Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2010

For calendar year 2010, or tax year beginning , 2010, and ending , 20

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 TODD AND BETIANA SIMON FOUNDATION	**A Employer identification number** 47 0820673
Number and street (or P O box number if mail is not delivered to street address) 11030 O STREET — Room/suite	**B** Telephone number (see page 10 of the instructions) 402 597 8115
City or town, state, and ZIP code OMAHA, NE 68137-2346	**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 ▶ ☐
H Check type of organization: ☑ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation	**E** If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐
I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶ $ 3436238 **J** Accounting method: ☑ Cash ☐ Accrual ☐ Other (specify) *(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) (see page 11 of the instructions).)*

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc, received (attach schedule)	1225000			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	6815	4413		
	4	Dividends and interest from securities	83004	83004		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	26832			
	b	Gross sales price for all assets on line 6a 308502				
	7	Capital gain net income (from Part IV, line 2)		26832		
	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) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	1341651	114249	N/A	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)	13187	13187		
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions)	2054	2054		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	199	199		
	24	**Total operating and administrative expenses.** Add lines 13 through 23	15440	15440		0
	25	Contributions, gifts, grants paid	415530			415530
	26	**Total expenses and disbursements.** Add lines 24 and 25	430970	15440		415530
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	910681			
	b	**Net investment income** (if negative, enter -0-)		98809		
	c	**Adjusted net income** (if negative, enter -0-)			N/A	

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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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	749671	912737	912737
	3 Accounts receivable ▶ 501			
	Less: allowance for doubtful accounts ▶	4205	501	501
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)		500	500
	7 Other notes and loans receivable (attach schedule) ▶			
	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)	1542322	2293141	2522500
	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 ▶)			
	16 **Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	2296198	3206879	3436238
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)			
Net Assets or Fund Balances	**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	100	100	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	2296098	3206779	
	30 **Total net assets or fund balances** (see page 17 of the instructions)	2296198	3206879	
	31 **Total liabilities and net assets/fund balances** (see page 17 of the instructions)	2296198	3206879	

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	2296198
2	Enter amount from Part I, line 27a	2	910681
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	3206879
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	3206879

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	PUBLICLY TRADED SECURITIES			
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	308502		281670	26832
b				
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
	(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	
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	26832
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 pages 13 and 17 of 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 page 18 of the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2009	322611	2349487	.137311
2008	265290	2488444	.106609
2007	178427	2108946	.084605
2006	184587	1321177	.139714
2005	69030	514274	.134228

2	**Total** of line 1, column (d)	2	.602467
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	.120493
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	2561461
5	Multiply line 4 by line 3	5	308638
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	988
7	Add lines 5 and 6	7	309626
8	Enter qualifying distributions from Part XII, line 4	8	415530

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the 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	988	
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	-0-	
3	Add lines 1 and 2	3	988	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	-0-	
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	988	
6	Credits/Payments:			
a	2010 estimated tax payments and 2009 overpayment credited to 2010 — 6a: 481			
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	481	
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	507	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10		
11	Enter the amount of line 10 to be: **Credited to 2011 estimated tax** ▶ — **Refunded** ▶	11		

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?	1a		✓
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		✓
	*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?	1c		✓
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.*	2		✓
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*	3		✓
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		✓
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		✓
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?	6	✓	
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*	7	✓	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ 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*	8b	✓	
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 on page 27)? *If "Yes," complete Part XIV*	9		✓
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		✓

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

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		✓
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✓	
	Website address ▶			
14	The books are in care of ▶ TODD D SIMON Telephone no. ▶ 402 597 8115 Located at ▶ 11030 O STREET, OMAHA, NE ZIP+4 ▶ 68137 2346			
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			
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		✓
	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 ▶			

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)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?	1c		✓
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? ☐ Yes ☑ No If "Yes," list the years ▶ 20____ , 20____ , 20____ , 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see page 22 of the instructions.)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ 20____ , 20____ , 20____ , 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ 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.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		✓
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?	4b		✓

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

			Yes	No
5a	During the year did the foundation pay or incur any amount to:			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?	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 page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
TODD D SIMON 9709 ASCOT DR., OMAHA, NE 68114	PRES & TREAS < 5	-0-	-0-	-0-
BARBARA GOLDSTEIN 1349 S 101ST ST., OMAHA, NE 68124	SECRETARY < 1	-0-	-0-	-0-
JOANNA FRENCH 1036 WINSOR AVE., OAKLAND, CA 94610	VICE PRESIDENT < 1	-0-	-0-	-0-

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."

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

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

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See page 24 of the instructions 3	
Total. Add lines 1 through 3 . . . ▶	

Part X **Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	2072040
b	Average of monthly cash balances	1b	527973
c	Fair market value of all other assets (see page 25 of the instructions)	1c	455
d	**Total** (add lines 1a, b, and c)	1d	2600468
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	2600468
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	39007
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2561461
6	**Minimum investment return.** Enter 5% of line 5	6	128073

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

1	Minimum investment return from Part X, line 6			1	128073
2a	Tax on investment income for 2010 from Part VI, line 5	2a	988		
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	988
3	Distributable amount before adjustments Subtract line 2c from line 1			3	127085
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	127085
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	127085

Part XII **Qualifying Distributions** (see page 25 of the 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	415530
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	415530
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	988
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	414542

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

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

		(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1	Distributable amount for 2010 from Part XI, line 7				127085
2	Undistributed income, if any, as of the end of 2010:				
a	Enter amount for 2009 only			0	
b	Total for prior years: 20___,20___,20___		0		
3	Excess distributions carryover, if any, to 2010:				
a	From 2005 — 43736				
b	From 2006 — 119888				
c	From 2007 — 74649				
d	From 2008 — 141545				
e	From 2009 — 205579				
f	**Total** of lines 3a through e	585397			
4	Qualifying distributions for 2010 from Part XII, line 4: ▶ $ 415530				
a	Applied to 2009, but not more than line 2a			0	
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions)	0			
d	Applied to 2010 distributable amount				127085
e	Remaining amount distributed out of corpus	288445			
5	Excess distributions carryover applied to 2010 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	0			0
6	**Enter the net total of each column as indicated below:**				
a	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	873842			
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 page 27 of the instructions		0		
e	Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount—see page 27 of the 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 page 27 of the instructions)	0			
8	Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions)	43736			
9	**Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a	830106			
10	Analysis of line 9:				
a	Excess from 2006 — 119888				
b	Excess from 2007 — 74649				
c	Excess from 2008 — 141545				
d	Excess from 2009 — 205579				
e	Excess from 2010 — 288445				

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

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

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

	Tax year (a) 2010	Prior 3 years (b) 2009	(c) 2008	(d) 2007	(e) Total
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(j)(3)(B)(i)					
b "Endowment" alternative test—enter ⅔ 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(j)(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 foundation had $5,000 or more in assets at any time during the year—see page 28 of the instructions.)

1 Information Regarding Foundation Managers:

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

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 page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

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
a *Paid during the year*				
SEE ATTACHED SCHEDULE				
Total . . . . . . ▶ 3a				415530
b *Approved for future payment*				
Total . . . . . . ▶ 3b				-0-

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	6815	
4 Dividends and interest from securities			14	83004	
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			18	26832	
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)				116651	

13 **Total.** Add line 12, columns (b), (d), and (e) 13 116651

(See worksheet in line 13 instructions on page 29 to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 29 of the instructions.)
	N/A

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

			Yes	No
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	1a(1)		✓
	(2) Other assets	1a(2)		✓
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		✓
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		✓
	(3) Rental of facilities, equipment, or other assets	1b(3)		✓
	(4) Reimbursement arrangements	1b(4)		✓
	(5) Loans or loan guarantees	1b(5)		✓
	(6) Performance of services or membership or fundraising solicitations	1b(6)		✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		✓

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.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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 officer or trustee | 5-13-11 Date | PRESIDENT Title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN

Firm's name ▶ | Firm's EIN ▶

Firm's address ▶ | Phone no

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	**Employer identification number**
THE TODD AND BETIANA SIMON FOUNDATION	47 0820673

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 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 33⅓ % 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 its 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).

Name of organization	Employer identification number
THE TODD AND BETIANA SIMON FOUNDATION	47 0820673

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	OMAHASTEAKS.COM, INC 11030 O STREET OMAHA, NE 68137-2346	$ 1225000	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

THE TODD AND BETIANA SIMON FOUNDATION E.I.N. 47-0820673
FOR THE YEAR ENDED 12/31/10
SCHEDULE OF INFORMATION FOR FORM 990-PF

PART I, LINE 16c, OTHER PROFESSIONAL FEES:

Credit Suisse	Investment management fee	$13,187
	Total	$13,187

PART I, LINE 18, TAX EXPENSE:

Credit Suisse	foreign tax on dividends	$2,054
	Total	$2,054

PART I, LINE 23, OTHER EXPENSES:

Credit Suisse	ADR fees on foreign dividends	$199
	Total	$199

PART II, LINE 6, RECEIVABLES DUE FROM OFFICERS, ETC

Good faith estimate of fair-market value of goods and services provided by donee organizations, primarily free admission to the donee organizations facilities, which Todd Simon, President, has subsequently reimbursed to the Foundation, even though any benefit received by him would have been either incidental or tenuous.	$500

THE TODD AND BETIANA SIMON FOUNDATION E.I.N. 47-0820673
FOR THE YEAR ENDED 12/31/10
SCHEDULE OF INFORMATION FOR FORM 990-PF

PART II, LINE 10b, INVESTMENTS - SECURITIES

Corporate Name	No. of Shares	Book Value	Fair market value
BARCLAYS BK PLC IPATH INDEX	1200	48,489.00	58,943.88
CALAMOS CONVERTIBLE FD CL C	2900.298	52,932 19	56,613.82
ISHARES TR MSCI EAFE INDEX FD	2824.655	152,839.03	164,451.42
LORD ABBETT FLOATING RATE CL C	16697 442	154,450.17	155,954.11
NEW WORLD FD CL A	1146.739	51,516.61	62,600.48
OPPENHEIMER SNR FLOATING RT FD C	6856.187	56,974.91	56,906.35
PIMCO TOTAL RETURN FUND	14512.096	160,363.23	157,456.24
SPDR S&P 500 ETF TR	1672.903	177,044.27	210,367.48
TCW TOTAL RETURN BOND FD CL N	31002.018	324,860.58	318,080.71
TEMPLETON GLOBAL BOND FD CL C	11876.332	156,094.84	161,755.64
US TREAS NTS INFLATION INDEXED	75000	76,274.47	80,159.58
UNITED STATES TREAS NTS INFLATION	95000	97,754.37	99,847.43
VANGUARD REIT INDEX FD	4100.898	53,267 47	75,374.51
ABBOTT LABS	220	11,099.11	10,540.20
ARCHER DANIELS MIDLAND	335	9,446.39	10,076.80
CHEVRON CORP	135	10,325.44	12,318.75
CONOCOPHILLIPS	180	10,029.10	12,258.00
DIAGEO PLC SPONS ADR	145	9,600.32	10,777 85
HUDSON CITY BANCORP	745	9,820.74	9,491 30
ILLINOIS TOOL WORKS	130	5,324.31	6,942.00
INTEL CORP	470	9,105.52	9,884.10
KIMBERLY CLARK	150	9,253.23	9,456.00
KINDER MORGAN MGMT LLC	214.89324	9,515.88	14,372.06
KONINKLUKE PHILIPS ELECTRS N V	345	10,612 55	10,591.50
KRAFT FOODS INC	340	9,352 89	10,713.40
LOCKHEED MARTIN CORP	140	9,722.51	9,787.40
MCDONALDS CORP	160	9,507.20	12,281.60
NOVARTIS AG SPONS ADR	170	8,955.60	10,021.50
OMNICOM GROUP INC	150	5,308.82	6,870.00
PAYCHEX INC	300	8,509.27	9,273.00
PEARSON PLC SPONS ADR	680	9,538.77	10,805 20
PEPSICO INC	150	9,200.87	9,799 50
PFIZER INC	625	10,729.60	10,943.75
PHILIP MORRIS INTL	190	9,239.13	11,120.70
TAIWAN SEMICONDUCTOR MFG	875	8,537.47	10,972.50
TEXAS INSTRUMENTS	355	8,598.32	11,537.50
VERIZON COMMUNICATIONS COM	290	8,057.29	10,376.20
WASTE MGMT INC	310	9,553.36	11,429.70
ABB LTD SPONS ADR	340	6,264.14	7,633.00
ALLIANZ SE SPONS ADR	230	2,635.80	2,744.82
ASTRAZENECA PLC SPONS ADR	40	1,799.56	1,847.60
BAE SYS PLC	240	5,063.93	4,960.08
BAYER AG	90	6,460.84	6,646.68
BHP BILLITON LTD SPONS ADR	90	6,345.65	8,362.80
BNP PARIBAS SPONS ADR	240	8,059.26	7,664.40
BOC HONG KONG HLDGS SPONS ADR	140	6,458.76	9,527.00
BRITISH AMERN TOB PLC	120	7,677.49	9,324.00
CHUNGHWA TELECOM CO LTD	176	4,041.80	5,559.40
COMPANHIA ENERGETICA DE MINAS GE	506	7,230.83	8,394.54
COMPANHIA SIDERURGICA NACIONAL	360	5,858.08	6,001.20
DIAGEO PLC	100	6,522.95	7,433.00
ENERPLUS CORP	220	4,741.29	6,784.80
ENI SPA	70	3,472.67	3,061.80
FOSTERS BREWING GRP	1470	7,203.00	8,558.34
FRANCE TELECOM	180	4,174 85	3,794.40
GDF SUEZ	110	4,662 31	3,962.20
HOPEWELL HLDGS LTD	850	2,557 06	2,668.15
HSBC HLDGS PLC	120	6,760.29	6,124.80

THE TODD AND BETIANA SIMON FOUNDATION E.I.N. 47-0820673
FOR THE YEAR ENDED 12/31/10
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ITAU UNIBANCO HLDG SA NS	300	6,478.15	7,203.00
MTN GROUP LTD	280	5,526.47	5,689.04
MUNICH RE GROUP	270	4,293.00	4,107.24
NESTLE SA	160	7,462.40	9,398.08
NOKIA CORP	210	2,798.49	2,167.20
NOVARTIS AG	140	7,293.65	8,253.00
PETROCHINA CO LTD	55	6,581.30	7,231.95
PRIMARIS RETAIL REAL ESTATE INVT TI	160	2,330.42	3,132.64
RIOCAN REAL ESTATE INVESTMENT TR	120	2,040.69	2,645.28
ROCHE HLDGS LTD SPONS ADR	170	6,035.10	6,246.65
ROYAL DUTCH SHELL	130	8,179.37	8,667.10
RWE AG	30	2,647.20	2,012.73
SIEMENS A G SPONS ADR	80	7,228.75	9,940.00
SILICONWARE PRECISION INDS LTD	600	4,002.39	3,570.00
SINGAPORE AIRLS LTD	220	5,468.19	5,255.14
SINGAPORE TELECOMMUNICATIONS	120	2,502.00	2,857.08
TAIWAN SEMICONDUCTOR MFG	690	6,533.75	8,652.60
TELEFONICA S A ADR	210	5,884.12	4,789.40
TESCO PLC SPON ADR	380	7,357.48	7,585.56
TOTAL S A	120	7,171.18	6,417.60
UNILEVER NV NEW YORK	280	8,648.98	8,792.00
UNITED OVERSEAS BK	230	5,623.50	6,535.22
VERMILLION ENERGY INC	80	2,106.30	3,754.80
VODAFONE GROUP PLC	280	6,218.58	7,400.40
ZURICH FINL SVCS	270	5,974.13	7,015.68
ADVENT SOFTWARE	276	5,230 96	7,992.96
ALBEMARLE CORP	205	6,504 28	11,434.90
ALEXANDER & BALDWIN INC	357	10,409.89	14,290.71
ALLEGHANY CORP	21	5,255.97	6,433.77
AOL INC	370	8,041.43	8,772.70
ATWOOD OCEANICS	367	12,168.07	13,714.79
CABELAS INC	620	7,691 72	13,485.00
CAPELLA ED CO	157	10,063 31	10,453.06
CARMAX INC	201	3,949 63	6,407.88
CONSTELLATION BRANDS INC	379	7,069.41	8,394 85
CORRECTIONS CORP AMER	497	12,285.77	12,454 82
EATON VANCE CORP	186	5,238.50	5,622 78
ENERGIZER HLDGS	98	5,652.45	7,144 20
FIRST INDL RLTY TR INC	547	4,641.54	4,791 72
FORCE PROTIN	1407	7,525.96	7,752.57
HASBRO INC	162	4,414 21	7,643.16
HATTERAS FINL CORP	249	7,061.84	7,537.23
KINDER MORGAN MGMT LLC	151.4571	6,425.94	9,956.28
KNOLL INC	307	2,927.55	5,136.11
MARTIN MARIETTA MATERIAL INC	76	6,608.31	7,010.24
MBIA INC	1055	8,777.87	12,649.45
MICREL INC	581	5,867.48	7,547.19
MONTPELIER RE HOLDINGS LTD	567	8,986.04	11,305.98
NEWMARKET CORP	133	12,927.51	16,408.21
OLD DOMINION FREIGHT LINE	370	8,773.37	11,836.30
OWENS AND MINOR INC	183	7,420.46	5,385.69
PRICESMART INC	364	7,080.07	13,842.92
SERVICE CORP INTL	1222	8,247.52	10,081.50
STURM RUGER & CO	362	3,977.73	5,534.98
TEJON RANCH CO	276	6,912.91	7,603 80
TENET HEALTHCARE	1715	8,635.38	11,473.35
TREDEGAR CORP	580	7,763.42	11,240.40
UDR INC	330	4,731 91	7,761.60
VALUECLICK INC	737	8,525 65	11,814.11
WESCO FINL CORP	10	3,259.00	3,684.10
WHITE MOUNTAINS INSURANCE GROUI	19	5,907.10	6,376.40
		2,293,141.14	2,522,500.27

THE TODD AND BETIANA SIMON FOUNDATION E.I.N. 47-0820673
FOR THE YEAR ENDED 12/31/10
SCHEDULE OF INFORMATION FOR FORM 990-PF

PART XV SUPPLEMENTARY INFORMATION
3 a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	IF INDIVIDUAL, RELATIONSHIP TO MANAGER	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
AMERICAN FOUNDATION FOR EQUAL RIGHTS LOS ANGELES, CA 90071	N/A	PUBLIC	SUPPORT DEFENSE OF EQUAL RIGHTS FOR AMERICAN CITIZENS	5,000
ARTHRITIS FOUNDATION OMAHA, NE 68114	N/A	PUBLIC	SUPPORT ARTHRITIS RESEARCH	1,500
ASPEN ART MUSEUM ASPEN, CO 81611	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	500
BALLET NEBRASKA OMAHA, NE 68106	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	1,000
BEMIS CENTER FOR CONTEMPORARY ARTS OMAHA, NE 68102	N/A	PUBLIC	SUPPORT ARTISTS-IN-RESIDENCE PROGRAM	70,000
BLUEBARN THEATRE OMAHA, NE 68102	N/A	PUBLIC	SUPPORT PERFORMING ARTISTS	500
BOYS AND GIRLS CLUBS OF THE MIDLANDS OMAHA, NE 68131	N/A	PUBLIC	SUPPORT YOUTH DEVELOPMENT PROGRAMS	5,000
BROWNVILLE CONCERT SERIES BROWNVILLE, NE 68321	N/A	PUBLIC	ENHANCE THE QUALITY OF LIFE IN SOUTHEAST NEBRASKA	500
CAMP FIRE USA OMAHA, NE 68131	N/A	PUBLIC	AFTER SCHOOL PROGRAMS DIRECTED AT DISADVANTAGED CHILDREN	5,000
CENTER FOR INDEPENDENT DOCUMENTARY SHARON, MA 02067	N/A	PUBLIC	GRANT FOR THE PRODUCTION OF THE DOCUMENTARY "COOKED"	25,000
CENTER FOR JEWISH EDUCATION OMAHA, NE 68154	N/A	PUBLIC	SPONSOR 9TH ANNUAL JEWISH OMAHA FILM FESTIVAL	1,000
CENTRO CRISTIANO LA ROCA OMAHA, NE 68107	N/A	PUBLIC	SUPPORT RELIGIOUS EDUCATION	50
CHRISTIAN URBAN EDUCATION SERVICE OMAHA, NE 68110	N/A	PUBLIC	SUPPORT YOUTH DEVELOPMENT PROGRAMS	1,000
DURHAM WESTERN HERITAGE MUSEUM OMAHA, NE 68108	N/A	PUBLIC	SUPPORT PROVISION OF CULTURAL RESOURCE WITHIN THE COMMUNITY	1,000
EMERGING TERRAIN INC OMAHA, NE 68104	N/A	PUBLIC	SUPPORT GRAIN ELEVATOR MURAL PROJECT	6,000
FILM STREAMS OMAHA, NE 68102	N/A	PUBLIC	SUPPORT FILM AS ART EXHIBITIONS	26,000
FONTENELLE NATURE ASSOCIATION OMAHA, NE	N/A	PUBLIC	SUPPORT NATURE CONSERVANCY	50
FOREST CONSERVANCY CARBONDALE, CO 81623	N/A	PUBLIC	SUPPORT NATURE CONSERVANCY	500
FRIENDS OF IPTV JOHNSTON, IA 50131	N/A	PUBLIC	SUPPORT KIDS' EDUCATIONAL PROGRAMMING	240
GRANTMAKERS IN THE ARTS SEATTLE, WA 98119	N/A	PUBLIC	SUPPORT IMPROVEMENT OF ARTS PHILANTHROPY	400

THE TODD AND BETIANA SIMON FOUNDATION E.I.N. 47-0820673
FOR THE YEAR ENDED 12/31/10
SCHEDULE OF INFORMATION FOR FORM 990-PF

PART XV SUPPLEMENTARY INFORMATION
3 a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	IF INDIVIDUAL, RELATIONSHIP TO MANAGER	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
HIKE TO HELP REFUGEES, INC PACIFIC JUNCTION, IA	N/A	PUBLIC	SUPPORT HUMANITARIAN WORK OF THE UN REFUGE AGENCY	200
INSTITUTE FOR JUSTICE ARLINGTON, VA 22203	N/A	PUBLIC	SUPPORT PROTECTION OF CITIZENS RIGHTS	5,000
INTERNATIONAL MEDICAL CORPS SANTA MONICA, CA 90404	N/A	PUBLIC	SUPPORT HAITI EARTHQUAKE RELIEF EFFORTS	5,000
INTERNATIONAL SCULPTURE CENTER HAMILTON, NJ 08619	N/A	PUBLIC	SUPPORT ART PROGRAMS	1,000
JEWISH FAMILY SERVICES OMAHA, NE 68154	N/A	PUBLIC	ASSISTANCE TO INDIGENT FAMILIES	2,500
JOSLYN ART MUSEUM OMAHA, NE 68102	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	2,000
JOSLYN CASTLE TRUST OMAHA, NE 68131	N/A	PUBLIC	SUPPORT PRESERVATION OF THE JOSLYN CASTLE	1,500
JUVENILE DIABETES RESEARCH FOUNDATION OMAHA, NE	N/A	PUBLIC	PROMOTE JUVENILE DIABETES HEALTH RESEARCH	3,000
KANEKO OMAHA, NE 68102	N/A	PUBLIC	SUPPORT ART EDUCATION PROGRAMS	1,000
KENT BELLOWS STUDIO OMAHA, NE 68105	N/A	PUBLIC	SUPPORT PUBLIC ART EXHIBITION	600
LATINO CENTER OF THE MIDLANDS OMAHA, NE 68107	N/A	PUBLIC	SUPPORT EMPLOYABILITY OF LATINO YOUTH	1,000
THE LEUKEMIA & LYMPHOMA SOCIETY OMAHA, NE	N/A	PUBLIC	PROMOTE LEUKEMIA HEALTH RESEARCH	1,000
LAURITZEN GARDENS OMAHA, NE 68108	N/A	PUBLIC	SUPPORT AREA BOTONICAL CENTER	1,000
LEGAL AID OF NEBRASKA OMAHA, NE 68102	N/A	PUBLIC	SUPPORT PROVISION OF LEGAL SERVICES TO LOW-INCOME NEBRASKANS	5,000
METROPOLITAN COMMUNITY COLLEGE FOUNDATION OMAHA, NE 68103	N/A	PUBLIC	SUPPORT GREAT PLAINS THEATRE CONFERENCE FUND	13,890
MUSEUM OF NEBRASKA ART KEARNEY, NE 68847	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	1,000
NATURE CONSERVANCY IN NEBRASKA OMAHA, NE 68102	N/A	PUBLIC	SUPPORT THE SAFEGUARDING OF PRECIOUS LANDS AND WATERS	1,000
NEBRASKA COALITION FOR LIFESAVING CURES OMAHA, NE 68114	N/A	PUBLIC	PROMOTE MEDICAL RESEARCH	2,000
NEBRASKA MEDICAL CENTER OMAHA, NE 68198	N/A	PUBLIC	SPONSOR "POLO FOR PATIENTS"	500
OMAHA CHILDREN'S MUSEUM OMAHA, NE	N/A	PUBLIC	SUPPORT YOUTH ACTIVITIES PROGRAMS	500

THE TODD AND BETIANA SIMON FOUNDATION E.I.N. 47-0820673
FOR THE YEAR ENDED 12/31/10
SCHEDULE OF INFORMATION FOR FORM 990-PF

PART XV SUPPLEMENTARY INFORMATION
3 a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	IF INDIVIDUAL, RELATIONSHIP TO MANAGER	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
OMAHA CONSERVATORY OF MUSIC OMAHA, NE	N/A	PUBLIC	SUPPORT MUSICAL DEVELOPMENT PROGRAMS FOR YOUTH	2,500
OMAHA CREATIVE INSTITUTE OMAHA, NE 68102	N/A	PUBLIC	SUPPORT PERFORMING ARTS EDUCATION	1,000
OMAHA PUBLIC SCHOOLS, KIOS-FM OMAHA, NE 68131	N/A	PUBLIC	SUPPORT PUBLIC RADIO BROADCASTING	1,000
PARTNERSHIP FOR OUR KIDS OMAHA, NE 68102	N/A	PUBLIC	FUND CAREER EXPLORATION ACADEMY FOR SOUTH OMAHA	8,350
PLANNED PARENTHOOD OF THE HEARTLAND OMAHA, NE 68132	N/A	PUBLIC	FOR REPRODUCTIVE HEALTH CARE AND SEXUAL EDUCATION	30,000
PREVENT BLINDNESS NEBRASKA OMAHA, NE 68106	N/A	PUBLIC	SUPPORT "SENSORY SENSATIONS" EVENT	500
PROGRESS NOW EDUCATION FUND DENVER, CO 80202	N/A	PUBLIC	PROVIDE SUPPORT FOR TRAINING AND EDUCATION	3,000
PROJECT HARMONY OMAHA, NE 68117	N/A	PUBLIC	SUPPORT PROVISION OF SERVICES TO VICTIMS OF CHILD ABUSE	20,000
RESPECT OMAHA, NE 68114	N/A	PUBLIC	SUPPORT EDUCATIONAL EFFORTS FOR SAFER RELATIONSHIPS	10,000
SALVATION ARMY OMAHA, NE 68131	N/A	PUBLIC	ASSISTANCE TO INDIGENT FAMILIES	500
TABLE GRACE MINISTRIES OMAHA, NE 68107	N/A	PUBLIC	ASSISTANCE TO INDIGENT FAMILIES	250
TELLURIDE FILM FESTIVAL BERKELEY, CA 94710	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	12,500
THEATRE ASPEN ASPEN, CO 81611	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	1,000
UNITED STATES ARTISTS LOS ANGELES, CA 90036	N/A	PUBLIC	PROVIDE SUPPORT FOR ARTISTS	50,000
UNITED WAY OF THE MIDLANDS OMAHA, NE 68154	N/A	PUBLIC	SUPPORT COMMUNITY RELIEF EFFORTS	25,000
USA FOR UNHCR WASHINGTON, DC 20006	N/A	PUBLIC	PROVIDE SUPPORT FOR EMERGENCY ASSISTANCE IN DARFUR	5,000
UTA HALEE GIRLS VILLAGE OMAHA, NE 68112	N/A	PUBLIC	SUPPORT FOR DISADVANTAGED YOUNG WOMEN	25,000
VIRGIN UNITE USA NEW YORK, NY 10013	N/A	PUBLIC	SUPPORT SOLUTIONS TO SOCIAL AND ENVIRONMENTAL PROBLEMS	13,000
WHITNEY MUSEUM OF AMERICAN ART NEW YORK, NY 10021	N/A	PUBLIC	SUPPORT ART EXHIBITIONS	500
WESTSIDE FOUNDATION / VMPA HALL OF FAME OMAHA, NE 68124	N/A	PUBLIC	SUPPORT SCHOOL MUSIC PROGRAM	1,000

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RECIPIENT NAME AND ADDRESS	IF INDIVIDUAL, RELATIONSHIP TO MANAGER	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
WESTSIDE FOUNDATION / WHS DRAMA OMAHA, NE 68124	N/A	PUBLIC	SUPPORT SCHOOL THEATRE PROGRAM	1,000
YOUTH FRONTIERS INC MINNEAPOLIS, MN 55416	N/A	PUBLIC	SUPPORT PROGRAM TO CHANGE THE WAY YOUNG PEOPLE TREAT EACH OTHER	5,000
YWCA OMAHA OMAHA, NE 68144	N/A	PUBLIC	ASSIST WOMEN REENTRYING THE WORK FORCE	500
			TOTAL GRANTS AND CONTRIBUTIONS	415,530