field							
Creighton Prep	Father Tom Merkel - President	(402)	393-1190	7400 Western Avenue	Omaha	NE	68114
To provide tuition assistance for students with limited financial needs							
Daniel Gross Catholic High School	Lynn Couvillion Poly - Director of Development	(402)	734-2000	7700 South 42nd Street	Omaha	NE	68147
To support the 2010 Leadership Appeal and the Willett Scholarship Fund providing excellence in Catholic education and providing benefits to students in need of financial assistance							
Doane College	Jerry Wood - Vice President for Advancement	(402)	826-8258	1014 Boswell Ave	Crete	NE	68333
To provide financial assistance to students who do not receive scholarship funds							
Domestic Violence Coordinating Council	Karen Hadley - Executive Director	(402)	398-9928	8990 West Dodge Rd, Suite 205	Omaha	NE	68114
To supplement the funding for training and public awareness programs geared to stopping domestic violence							
Eastern Star Home for Children	Ron Giessefmann - Executive Director	(402)	721-1185	2415 N Main Street	Fremont	NE	68026
To provide a Christmas Party for boys and girls residing at the home who otherwise would not have had that holiday experience							
Folsom's Children's Zoo	John Chappo - Executive Director	(402)	475-6741	1222 South 27th Street	Lincoln	NE	68502
To provide underprivileged children the opportunity to spend a day at the zoo and attend educational opportunities							
Food Bank of Lincoln	Scott Young - Director	(402)	466-8170	4840 Dorr, Blair Circle #A	Lincoln	NE	68504
To assist with the transportation of food to agencies servicing needy families in Omaha							
Food Bank, The	Susan Ogborn - President	(402)	331-1213	6824 J St	Omaha	NE	68117
To assist with the transportation of food to agencies servicing needy families in Omaha							
Friendship Home Shelter	Amy Evans, Executive Director	(402)	434-0163	P O Box 85358	Lincoln	NE	68501
For Shelter and support for battered women and their children							
Good Shepherd Lutheran Home	Lols Pfeiffer - CEO/Administrator	(402)	426-3377	2242 Wmght Street	Blair	NE	68008
To initiate an endowment fund which would provide continuing education grants to employees in the health care field	Will Fax... Spoke with Loraine on 1/31/11						
Goodfellow's Charities	Joel Long - Executive Director	(402)	444-1493	1314 Douglas St, Suite 125	Omaha	NE	68102
To assist families of the Midlands who have nowhere else to turn for meals, eyeglasses, clothing and shoes							
Habitat for Humanity	Carla Patton	(402)	457-5657	2204 Ames Avenue	Omaha	NE	68110
Assist in the construction of a home for a needy family in North Omaha							
Heartland Family Service	Laura Luff	(402)	553-3000	2101 S 47nd St	Omaha	NE	68105
To provide support for individuals suffering with serious problems such as child abuse, domestic violence, addictions and poverty							
Henry Doory Zoo	Calvin R. Sisson - Executive Director	(402)	738-2073	8401 W Dodge Rd, Suite 100	Omaha	NE	68114
To underwrite field trips for underprivileged children to enjoy a day at the zoo and to participate in educational programs							

\$ 4,000.00	to enable low-income families to become homeowners and gain the sense of pride home ownership brings	Dr. Marilyn Ross	(402) 453-6100	3014 North 45th Street	Omaha	NE	68104
\$ 2,000.00	Homestead Girl Scout Council of Lincoln	Jenny Cardwell - Director of Fund Development	(402) 487-2578	1701 South 17th Street	Lincoln	NE	68502
\$ 3,500.00	To provide financial assistance to the camping program allowing financial disadvantaged youth to attend a camping experience	Fr. Jim Michalski - Principal	(402) 346-4464	2311 North 22nd Street	Omaha	NE	68110
\$ 1,500.00	To help support the Education Club in providing financial support to needy families through their tuition program and provide an interesting curriculum to all students	Judith Beasley - Office Manager	(402) 502-5767	2505 N 24th St Suite 201	Omaha	NE	68111
\$ 3,000.00	John Beasley Theater and Workshop	Kim Balkovek - mailed out Friday 1/28 - Will fax copy	(402) 554-5866	6001 Dodge St CB 200	Omaha	NE	68182
\$ 5,000.00	KYNO - University of Nebraska - Omaha	Brigitte Young	(402) 333-8999	11926 Arbor Street Suite 102	Omaha	NE	68144
\$ 2,000.00	To help make a "wish come true" for a Nebraska Child with a life threatening illness	Tricia Cottrell, Executive Director	(402) 697-0205	11213 Davenport Street Suite 201	Omaha	NE	68154
\$ 3,000.00	Merrymakers Association	Patricia Crisler	(402) 457-2346	30th & Fort St. P O Box 3777	Omaha	NE	68103
\$ 5,000.00	Metropolitan Community College	Mary McAlpine	(402) 850-3419	9927 Broadmoor Road	Omaha	NE	68114
\$ 2,500.00	Meyer Foundation for Disabilities	Lisa Brink - President	(402) 505-4000	328 S 72nd St	Omaha	NE	68114
\$ 1,500.00	Multiple Sclerosis Society	Jacqueline Hill	(402) 457-6425	4548 Saratoga St	Omaha	NE	68104
\$ 2,000.00	To provide a "Gateway Weekend" for people suffering from MS and their families to enjoy a time of relaxation and companionship	Karen Authier	(402) 451-0787	4939 S 118th St	Omaha	NE	68137
\$ 3,000.00	My Sister's Keeper	Michael Gerdes	(402) 556-2171	13478 Chandler Rd	Omaha	NE	68138
\$ 3,000.00	To help provide support to an individual dealing with the pain and expense of cancer	Tim Thompson	(402) 399-9565	10244 Wiseman Dr	Omaha	NE	68134
\$ 2,000.00	Nebraska Children's Home Society Foundation	John C. Furstenberg - President	(402) 457-7000	4343 North 52nd Street	Omaha	NE	68104
\$ 6,000.00	To assist NCHS in their work of matching adoptable children with parents	Toba Cohen-Dunning - Executive Director	(402) 557-2024	3215 Cumming St	Omaha	NE	68131
\$ 5,000.00	Nebraska Society of Professional Engineers Education Foundation	Candace L. Gregory - President/CEO	(402) 422-1111	2828 N 23rd St East	Omaha	NE	68108
\$ 2,500.00	To help students develop math skills for the 8th through 8th grade students in Nebraska Schools	Pastor Tom Barber	(402) 475-1303	110 Q St P O Box 80636	Lincoln	NE	68501
\$ 1,900.00	Omaha Christian Academy	Sadie Bankston	(402) 706+1861	P O Box 11506	Omaha	NE	68111
\$ 3,500.00	Omaha Home for Boys	John C. Fullerton - Executive Director	(402) 572-3003	7101 Newport Avenue #205	Omaha	NE	68152
\$ 2,500.00	To enhance the educational aspect of the program	Patricia Newman	(402) 930-2001	820 S 75th St	Omaha	NE	68114
\$ 6,000.00	Omaha Home for Boys	Kevin Warneke	(402) 346-9377	620 South 38th Avenue	Omaha	NE	68105
\$ 3,500.00	To promote support and care to at-risk and needy youth	Jennifer Jirak-Brungardt	(402) 397-7335	4089 S 84th St PMB 317	Omaha	NE	68114
\$ 2,500.00	Omaha Schools Foundation/Joslyn Art Museum field trips	Rev Thomas Fangman-Executive Director - Ext 21	(402) 451-5755	2207 Wirt Street	Omaha	NE	68110
\$ 5,000.00	To defray costs of a tour of 4th grade students of OPS to explore the art and history of our region at the Museum's Art of the American West Galleries	Donna K Hammack - Foundation Director	(402) 219-8000	6900 L Street Suite 100	Lincoln	NE	68510
\$ 2,500.00	Open Door Mission & Lydia House	Captain Jamie Pennington	(402) 474-6263	2625 Potter Street	Lincoln	NE	68503
\$ 1,900.00	To support the Open Door Mission and Lydia House meet the needs of homeless people by supplying food, clothing, shelter, counseling and minor medical services	Major Paul Smith	(402) 898-5900	3612 Cumming Street	Omaha	NE	68131
\$ 3,500.00	Peoples City Mission						
\$ 1,900.00	To provide support for homeless people in Lincoln						
\$ 3,500.00	PULSE						
\$ 2,500.00	To support grieving families and efforts in teaching at risk youths in the Omaha Area						
\$ 6,000.00	Radio Talking Book Services						
\$ 3,500.00	To provide supplies to visually disabled and blind persons with printed materials and receivers						
\$ 6,000.00	RE S P E C T						
\$ 3,500.00	To provide education opportunities for students through the scholarship fund program						
\$ 6,000.00	Ronald McDonald House of Omaha						
\$ 3,500.00	To provide supplies and operation costs as they continue to serve many families with sick children with lodging and assistance during a stay away from their homes						
\$ 6,000.00	Rotary Club of Omaha/Suburban						
\$ 3,000.00	To participate in the scholarship program for high school seniors with disabilities giving them confidence in their achievement while becoming productive members of our community						
\$ 4,000.00	Sacred Heart School						
\$ 3,000.00	To help cover tuition costs and support the Read to Achieve Program						
\$ 3,000.00	Saint Elizabeth Foundation						
\$ 4,000.00	To support the burn program at St. Elizabeth Regional Medical Center to purchase therapeutically approved supplies						
\$ 4,000.00	Salvation Army - Lincoln						
\$ 4,000.00	To provide food for hungry families, warm clothing for those who have none, and toys for children whose parents cannot afford them						
\$ 4,000.00	Salvation Army - Omaha						
\$ 4,000.00	To provide Christmas needs and support for ongoing year-round programs which benefit local families who are in need						

3	3,000.00	Scleroderma Research Foundation	AMY HEWITT	(415) 1834-9444 220 Montgomery St. Suite 1411	San Fran CA 94104
\$	6,000.00	Assist in the research to find a cure for scleroderma	Mike Saklar-Executive Director	(402) 341-1821 P O Box 217 Downtown Station	Omaha NE 68101
\$	5,000.00	To continue to support and care for the homeless and economically disadvantaged of our community	Richard Becker	(402) 323-3400 301 S 68th Street Place	Lincoln NE 68510
\$	10,000.00	Southeast Community College & Milford Campus	Fr. James Keller	(402) 734-1802 5301 S 36th St	Omaha NE 68107
\$	4,000.00	To provide financial assistance to needy students for emergency fees, books and supplies required for students to pursue their chosen vocation	Chandler Tyrell	(402) 483-7671 4720 Randolph Street	Lincoln NE 68510
\$	3,500.00	St. Peter Claver Cristo Rey Catholic High School	Sandy Parks	(402) 392-0404 2823 S 84th St	Omaha NE 68124
\$	80,000.00	To support the internship and college preparatory education programs for economically disadvantaged students	Glarence L. Castner	(402) 554-3333 2285 S 67th St Suite 200	Omaha NE 68106
\$	125,000.00	Tabitha Foundation	Amy Volk- Vice President	(402) 502-0300 2285 S 67th St Suite 200	Omaha NE 68106
\$	10,000.00	To be included in the Home Health Care and Hospice programs to assist individuals suffering from terminal illness allowing them to remain in their homes with care	James Summerfelt - President	(402) 342-5566 12565 W Center Rd. Suite 100	Omaha NE 68106
\$	2,000.00	Tangler Shrine Center	Robert Storey	(402) 345-5187 2679 Farnam St	Omaha NE 68131
\$	1,500.00	To support the Transportation Fund for transporting patients to Twin Cities Shrine Hospital for Children, Chicago Shrine Hospital in Chicago and the Galveston Shrine Hospital Burn Center in Texas	Jason Currie	(402) 597-9323 5062 South 108th St PMB 160	Omaha NE 68137
\$	2,500.00	University of Nebraska Foundation	Natalia J. Peart - CEO	(402) 345-6555 222 S 29th St	Omaha NE 68131
		Joint Venture with DLR Group (Ken West) - fund scholarships and other financial needs for students in the Durham School of Architecture Engineering and Construction			
		To be included in the following funds: Cancer Research Endowment (\$17,500), Memorial Nursing Scholarship (\$17,500), Memorial Geriatric Research Endowment (\$12,500), Bone Marrow Transplant and Related Cancer Research Endowment (\$10,000), The Center for Neurovirology and Neurodegenerative Disorders (\$30,000), and the Team Zachary Grant Watch Program for blood related cancer research (\$30,000)			
		Visiting Nurse Association			
		To be included in the Home Health Care Program to assist patients to be able to live in their homes			
		Youth Emergency Services			
		Providing a Drop-in center to furnish basic health care, short term shelter and other living essentials			
		Youth for Christ of Greater Omaha			
		To teach youth and families through Campus Life Ministries			
		YWCA - Omaha			
		To help fund for domestic violence & sexual assault			
		Omaha Schools - gave amount in September 2010			
		Pulse - previously gave \$900 in March 2010			
		St. Peter Claver - No additional at this time, gave \$10,000 in May 2010			

Form 990-PF, Page 2, Part II, Line 10b

L-10b Stmt

Line 10b - Investments - Corporate Stock:	End of Year	
	Book Value	Fair Market Value
MUTUAL FUNDS HELD AT MORGAN STANLEY SMITH BARNEY	1,071,191.	899,187.
87,684 SHARES PFIZER COMMON STOCK	1,548,487.	1,535,347.
Total	<u>2,619,678.</u>	<u>2,434,534.</u>

Form 990-PF, Page 2, Part II, Line 15

Other Assets Stmt

Line 15 - Other Assets:	Beginning Year Book Value	End of Year	
		Book Value	Fair Market Value
OTHER CASH	903,641.	27,715.	27,715.
PREPAID EXCISE TAX	0.	5,121.	5,121.
Total	<u>903,641.</u>	<u>32,836.</u>	<u>32,836.</u>

Supporting Statement of:

Form 990-PF, p2/Line 10b(a)

Description	Amount
MUTUAL FUNDS HELD AT MORGAN STANLEY SMITH BARNEY	1,065,673.
87,684 SHARES PFIZER COMMON STOCK	1,548,499.
Total	<u>2,614,172.</u>