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Return of Private Foundation

OMB No 1545-0052

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

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

, and ending

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name change

Name of foundation THE INSTITUTE FOR TECHNOLOGY IN HEALTH CARE		A Employer identification number 52-1292049
Number and street (or P O box number if mail is not delivered to street address) 1759 Q STREET, NW	Room/suite	B Telephone number 202-667-5041
City or town, state, and ZIP code WASHINGTON, DC 20009-2407		C If exemption application is pending, check here <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1 Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 2,043,860. (Part I, column (d) must be on cash basis.)	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
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).)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received			N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	16.	16.		STATEMENT 1
4 Dividends and interest from securities	40,192.	40,192.		STATEMENT 2
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	-124,625.			
b Gross sales price for all assets on line 6a	552,844.			
7 Capital gain net income (from Part IV, line 2)		0.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss)				
11 Other income				
12 Total. Add lines 1 through 11	-84,417.	40,208.		
13 Compensation of officers, directors, trustees, etc	0.	0.		0.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees				
b Accounting fees	3,516.	0.		0.
c Other professional fees				
17 Interest				
18 Taxes	478.	478.		0.
19 Depreciation and depletion				
20 Occupancy				
21 Travel, conferences, and meetings	997.	0.		997.
22 Printing and publications				
23 Other expenses	1,287.	0.		815.
24 Total operating and administrative expenses. Add lines 13 through 23	6,278.	478.		1,812.
25 Contributions, gifts, grants paid	88,700.			88,700.
26 Total expenses and disbursements. Add lines 24 and 25	94,978.	478.		90,512.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-179,395.			
b Net investment income (if negative, enter -0-)		39,730.		
c Adjusted net income (if negative, enter -0-)			N/A	

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Part II Balance Sheets <small>Attached schedules and amounts in the description column should be for end-of-year amounts only</small>		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	1,169.		
	2 Savings and temporary cash investments	271,149.	11,790.	11,783.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	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			
	b Investments - corporate stock STMT 6	1,801,694.	1,882,791.	2,032,077.
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	2,074,012.	1,894,581.	2,043,860.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)	36.	0.	
	23 Total liabilities (add lines 17 through 22)	36.	0.	
Foundations that follow SFAS 117, check here <input type="checkbox"/>	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	2,034,096.	2,034,096.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	39,880.	-139,515.	
	30 Total net assets or fund balances	2,073,976.	1,894,581.	
	31 Total liabilities and net assets/fund balances	2,074,012.	1,894,581.	

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	2,073,976.
2 Enter amount from Part I, line 27a	2	-179,395.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,894,581.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,894,581.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a VARIOUS PUBLICLY-TRADED SECURITIES		P	06/30/09	05/25/10
b VARIOUS PUBLICLY-TRADED SECURITIES		P	VARIOUS	VARIOUS
c CAPITAL GAINS DIVIDENDS				
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 36,401.		42,870.	-6,469.
b 514,859.		634,599.	-119,740.
c 1,584.			1,584.
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			-6,469.
b			-119,740.
c			1,584.
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	-124,625.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2009	42,725.	1,612,754.	.026492
2008	4,552.	1,895,364.	.002402
2007	114,207.	2,228,574.	.051247
2006	107,200.	2,149,335.	.049876
2005	1,542.	427,806.	.003604

2 Total of line 1, column (d)	2	.133621
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	.026724
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	1,901,595.
5 Multiply line 4 by line 3	5	50,818.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	397.
7 Add lines 5 and 6	7	51,215.
8 Enter qualifying distributions from Part XII, line 4	8	90,512.

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.

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	397.
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	397.
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	397.
6	Credits/Payments:		
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a	943.
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	943.
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	546.
11	Enter the amount of line 10 to be: Credited to 2011 estimated tax <input checked="" type="checkbox"/> 546. Refunded <input type="checkbox"/>	11	0.

Part VII-A Statements Regarding Activities

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

N/A

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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	<input type="checkbox"/>	<input checked="" type="checkbox"/>
12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12	<input type="checkbox"/>	<input checked="" type="checkbox"/>
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>WWW.TECHNOLOGYHEALTHCARE.ORG</u>	13	<input checked="" type="checkbox"/>	<input type="checkbox"/>
14 The books are in care of ► <u>THE FOUNDATION</u> Telephone no. ► <u>202-667-5041</u> Located at ► <u>1759 Q STREET, NW, WASHINGTON, DC</u> ZIP+4 ► <u>20009-2407</u>			
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16 At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes <input type="checkbox"/>	No <input checked="" type="checkbox"/>

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

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

		Yes	No
1a During the year did the foundation (either directly or indirectly):			
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A ► <input type="checkbox"/>	1b	
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	<input checked="" type="checkbox"/>
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 ► _____ , _____ , _____	<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 instructions.)	N/A	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____ , _____ , _____			
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2010 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010.</i>)	N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	<input checked="" type="checkbox"/>
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	<input checked="" type="checkbox"/>

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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)?

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

If "Yes" to 6b, file Form 8870

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

☐ Yes ☒ No

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

N/A

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
STANLEY J. KULICZKOWSKI 3001 VEAZEY TERRACE, #512 WASHINGTON, DC 20008	DIRECTOR, SECRETARY, TREAS	2.00	0.	0.
CESAR A. CACERES 2500 VIRGINIA AVE., N.W., #714-S WASHINGTON, DC 20037	DIRECTOR, PRESIDENT, VICE-	2.00	0.	0.

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

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

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

0

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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	1,650,656.
b	Average of monthly cash balances	1b	279,897.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,930,553.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,930,553.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	28,958.
5	Net value of noncharitable-use assets . Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,901,595.
6	Minimum investment return . Enter 5% of line 5	6	95,080.

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	95,080.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	397.
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	397.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	94,683.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	94,683.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	94,683.

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	90,512.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions . Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	90,512.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	397.
6	Adjusted qualifying distributions . Subtract line 5 from line 4	6	90,115.

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				94,683.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005				
b From 2006				
c From 2007				
d From 2008				
e From 2009				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2010 from Part XII, line 4: ► \$ 90,512.				
a Applied to 2009, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2010 distributable amount				90,512.
e Remaining amount distributed out of corpus	0.			
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	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				4,171.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2006				
b Excess from 2007				
c Excess from 2008				
d Excess from 2009				
e Excess from 2010				

▶

☐ 4942(I)(3) or ☐ 4942(I)(5)

- 3 Subtract line 20 from line 20.
 - 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 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(j)(3)(B)(iii)
 - (3) Largest amount of support from an exempt organization
 - (4) Gross investment income

Form **990-PF** (2010)

**THE INSTITUTE FOR TECHNOLOGY IN
HEALTH CARE**

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
<p><i>a Paid during the year</i></p> <p>AMERICAN ACADEMY OF HIV MEDICINE 1705 DE SALES STREET, N.W., #3700 WASHINGTON,</p>	N/A	PUBLIC CHARITY	SUPPORT - MEDICAL TECHNOLOGY IN HIV PRACTICE	41,700.
<p>ESCUELA AGRICOLA PAN-AMERICANA, INC. (ZAMORANO UNIVERSITY) - 1701 PENNSYLVANIA AVE.,</p>	N/A	PUBLIC CHARITY	FUND A STUDY COMPARING CALORIC INTAKE, HEART DISEASE AND DIABETES MELLITUS	47,000.
Total				88,700.
<p><i>b Approved for future payment</i></p> <p>NONE</p>				
Total				0.

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

13

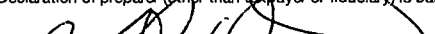
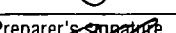
Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		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		X
	(2) Other assets		X
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization		X
	(2) Purchases of assets from a noncharitable exempt organization		X
	(3) Rental of facilities, equipment, or other assets		X
	(4) Reimbursement arrangements		X
	(5) Loans or loan guarantees		X
	(6) Performance of services or membership or fundraising solicitations		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees		X
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
N/A		

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		3-3-2011 Date		EXECUTIVE DIRECTOR Title		
Paid Preparer Use Only	Print/Type preparer's name ERIC COHEN, CPA		Preparer's signature 		Date 2/28/11	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name ▶ E. COHEN AND COMPANY, CPAS					Firm's EIN ▶	
Firm's address ▶ ONE RESEARCH COURT, SUITE 101 ROCKVILLE, MD 20850					Phone no. 301-917-6200		

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Jump To Section:
Application Guide



Clinical Engineering
The ITHC has long supported those working in the field of Clinical Engineering through professional recognition and creative student endeavors. [More...](#)



HIV Health Care
ITHC first became involved in HIV patient education the early/mid-1980's through the use of, at the time, cutting edge desktop publishing systems available to produce educational materials, supported individuals with AIDS in maintaining their health insurance, and now seeks to recognize the efforts of others to use technology to educate physicians maintain currency in this dynamic field. [More...](#)



Latin America
The Institute for Technology in Health Care offers a prize to a young Medical Doctor that performs a project that shows that technology improves the delivery of health care in Latin America. [More...](#)



Awards in Honduras
The Awards in Honduras category seeks to encourage the use of technology in demonstration projects that can be adopted by others in the provision of health care services in Honduras. [More...](#)



The Mize Award
The Mize Award was established in memory of W. Raymond Mize, MD, the first president of the ITHC. This award seeks to recognize the

Application Guide for ITHC AWARDS

Please provide the following information in submitting a proposal for consideration by the Institute for Technology in Health Care:

A. Contact Information

- Name of the applicant organization
- Name and title of the principal contact person
- Street address
- City, State, Zip
- Country
- Phone number
- Fax number, if available
- E-mail address

B. Project Information

Indicate which ITHC Award is best suited for your project:

- W. Raymond Mize, Jr., MD, Technology in Clinical Care Awards
- Projects to Improve Health Care in Honduras
- Projects in Latin America
- Clinical Engineering Projects
- HIV Health Care
- Describe in two or less pages project goals, organization, and timing or educational levels of performer(s).
- How the project, paper, presentation or other proposal will stimulate others and meet goals of the Institute for technology in Health Care?
- How the applicant organization will announce the award?
- How, where and when will the applicant organization present the award?
- What is the minimal amount of funding required for your project? Please detail how the funds will be spent.
- If a USA organization, IRS status is necessary.
- If not a USA organization, accreditation of applicant organization or credentials must be included.
- Tax-exempt status
- For applicant organizations outside the United States, submit accreditation or credentials with your submission.
- Are there other organizations cosponsoring the same identical or closely related work?

C. Permission Statement

Permission must be given to the ITHC to reprint results or publish them or an extensive summarization in its website pages.

D. Submissions

Please fax or mail your submission to The Institute for Technology in Health Care. You may also use our [contact page](#).

Prohibition: In accordance with Internal Revenue Service regulations, ITHC cannot consider proposals that include lobbying activities or attempts in any way to influence legislation at any level. Nor can we consider proposals on behalf of foreign government entities.

Submit your proposal to:

Jacqueline W. Schick
Board Secretary

for imaging to promote better health
care. [More...](#)

Institute for Technology in Health Care
1759 Que Street, N.W.
Washington , DC 20009-2407
U.S.A.

Telephone: 202-360-4886
Fax: 202-338-0089
E-mail: info@ithcawards.org

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THE INSTITUTE FOR TECHNOLOGY IN HEALTHCARE

DECEMBER 1 - DECEMBER 31, 2010
ACCOUNT NUMBER: 6713-1424

Additional information

Gross proceeds	THIS PERIOD 327,766.99	THIS YEAR 551,260.18	Foreign withholding	THIS PERIOD -39.96	THIS YEAR -265.73
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Portfolio detail

Cash and Sweep Balances

Bank Deposit Sweep - Consists of monies held in one or more FDIC-insured depository account(s) established with Wells Fargo Bank, N.A. Additional funds over \$250,000 are deposited at one or more additional banks affiliated with Wells Fargo Advisors. These assets are not covered by SIPC, but are instead covered by FDIC insurance in accordance with FDIC rules. For additional information on the Bank Deposit Sweep for your account please contact Your Financial Advisor

DESCRIPTION	% OF ACCOUNT	ANNUAL PERCENTAGE YIELD EARNED*	CURRENT MARKET VALUE	ESTIMATED ANNUAL INCOME
Cash	0.08	N/A	1,612.25	N/A
BANK DEPOSIT SWEEP	12.35	0.02	262,033.82	52.40
Interest Period 12/01/10 - 12/31/10				
Total Cash and Sweep Balances	12.43		\$263,646.07	\$52.40

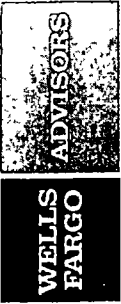
* APY measures the total amount of the interest paid on an account based on the interest rate and the frequency of the compounding during the interest period. The annual percentage yield is expressed as an annualized rate, based on a 365- or 366-day year (as applicable).

Stocks, options & ETFs

Stocks and ETFs

DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED ANNUAL INCOME	ANNUAL YIELD (%)
ARROW ELECTRONICS INC ARW	0.48	300	31.87	9,561.00	34.2500	10,275.00	714.00	N/A	N/A
Acquired 10/04/05 L									
AT & T INC T	2.22	1,600	26.15	42,483.28	29.3800	47,008.00	4,524.72	2,752.00	5.85
Acquired 04/19/10 S									
CIGNA CORPORATION CI		1,500	39.76	59,650.00		54,989.99	-4,660.01		
Acquired 10/04/05 L						256.84	16.47		
Reinvestments L		7,00600	34.30	240.37					
Total	2.60	1,507.00600		\$59,890.37	36.6600	\$55,246.83	-\$4,643.54	\$60.28	0.11





THE INSTITUTE FOR TECHNOLOGY
IN HEALTHCARE

DECEMBER 1 - DECEMBER 31, 2010
ACCOUNT NUMBER: 6713-1424

Stocks, options & ETFs

Stocks and ETFs continued

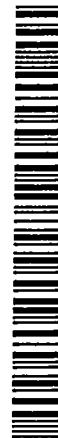
DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
								ANNUAL INCOME	ANNUAL YIELD (%)
CONSOLIDATED EDISON INC									
CD Acquired 12/16/10 S	2.34	1,000	49.07	49,717.82	49.5700	49,570.00	-147.82	2,380.00	4.80
DOMINION RES INC VA NEW									
D Acquired 12/16/10 S	2.01	1,000	42.08	42,685.48	42.7200	42,720.00	34.52	1,830.00	4.28
DUKE ENERGY CORP									
DUK Acquired 12/16/10 S	2.18	2,600	17.58	46,438.83	17.8100	46,306.00	-132.83	2,548.00	5.50
EDISON INTL									
EIX Acquired 12/16/10 S	2.25	1,235	38.14	47,754.81	38.6000	47,671.00	-83.81	1,580.80	3.31
FIBRIA CELULOSE S A									
SPONSORED ADR REPSTG COM SHARES									
FBR Acquired 11/27/09 L	0.42	561	15.15	8,501.95	16.0000	8,976.00	474.05	N/A	N/A
FREEMPORT-MCMORAN COPPER									
& GOLD INC CLASS B									
FCX Acquired 01/24/08 L		500	82.19	41,373.84		60,045.00	18,671.16		
Reinvestments L		12.92600	53.41	690.49		1,552.28	861.79		
Total	2.90	512.92600		\$42,064.33	120.0900	\$61,597.28	\$19,532.95	\$1,025.85	1.67
GENERAL ELECTRIC COMPANY									
GE Acquired 10/04/05 L		300	32.85	9,855.00		5,487.00	-4,368.00		
Acquired 10/04/05 L		300	32.85	9,855.00		5,487.00	-4,368.00		
Reinvestments L		120.18100	30.11	3,619.34		2,198.11	-1,421.23		
Total	0.62	720.18100		\$23,329.34	18.2900	\$13,172.11	-\$10,157.23	\$403.30	3.06
ITT EDUCATIONAL SERVICES									
INC ESI									
Acquired 10/04/05 L	1.50	500	49.14	24,570.00	63.6900	31,845.00	7,275.00	N/A	N/A
JOHNSON & JOHNSON									
JNJ Acquired 10/04/05 L		500	63.05	31,525.00		30,924.99	-600.01		

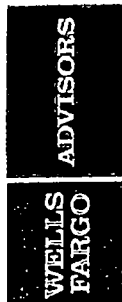
THE INSTITUTE FOR TECHNOLOGY
IN HEALTHCARE

DECEMBER 1 - DECEMBER 31, 2010
ACCOUNT NUMBER: 6713-1424

Stocks, options & ETFs
Stocks and ETFs continued

DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
								ANNUAL INCOME	ANNUAL YIELD (%)
Investments L		47,98300	61.51	2,951.78		2,967.75	15.97		
Total	1.60	547.98300		\$34,476.78	61.8500	\$33,892.74	-\$584.04	\$1,183.64	3.49
MARATHON OIL CORP									
MRO									
Acquired 01/18/08 L		500	48.34	24,389.60		18,515.00	-5,874.60		
Reinvestments L		18,00500	33.68	606.51		666.72	60.21		
Total	0.90	518.00500		\$24,996.11	37.0300	\$19,181.72	-\$5,814.39	\$518.00	2.70
METLIFE INC									
MET									
Acquired 10/04/05 L		500	49.16	24,580.00		22,220.00	-2,360.00		
Reinvestments L		28,80000	45.75	1,317.70		1,279.87	-37.83		
Total	1.11	528.80000		\$25,897.70	44.4400	\$23,499.87	-\$2,397.83	\$391.31	1.67
NOBLE ENERGY INC									
NBL									
Acquired 10/04/05 L		1,000	46.10	46,100.00		86,079.99	39,979.99		
Reinvestments L		27,81000	58.29	1,621.12		2,393.89	772.77		
Total	4.17	1,027.81000		\$47,721.12	86.0800	\$88,473.88	\$40,752.76	\$740.02	0.84
OCCIDENTAL PETE CORP									
OXY									
Acquired 10/04/05 L		1,000	40.71	40,710.00		98,099.99	57,389.99		
Acquired 01/18/08 L		500	69.99	35,254.04		49,050.00	13,795.96		
Acquired 01/24/08 L		500	65.32	32,909.31		49,050.01	16,140.70		
Reinvestments L		87,37000	58.42	5,104.59		8,570.99	3,466.40		
Reinvestments S		0.04700	80.85	3.80		4.61	0.81		
Total	9.65	2,087.41700		\$113,981.74	98.1000	\$204,775.60	\$90,793.86	\$3,172.87	1.55
P P G INDUSTRIES INC									
PPG									
Acquired 10/04/05 L		500	57.39	28,695.00		42,034.99	13,339.99		
Reinvestments L		63,86400	58.01	3,705.09		5,369.05	1,663.96		
Total	2.23	563.86400		\$32,400.09	84.0700	\$47,404.04	\$15,003.95	\$1,240.50	2.62
PEPCO HOLDINGS INC									
POM									
Acquired 12/16/10 S	2.15	2,500	18.26	46,369.87	18.2500	45,625.00	-744.87	2,700.00	5.91





THE INSTITUTE FOR TECHNOLOGY
IN HEALTHCARE

DECEMBER 1 - DECEMBER 31, 2010
ACCOUNT NUMBER: 6713-1424

Stocks, options & ETFs

Stocks and ETFs continued

DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
								ANNUAL INCOME	ANNUAL YIELD (%)
ROYAL DUTCH SHELL PLC									
RCL A									
..JS/A									
Acquired 04/19/10 S		675	60.70	41,541.70		45,076.50	3,534.80		
Acquired 05/25/10 S		900	50.13	45,614.46		60,102.00	14,487.54		
Acquired 12/16/10 S		500	64.66	32,834.50		33,390.00	555.50		
Total	6.53	2,075		\$119,990.66	66.7800	\$138,568.50	\$18,577.84	\$5,926.20	4.28
SCANA CORP COM									
SCG									
Acquired 04/19/10 S	2.07	1,080	38.61	42,307.33	40.6000	43,848.00	1,540.67	2,052.00	4.67
THE SOUTHERN COMPANY									
SO									
Acquired 04/14/10 S	2.79	1,550	33.77	52,840.85	38.2300	59,256.50	6,415.65	2,821.00	4.76
TRAVELERS COS INC/ THE									
TRV									
Acquired 10/04/05 L		500	43.63	21,815.00		27,854.99	6,039.99		
Reinvestments L		43.23800	46.35	2,004.42		2,408.79	404.37		
Total	1.43	543.23800		\$23,819.42	55.7100	\$30,263.78	\$6,444.36	\$782.26	2.58
UNITEDHEALTH GROUP									
INC									
UNH									
Acquired 10/04/05 L		600	57.06	34,236.00		21,665.99	-12,570.01		
Reinvestments L		1 16500	46.37	54.03		42.07	-11.96		
Total	1.02	601.16500		\$34,290.03	36.1100	\$21,708.06	-\$12,581.97	\$300.58	1.38
VERIZON COMMUNICATIONS									
COM									
VZ									
Acquired 12/16/10 S	2.11	1,250	34.58	43,852.28	35.7800	44,725.00	872.72	2,437.50	5.44
WESTERN GAS PARTNERS LP									
WES									
Acquired 12/16/10 S	2.28	1,600	29.65	48,107.53	30.3000	48,480.00	372.47	2,368.00	4.88
Total Stocks and ETFs	59.58			\$1,088,048.72		\$1,264,089.91	\$176,041.19	\$39,214.11	3.10
Total Stocks, options & ETFs	59.58			\$1,088,048.72		\$1,264,089.91	\$176,041.19	\$39,214.11	3.10

THE INSTITUTE FOR TECHNOLOGY
IN HEALTHCARE

DECEMBER 1 - DECEMBER 31, 2010
ACCOUNT NUMBER: 6713-1424

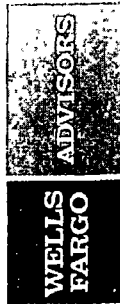
Mutual Funds

Mutual fund shares are priced at net asset value. Estimated Annual Income and Yield refer to Dividends and Interest Income only, and typically do not reflect Total return. If a portion of your fund position was converted, the 'Client Investment' value may include reinvestments from previously held positions.

Open End Mutual Funds

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
							ANNUAL INCOME	ANNUAL YIELD (%)
CALAMOS INVT TR NEW GROWTH AND INCOME FD CLASS A CVTRX								
Acquired 10/04/05 L	643.23300	31.23	20,088.16		20,203.94	115.78		
Acquired 10/04/05 L	4.47600	31.23	139.78		140.59	0.81		
Acquired 10/04/05 L	1.35700	31.23	42.37		42.62	0.25		
Acquired 10/04/05 L	3.45200	31.23	107.80		108.43	0.63		
Acquired 10/04/05 L	3.59600	31.23	112.30		112.95	0.65		
Acquired 10/04/05 L	1.77700	31.23	55.49		55.82	0.33		
Acquired 10/04/05 L	1.55500	31.23	48.56		48.84	0.28		
Acquired 10/04/05 L	1.86600	31.23	58.27		58.61	0.34		
Acquired 10/04/05 L	1.19300	31.23	37.25		37.47	0.22		
Acquired 10/04/05 L	2.39900	31.23	74.92		75.35	0.43		
Acquired 10/04/05 L	3.74900	31.23	117.08		117.76	0.68		
Acquired 10/04/05 L	487.90500	30.46	14,865.54		15,325.10	459.56		
Acquired 10/04/05 L	2,577.58600	30.46	78,534.68		80,961.95	2,427.27		
Acquired 10/04/05 L	8.60700	30.46	262.25		270.35	8.10		
Acquired 10/04/05 L	561.94000	30.40	17,085.61		17,650.54	564.93		
Acquired 10/04/05 L	13.29000	30.40	404.10		417.44	13.34		
Acquired 10/04/05 L	14.43600	30.40	438.94		453.44	14.50		
Acquired 10/04/05 L	0.69000	30.40	20.99		21.67	0.68		
Acquired 10/04/05 L	6.45000	30.40	196.13		202.59	6.46		
Acquired 10/04/05 L	2.83800	30.40	86.29		89.14	2.85		
Acquired 10/04/05 L	15.75600	30.40	479.06		494.90	15.84		
Acquired 10/04/05 L	1.17700	30.40	35.80		36.97	1.17		
Acquired 10/04/05 L	11.05400	30.40	336.11		347.21	11.10		
Acquired 10/04/05 L	10.64100	30.40	323.54		334.23	10.69		
Acquired 10/04/05 L	2.99000	30.40	90.91		93.92	3.01		
Acquired 10/04/05 L	1.17200	30.40	35.63		36.81	1.18		
Acquired 10/04/05 L	2.65700	30.40	80.80		83.46	2.66		
Acquired 10/04/05 L	6.13200	30.40	186.46		192.61	6.15		
Acquired 10/04/05 L	12.33500	30.40	375.06		387.44	12.38		
Acquired 10/04/05 L	11.72800	30.40	356.59		368.38	11.79		
Reinvestments L	695.70200	31.13	21,663.13		21,852.01	188.88		





THE INSTITUTE FOR TECHNOLOGY
IN HEALTHCARE

DECEMBER 1 - DECEMBER 31, 2010
ACCOUNT NUMBER: 6713-1424

Mutual Funds

Open End Mutual Funds continued

DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
								ANNUAL INCOME	ANNUAL YIELD (%)
Total	7.57	5,113.73900		\$156,739.60	31.4100	\$160,622.54	\$3,882.94	\$3,589.84	2.23
Client Investment (Excluding Reinvestments)									
Gain/Loss on Client Investment (Including Reinvestments)						\$135,076.47			
						\$25,546.07			
CAPITAL INCOME BLDR									
CLA									
CAIBX									
Acquired 10/07/05 L		448.10900	55.79	25,006.00		22,365.11	-2,640.89		
Reinvestments L		38.03200	58.90	2,240.46		1,898.18	-342.28		
Total	1.14	486.14100		\$27,246.46	49.9100	\$24,263.29	-\$2,983.17	\$862.90	3.56
Client Investment (Excluding Reinvestments)									
Gain/Loss on Client Investment (Including Reinvestments)						\$25,006.00			
						-\$742.71			
FBR FDS									
BALANCED FD INV CL									
AFSAX									
Acquired 10/04/05 L		1,876.65497	12.97	24,340.22		22,820.11	-1,520.11		
Reinvestments L		453.53603	12.90	5,852.16		5,515.01	-337.15		
Total	1.34	2,330.19100		\$30,192.38	12.1600	\$28,335.12	-\$1,857.26	\$731.67	2.58
Client Investment (Excluding Reinvestments)									
Gain/Loss on Client Investment (Including Reinvestments)						\$24,340.22			
						\$3,994.90			
RANKLIN INCOME FUND									
CLASS A									
FKINX									
Acquired 03/19/07 L		26,978.41700	2.78	75,007.49		58,812.68	-16,194.81		
Reinvestments L		5,051.61000	2.20	11,144.71		11,012.77	-131.94		
Total	3.29	32,030.02700		\$86,152.20	2.1800	\$69,825.45	-\$16,326.75	\$4,612.32	6.61
Client Investment (Excluding Reinvestments)									
Gain/Loss on Client Investment (Including Reinvestments)						\$75,007.49			
						-\$5,182.04			
GOLDMAN SACHS TR									
GROWTH STRAT PORT A									
GGSA									
Acquired 10/04/05 L		1,596.16900	12.68	20,239.41		17,158.80	-3,080.61		
Reinvestments L		221.22800	10.87	2,405.47		2,378.21	-27.26		

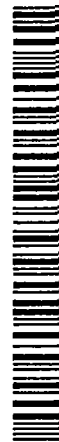
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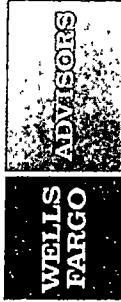
DECEMBER 1 - DECEMBER 31, 2010
ACCOUNT NUMBER: 6713-1424

Mutual Funds

Open End Mutual Funds continued

DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
								ANNUAL INCOME	ANNUAL YIELD (%)
Total	0.92	1,817.39700		\$22,644.88	10.7500	\$19,537.01	-\$3,107.87	\$454.34	2.33
Client Investment (Excluding Reinvestments)									
Gain/Loss on Client Investment (Including Reinvestments)									
HENDERSON INTL OPPTY S									
CLA									
HFOAX									
Acquired 10/06/05 L		2,518.89200	19.85	50,006.00		53,123.41	3,117.41		
Reinvestments L		476.90000	23.59	11,250.16		10,057.84	-1,192.32		
Total	2.98	2,995.79200		\$61,256.16	21.0900	\$63,181.25	\$1,925.09	\$407.42	0.64
Client Investment (Excluding Reinvestments)									
Gain/Loss on Client Investment (Including Reinvestments)									
DAVIS NEW YORK VENTURE									
FUND CLA									
NYVTX									
Acquired 11/22/05 L		698.71400	35.78	25,006.00		23,993.83	-1,012.17		
Reinvestments L		5.56500	33.89	188.65		191.11	2.46		
Total	1.14	704.27900		\$25,194.65	34.3400	\$24,184.94	-\$1,009.71	\$264.10	1.09
Client Investment (Excluding Reinvestments)									
Gain/Loss on Client Investment (Including Reinvestments)									
OPPENHEIMER GLOBAL									
OPPORTUNITIES FD CLA									
OPGIX									
Acquired 10/10/05 L		1,391.59500	35.93	50,006.00		41,372.11	-8,633.89		
Reinvestments L		616.58000	23.49	14,487.51		18,330.93	3,843.42		
Total	2.81	2,008.17500		\$64,493.51	29.7300	\$59,703.04	-\$4,790.47	\$566.30	0.95
Client Investment (Excluding Reinvestments)									
Gain/Loss on Client Investment (Including Reinvestments)									
OPPENHEIMER INTL BOND									
FUND CLA									
OIBAX									
Acquired 03/19/07 L		5,477.30800	6.39	35,007.50		35,931.09	923.59		
Reinvestments L		801.63700	6.20	4,974.51		5,258.78	284.27		





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Mutual Funds

Open End Mutual Funds continued

DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
								ANNUAL INCOME	ANNUAL YIELD (%)
Total	1.94	6,278.94500		\$39,982.01	6.5600	\$41,189.87	\$1,207.86	\$1,695.31	4.12
Client Investment (Excluding Reinvestments)									
Gain/Loss on Client Investment (Including Reinvestments)									
PIONEER GLOBAL HIGH YIELD CL A						\$35,007.50			
PGHYX						\$6,182.37			
Acquired 01/24/08 L	2.10	4,222.97300	11.84	50,007.50	10.5500	44,552.36	-5,455.14	3,239.02	7.27
PIONEER HIGH YIELD FD CL A									
TAHYX									
Acquired 10/04/05 L		64.27500	11.42	734.01		653.03	-80.98		
Acquired 10/04/05 L		11.92100	11.42	136.13		121.12	-15.01		
Acquired 10/04/05 L		0.37400	11.42	4.27		3.80	-0.47		
Acquired 10/04/05 L		0.06400	11.42	0.73		0.65	-0.08		
Acquired 10/04/05 L		0.40200	11.42	4.59		4.08	-0.51		
Acquired 10/04/05 L		0.38700	11.42	4.41		3.93	-0.48		
Acquired 10/04/05 L		0.39200	11.42	4.27		3.98	-0.49		
Acquired 10/04/05 L		0.36900	11.42	4.21		3.75	-0.46		
Acquired 10/04/05 L		0.40500	11.42	4.62		4.11	-0.51		
Acquired 10/04/05 L		0.43500	11.42	4.96		4.42	-0.54		
Acquired 10/04/05 L		0.45900	11.42	5.24		4.66	-0.58		
Acquired 10/04/05 L		0.45600	11.42	5.20		4.63	-0.57		
Acquired 10/04/05 L		0.46500	11.42	5.31		4.72	-0.59		
Acquired 10/04/05 L		0.46500	11.42	5.31		4.72	-0.59		
Acquired 10/04/05 L		0.37500	11.42	4.31		4.72	-0.59		
Acquired 10/04/05 L		0.36500	11.42	4.28		3.84	-0.47		
Acquired 10/04/05 L		0.38700	11.42	4.16		3.71	-0.45		
Acquired 10/04/05 L		0.37400	11.42	4.41		3.93	-0.48		
Acquired 10/04/05 L		0.37800	11.42	4.27		3.80	-0.47		
Acquired 10/04/05 L		0.37000	11.42	4.31		3.84	-0.47		
Acquired 10/04/05 L		0.35900	11.42	4.22		3.76	-0.46		
Acquired 10/04/05 L		0.37200	11.42	4.09		3.65	-0.44		
Acquired 10/04/05 L		0.46000	11.42	4.24		3.78	-0.46		
Acquired 10/04/05 L		0.41700	11.42	5.25		4.67	-0.58		
Acquired 10/04/05 L		2.50400	11.42	4.76		4.24	-0.52		
Acquired 10/04/05 L		0.41300	11.42	28.59		25.44	-3.15		
Acquired 10/04/05 L		0.00100	11.42	4.71		4.20	-0.51		
Acquired 10/04/05 L		0.39700	11.42	0.01		0.01	0.00		
Acquired 10/04/05 L			11.42	4.53		4.03	-0.50		

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DECEMBER 1 - DECEMBER 31, 2010
ACCOUNT NUMBER: 6713-1424

Mutual Funds

Open End Mutual Funds continued

DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
								ANNUAL INCOME	ANNUAL YIELD (%)
Acquired 10/05/05 L Reinvestments L		0.36700 17.88000	11.34 10.27	4.15 183.75		3.73 181.68	-0.42 -2.07		
Total	0.05	106.66600		\$1,197.50	10.1600	\$1,083.72	-\$113.78	\$50.45	4.66
Client Investment (Excluding Reinvestments) Gain/Loss on Client Investment (Including Reinvestments)									
Total Open End Mutual Funds	25.28			\$565,106.85		\$536,478.59	-\$28,628.26	\$16,473.67	3.07
Total Mutual Funds	25.28			\$565,106.85		\$536,478.59	-\$28,628.26	\$16,473.67	3.07

Preferreds/Fixed Rate Cap Securities

DESCRIPTION	% OF ACCOUNT	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
								ANNUAL INCOME	ANNUAL YIELD (%)
BARCLAY BANK PLC 7.75% NON CUM PERPETUAL PFD CALL STARTING 3/15/2013 BCS'C		1,000 49.17600	26.21 9.84	26,217.50 484.38		25,419.99 1,250.06	-797.51 765.68		
Total	1.26	1,049.17600		\$26,701.88	25.4200	\$26,670.05	-\$31.83	\$2,033.30	7.62
WELLS FARGO & CO 8% PFD CALLABLE 12/15/17 SERIES J WFC'J		999.97106 138.67394	26.46 18.66	26,466.73 2,588.39		27,189.20 3,770.55	722.47 1,182.16		
Total	1.46	1,138.84500		\$29,055.12	27.1900	\$30,959.75	\$1,904.63	\$2,277.29	7.36
Total Preferreds/Fixed Rate Cap Securities	2.72			\$55,757.00		\$57,629.80	\$1,872.80	\$4,310.59	7.48



FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
PNC BANK	16.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	16.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
WACHOVIA SECURITIES	41,776.	1,584.	40,192.
TOTAL TO FM 990-PF, PART I, LN 4	41,776.	1,584.	40,192.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PROFESSIONAL FEES	3,516.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	3,516.	0.		0.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX	478.	478.		0.
TO FORM 990-PF, PG 1, LN 18	478.	478.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK CHARGES	29.	0.		0.
DUES AND SUBSCRIPTIONS	100.	0.		0.
MEALS & ENTERTAINMENT	669.	0.		669.
MISCELLANEOUS	268.	0.		0.
PUBLIC NOTICES & LICENSES	75.	0.		0.
WEBSITE EXPENSES	146.	0.		146.
TO FORM 990-PF, PG 1, LN 23	1,287.	0.		815.

FORM 990-PF	CORPORATE STOCK	STATEMENT	6
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
WELLS FARGO - SEE ATTACHED STATEMENT	1,882,791.	2,032,077.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,882,791.	2,032,077.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 7

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

JACQUELINE W. SCHICK
1759 Q STREET, N.W.
WASHINGTON, DC 200092407

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

202-360-4886

SEE THE ATTACHED STATEMENT - ALSO AVAILABLE AT
[HTTP://WWW.ITHCAWARDS.ORG/APP](http://WWW.ITHCAWARDS.ORG/APP)

FORM AND CONTENT OF APPLICATIONS

SEE THE ATTACHED STATEMENT - ALSO AVAILABLE AT
[HTTP://WWW.ITHCAWARDS.ORG/APP](http://WWW.ITHCAWARDS.ORG/APP)

ANY SUBMISSION DEADLINES

SEE THE ATTACHED STATEMENT - ALSO AVAILABLE AT
[HTTP://WWW.ITHCAWARDS.ORG/APP](http://WWW.ITHCAWARDS.ORG/APP)

RESTRICTIONS AND LIMITATIONS ON AWARDS

SEE THE ATTACHED STATEMENT - ALSO AVAILABLE AT
[HTTP://WWW.ITHCAWARDS.ORG/APP](http://WWW.ITHCAWARDS.ORG/APP)