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

2010

Department of the Treasury
Internal Revenue Service

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

For calendar year 2010, or tax year beginning

, and ending

G Check all that apply

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

Name of foundation GEORGE F AND ELAH P EVANS FOUNDATION TR 9300062700 / R73574007		A Employer identification number 57-6218604
Number and street (or P O box number if mail is not delivered to street address) JPMORGAN CHASE BANK, NA, PO BOX 3038		B Telephone number (414) 977-1210
City or town, state, and ZIP code MILWAUKEE, WI 53201		C If exemption application is pending, check here <input type="checkbox"/>
H Check type of organization <input type="checkbox"/> Section 501(c)(3) exempt private foundation <input checked="" 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) \$ 1,401,575. (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"/>
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), 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))		(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		27,492.	27,508.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		20,213.			
b Gross sales price for all assets on line 6a		920,996.			
7 Capital gain net income (from Part IV, line 2)			20,213.		
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		47,721.	47,737.		
13 Compensation of officers, directors, trustees, etc		16,933.	12,700.		4,233.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 3		825.	0.		825.
c Other professional fees					
17 Interest					
18 Taxes STMT 4		1,270.	314.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 5		6,000.	0.		6,000.
24 Total operating and administrative expenses. Add lines 13 through 23		25,028.	13,014.		11,058.
25 Contributions, gifts, grants paid		119,537.			119,537.
26 Total expenses and disbursements. Add lines 24 and 25		144,565.	13,014.		130,595.
27 Subtract line 26 from line 12		<96,844.>			
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)			34,723.		
c Adjusted net income (if negative, enter -0-)				N/A	

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	5,387.	1,935.	1,935.
	2 Savings and temporary cash investments	58,061.	99,940.	99,940.
	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	71,500.		
	b Investments - corporate stock STMT 7	738,435.	860,386.	979,134.
	c Investments - corporate bonds STMT 8	319,403.	312,711.	320,566.
11 Investments - land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other	178,083.			
14 Land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers)	1,370,869.	1,274,972.	1,401,575.	
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			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	1,370,869.	1,274,972.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
30 Total net assets or fund balances	1,370,869.	1,274,972.		
31 Total liabilities and net assets/fund balances	1,370,869.	1,274,972.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,370,869.
2 Enter amount from Part I, line 27a	2	<96,844.>
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 6	3	1,207.
4 Add lines 1, 2, and 3	4	1,275,232.
5 Decreases not included in line 2 (itemize) ▶ ADJUSTMENT - BASIS	5	260.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,274,972.

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 SALES OF PUBLICLY TRADED SECURITIES			
b CAPITAL GAINS DIVIDENDS			
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 920,336.		900,783.	19,553.
b 660.			660.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			19,553.
b			660.
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	20,213.
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	74,599.	1,262,414.	.059092
2008	84,449.	1,507,085.	.056035
2007	81,251.	1,758,743.	.046198
2006	74,744.	1,615,899.	.046255
2005	1,347.	1,500,438.	.000898

2 Total of line 1, column (d)	2	.208478
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	.041696
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	1,387,762.
5 Multiply line 4 by line 3	5	57,864.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	347.
7 Add lines 5 and 6	7	58,211.
8 Enter qualifying distributions from Part XII, line 4	8	130,595.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		1	347.
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			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	347.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		5	347.
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-			
6 Credits/Payments			
a 2010 estimated tax payments and 2009 overpayment credited to 2010	6a 958.	7	958.
b Exempt foreign organizations - tax withheld at source	6b	8	
c Tax paid with application for extension of time to file (Form 8868)	6c	9	
d Backup withholding erroneously withheld	6d	10	611.
7 Total credits and payments Add lines 6a through 6d		11	251.
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	360. Refunded		
11 Enter the amount of line 10 to be Credited to 2011 estimated tax			

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
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	
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) WV		
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

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	X	
14	The books are in care of JPMORGAN CHASE BANK, NA Telephone no (414) 977-1210 Located at 1114 MARKET STREET, WHEELING, WV ZIP+4 26003			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <input checked="" type="checkbox"/> 15 0.			
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 N/A	16	Yes	No X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input 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)? N/A	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010? N/A	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years N/A	2a	
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 N/A		
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	3a	
b If "Yes," did it have excess business holdings in 2010 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?	4b	X

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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.

6b

X

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

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.

(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
JPMORGAN CHASE BANK, NA P O BOX 3038 MILWAUKEE, WI 53201	TRUSTEE 2.00	16,933.	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 VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services. 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 0

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

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 instructions.	
3	
Total. Add lines 1 through 3	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	1,317,330.
b	Average of monthly cash balances	1b	91,565.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,408,895.
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	1,408,895.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	21,133.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,387,762.
6	Minimum investment return. Enter 5% of line 5	6	69,388.

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	69,388.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	347.
b	Income tax for 2010 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	347.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	69,041.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	69,041.
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	69,041.

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	130,595.
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	130,595.
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	347.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	130,248.

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				69,041.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			58,293.	
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 ▶ \$ 130,595.				
a Applied to 2009, but not more than line 2a			58,293.	
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				69,041.
e Remaining amount distributed out of corpus	3,261.			
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	3,261.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	3,261.			
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	3,261.			

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

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

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

	Tax year				(e) Total
	(a) 2010	(b) 2009	(c) 2008	(d) 2007	
2 a 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 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					

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 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 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

JPMORGAN CHASE BANK, NA, (304) 234-4126

1114 MARKET STREET, WHEELING, WV 26003

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

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Part XVI-A

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
		14	16.	
		14	27,492.	
		14		
		18	20,213.	
	0.		47,721.	0

13 47,721

(See worksheet in line 13 instructions to verify calculations)

Part XVI-B

Line No.

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

SOURCE	AMOUNT
MONEY MARKET FUNDS	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
DIVIDENDS & INTERERST EXEMPT MUNICIPAL INCOME	28,136. 16.	660. 0.	27,476. 16.
TOTAL TO FM 990-PF, PART I, LN 4	28,152.	660.	27,492.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION FEES	825.	0.		825.
TO FORM 990-PF, PG 1, LN 16B	825.	0.		825.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN DIVIDEND TAX PAID	314.	314.		0.
EST EXCISE TAX PAID 12/31/2010	640.	0.		0.
EXCISE TAX PAID 12/31/2009	316.	0.		0.
TO FORM 990-PF, PG 1, LN 18	1,270.	314.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ADMIN RECORD KEEPING	6,000.	0.		6,000.	
TO FORM 990-PF, PG 1, LN 23	6,000.	0.		6,000.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	6
DESCRIPTION		AMOUNT	
MUTUAL FUND TIMING DIFFERENCES		15.	
ADJUSTMENT - RETURN OF CAPITAL		1,192.	
TOTAL TO FORM 990-PF, PART III, LINE 3		1,207.	

FORM 990-PF	CORPORATE STOCK	STATEMENT	7
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
ABBOTT LABORATORIES - 105 SHS	5,495.	5,031.	
ALEXION PHARMACEUTICALS INC - 15 SHS	842.	1,208.	
AMAZON COM INC - 20 SHS	2,112.	3,600.	
AMERICAN EXPRESS CO - 25 SHS	1,057.	1,073.	
APACHE CORP - 48 SHS	4,584.	5,723.	
APPLE INC. - 32 SHS	6,609.	10,322.	
BB & T CORP - 45 SHS	877.	1,183.	
BAKER HUGHES INC - 45 SHS	2,319.	2,573.	
CVS CAREMARK CORPORATION - 100 SHS	2,886.	3,477.	
CAMPBELL SOUP COMPANY - 50 SHS	1,817.	1,738.	
CARDINAL HEALTH INC - 70 SHS	2,097.	2,682.	
CELGENE CORPORATION - 48 SHS	2,642.	2,839.	
CISCO SYSTEMS INC - 335 SHS	7,925.	6,777.	
CITRIX SYSTEMS INC - 17 SHS	1,168.	1,163.	
COLGATE PALMOLIVE CO - 30 SHS	2,364.	2,411.	
WALT DISNEY CO - 95 SHS	2,057.	3,563.	
DOW CHEMICAL CO - 100 SHS	2,925.	3,414.	
E I DU PONT DE NEMOURS & CO - 135 SHS	5,097.	6,734.	
E M C CORP MASS - 75 SHS	1,534.	1,718.	
FREEPORT-MCMORAN COPPER & GOLD INC CL B - 55 SHS	2,614.	6,605.	
GENERAL ELECTRIC CO - 115 SHS	1,760.	2,103.	
GENERAL MILLS INC - 50 SHS	1,475.	1,780.	

INTERNATIONAL BUSINESS MACHINES CORP - 29 SHS	3,143.	4,256.
JOHNSON CONTROLS INC - 150 SHS	3,434.	5,730.
KELLOGG CO - 20 SHS	976.	1,022.
LENNAR CORP - 25 SHS	387.	469.
LOWES COMPANIES INC - 70 SHS	1,614.	1,756.
MICROSOFT CORP - 370 SHS	9,482.	10,327.
MORGAN STANLEY - 75 SHS	1,985.	2,041.
NATIONAL-OILWELL VARCO INC - 20 SHS	1,256.	1,345.
NIKE INC B - 25 SHS	1,545.	2,136.
NORFOLK SOUTHERN CORP - 110 SHS	5,335.	6,910.
NOVELLUS SYSTEMS INC - 70 SHS	1,782.	2,262.
OCCIDENTAL PETROLEUM CORP - 65 SHS	4,952.	6,377.
ORACLE CORP - 150 SHS	3,461.	4,695.
PACCAR INC - 80 SHS	2,869.	4,587.
PARKER-HANNIFIN CORP - 9 SHS	363.	777.
PEPSICO INC - 45 SHS	2,920.	2,940.
PFIZER INC - 390 SHS	5,970.	6,829.
PROCTER & GAMBLE CO - 105 SHS	6,884.	6,755.
PUBLIC SERVICE ENTERPRISE GROUP - 40 SHS	0.	0.
QUALCOMM INC - 110 SHS	4,444.	5,444.
T ROWE PRICE INT'L FUNDS INC NEW ASIA FUND - 1109.41 SHS	20,491.	21,278.
SANDISK CORP - 25 SHS	1,092.	1,247.
SOUTHERN CO - 65 SHS	1,997.	2,485.
SPRINT NEXTEL CORP - 375 SHS	1,581.	1,586.
STAPLES INC - 140 SHS	3,011.	3,188.
STATE STREET CORP - 25 SHS	994.	1,159.
SYSCO CORP - 35 SHS	1,111.	1,029.
UNITED TECHNOLOGIES CORP - 75 SHS	4,847.	5,904.
XILINX CORP - 60 SHS	1,698.	1,739.
COGNIZANT TECHNOLOGY SOLUTIONS CORP CL A - 40 SHS	2,095.	2,932.
SEMPRA ENERGY - 0 SHS	1,310.	1,312.
CITIGROUP INC - 985 SHS	4,154.	4,659.
WELLS FARGO & CO - 165 SHS	3,622.	5,113.
BANK OF AMERICA CORP - 340 SHS	9,646.	4,536.
GOLDMAN SACHS GROUP INC - 25 SHS	2,305.	4,204.
DEVON ENERGY CORP - 45 SHS	3,053.	3,533.
EOG RESOURCES INC - 45 SHS	4,163.	4,113.
HONEYWELL INTERNATIONAL INC - 70 SHS	2,943.	3,721.
UNITEDHEALTH GROUP INC - 35 SHS	1,326.	1,264.
ISHARES S&P MIDCAP 400 INDEX FUND - 168 SHS	13,896.	15,236.
VERIZON COMMUNICATIONS INC - 135 SHS	4,563.	4,830.
COACH INC - 30 SHS	1,008.	1,659.
US BANCORP DEL - 85 SHS	2,290.	2,292.
DODGE & COX INTERNATIONAL STOCK - 340.592 SHS	10,909.	12,163.
ADVANCED AUTO PARTS INC - 30 SHS	928.	1,985.
3M CO - 20 SHS	1,727.	1,726.
YUM BRANDS INC - 80 SHS	2,982.	3,924.
COMCAST CORP CL A - 70 SHS	1,235.	1,538.
CARNIVAL CORPORATION - 50 SHS	1,840.	2,306.
ARBITRAGE FUNDS - I CL I - 2134.51 SHS	27,834.	27,300.
GOOGLE INC CL A - 4 SHS	1,202.	2,376.
WELLPOINT INC - 10 SHS	553.	569.

JPM US REAL ESTATE FD - SEL FUND 3037 - 3856.77 SHS	65,166.	60,088.
JPM 3 INDEX FD - SEL FUND 3129 1.98% - 272.198 SHS	6,775.	7,766.
JPM MARKET EXPANSION INDEX FD - SEL FUND 3708 - 3830.12 SHS	30,400.	41,212.
JPM EM MKTS 3 FD - SEL FUND 1235 - 341.391 SHS	4,192.	8,333.
JPM ASIA 3 FD - SEL FUND 1134 - 851.297 SHS	22,696.	32,247.
VANGUARD MSCI EMERGING MARKETS ETF - 1150 SHS	49,368.	55,368.
AT&T INC - 70 SHS	2,720.	2,057.
STARWOOD HOTELS & RESORTS - 25 SHS	535.	1,520.
IVY LARGE CAP GROWTH FUND - I - 3636.55 SHS	41,075.	48,330.
CME GROUP INC CLASS A COMMON STOCK - 6 SHS	1,728.	1,931.
EATON VANCE MUT FDS TR GLOBAL MACRO - I - 2689.24 SHS	27,912.	27,619.
INVESCO LTD - 50 SHS	966.	1,203.
PHILIP MORRIS INTERNATIONAL - 35 SHS	1,387.	2,049.
DEUTSCHE BK ARN SPX 7/11/11 S&P500 INDEX 25000 SHS	24,500.	25,563.
ACE LTD NEW - 30 SHS	1,391.	1,868.
EAGLE SER MID CAP STK I - 884.107 SHS	20,750.	24,790.
ARTIO INTERNATIONAL 3 II - I - 1156.1 SHS	8,740.	14,405.
TYCO INTERNATIONAL LTD - 50 SHS	1,880.	2,072.
TIME WARNER INC NEW - 221 SHS	5,679.	7,110.
COVIDIEN PLC - 35 SHS	1,275.	1,598.
THREADNEEDLE ASIA PACIFIC FUND - R5 - 3171.09 SHS	36,050.	44,871.
CS ASIA BSKT MKT PLS NOTE 02/10/2011- 15000 SH	14,805.	17,820.
MERCK AND CO INC - 155 SHS	5,241.	5,586.
JPM RESEARCH MARKET NEUTRAL FD - SEL FUND - SEL - 1569.87 SHS	24,485.	24,239.
HSBC EAFE BREN 02/17/11 (10%BUFFER- 2XLEV-7.25% CAP-14.5%MAXPYMT)- 25000 SHS	24,750.	25,205.
BARC EAFE BREN 03/24/11 (10%BUFFER-2XLEV-6.82%CAP-13.64% MAXPYMT)- 15000 SHS	14,850.	15,524.
HIGHBRIDGE DYNAMIC COMM STRG FD -SEL STRATEGY FUND - SE - 975.034 SHS	14,450.	18,886.
GS EAFE NOTE 04/25/11 (80%KO BAR -0%CPN-7%CAP)- 15000 SHS	14,816.	14,667.
BARC COMMODITY CPN 5/9/11 CAPPED MARKET PLUS NOTES LKND S&P- 15000 SHS	14,850.	16,028.
GS SPX BREN 06/10/11 (10%BUFF -2XLEV-7.96%CAP-15.92%MXPYMT)- 15000 SHS	14,850.	16,692.
NEXTERA ENERGY INC - 35 SHS	1,761.	1,820.
BARC BREN ASIA BASKET 08/05/11 10%BUFFER-2XLEV-9.91%CAP- 19.82%MAXP-15000 SH	14,850.	16,874.
DB BREN SPX 08/10/11 (10%BUFFER-2XLEV-8.2%CAP- 16.4%MAXPYMT)- 20000 SHS	19,800.	22,231.
HSBC GOLD CPN NOTE 10/21/11 5%CPN, 80% BARRIER, 17.5% MAX RET - 15000 SH	14,850.	15,233.
DB CONT BUFF EQ MID 11/23/11 75% CONTIN BARRIER - 4.5%CPN- 20%CAP- 15000 SHS	14,850.	15,889.
JUNIPER NETWORKS INC - 85 SHS	1,639.	3,138.

EXXON MOBIL CORP - 135 SHS	10,120.	9,871.
METLIFE INC - 50 SHS	1,901.	2,222.
MARVELL TECHNOLOGY GROUP LTD - 80 SHS	1,642.	1,484.
PRUDENTIAL FINANCIAL INC - 45 SHS	1,882.	2,642.
CONOCOPHILLIPS - 65 SHS	3,165.	4,427.
BIOGEN IDEC INC - 25 SHS	1,247.	1,676.
BAIDU INC SPONS ADR - 15 SHS	1,383.	1,448.
TD AMERITRADE HOLDING CORPORATION - 85 SHS	1,473.	1,614.
MASTERCARD INC - CLASS A - 10 SHS	1,828.	2,241.
GENERAL MOTORS CO - 65 SHS	2,249.	2,396.
TOTAL TO FORM 990-PF, PART II, LINE 10B	860,386.	979,134.

FORM 990-PF CORPORATE BONDS STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
GOLDMAN SACHS TRUST HIGH YIELD FUND		
INSTITUTIONAL SHS - 2018.67 SHS	14,272.	14,736.
VANGUARD FIXED INCOME SECS F INTR TRM CP PT- 1675.36 SHS	14,760.	16,620.
ISHARES BARCLAYS TIPS BOND FUND - 250 SHS	25,065.	26,880.
EATON VANCE MUT FDS TR FLT RT CL I - 4993.3 SHS	43,858.	44,740.
JPM HIGH YIELD FD - SEL FUND 3580 5.91% - 8856.09 SHS	73,690.	72,177.
JPM SHORT DURATION BOND FD - SEL FUND 3133 1.36% - 5200.87 SHS	56,684.	57,054.
DREYFUS/LAUREL FDS TR PRM EMRGN MK I - 1030.35 SHS	14,600.	14,899.
JPM STR INC OPP FD FUND 3844 2.33% - 3733.85 SHS	41,482.	44,171.
JPM INTL CURRENCY INCOME FD INCOME FUND 1.28% - 2603.5 SHS	28,300.	29,289.
TOTAL TO FORM 990-PF, PART II, LINE 10C	312,711.	320,566.

Application for Extension of Time To File an Exempt Organization Return

COPY

OMB No. 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print	Name of exempt organization GEORGE F AND ELAH P EVANS FOUNDATION TR 9300062700 / R73574007	Employer identification number 57-6218604
	Number, street, and room or suite no. If a P.O. box, see instructions. JPMORGAN CHASE BANK, NA; PO BOX 3038	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. MILWAUKEE, WI 53201	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

JPMORGAN CHASE BANK, NA

- The books are in the care of ► **1114 MARKET STREET - WHEELING, WV 26003**
Telephone No. ► **(414) 977-1210** FAX No. ► **(414) 977-1221**

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2011**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
► ☒ calendar year **2010** or
► ☐ tax year beginning _____, and ending _____

- 2 If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	347.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	640.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA **For Paperwork Reduction Act Notice, see Instructions.**

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

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

Type or print File by the extended due date for filing your return. See instructions.	Name of exempt organization GEORGE F AND ELAH P EVANS FOUNDATION TR	Employer identification number 57-6218604
	9300062700 / R73574007	
	Number, street, and room or suite no. If a P.O. box, see instructions. JPMORGAN CHASE BANK, NA; PO BOX 3038	
City, town or post office, state, and ZIP code. For a foreign address, see instructions. MILWAUKEE, WI 53201		

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990	01		
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

JPMORGAN CHASE BANK, NA

- The books are in the care of **1114 MARKET STREET - WHEELING, WV 26003**
Telephone No. **(414) 977-1210** FAX No. **(414) 977-1221**

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until **NOVEMBER 15, 2011.**

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

6 If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

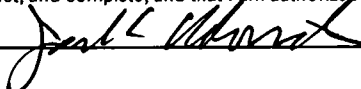
7 State in detail why you need the extension

ADDITIONAL TIME IS NEEDED TO PREPARE A COMPLETE AND ACCURATE RETURN.

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	347.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	640.
c Balance due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form

Signature  Title **CPA** Date **5/9/11**

Form 8868 (Rev. 1-2011)