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

OMB No 1545-0052

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 , 2010, and ending ,

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

Name of foundation CHAMIZA FOUNDATION		A Employer identification number 85-0373197
Number and street (or P.O. box number if mail is not delivered to street address) 1919 FIFTH STREET		B Telephone number (see the instructions) (505) 986-5044
City or town SANTA FE	State ZIP code NM 87505	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, column (c), line 16) \$ 2,876,469.	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, column (d) must be on cash basis)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <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) (see the instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
REVENUE	1 Contributions, gifts, grants, etc. received (att sch)				
	2 Ck <input checked="" type="checkbox"/> if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments	17,731.	17,731.		
	4 Dividends and interest from securities	86,866.	86,866.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		17,731.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit/(loss) (att sch)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	104,597.	122,328.			
ADMINISTRATIVE EXPENSES AND	13 Compensation of officers, directors, trustees, etc.	85,000.			85,000.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits	17,227.			17,227.
	16a Legal fees (attach schedule) L-16a Stmt	556.			556.
	b Accounting fees (attach sch) L-16b Stmt	4,204.			4,204.
	c Other prof fees (attach sch) L-16c Stmt	33,299.			33,299.
	17 Interest				
	18 Taxes (attach schedule) (see instr) 1.5 EXCISE	1,500.			
	19 Depreciation (attach sch) and depletion				
	20 Occupancy	8,857.			8,857.
	21 Travel, conferences, and meetings	8,238.			8,238.
	22 Printing and publications				
	23 Other expenses (attach schedule) See Line 23 Stmt	6,468.			6,468.
	24 Total operating and administrative expenses. Add lines 13 through 23	165,349.			163,849.
	25 Contributions, gifts, grants paid	109,972.			
26 Total expenses and disbursements. Add lines 24 and 25	275,321.			163,849.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-170,724.				
b Net investment income (if negative, enter -0-)		122,328.			
c Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
ASSETS	1 Cash – non-interest-bearing	7,115.	14,422.	14,422.
	2 Savings and temporary cash investments	27,505.	150,497.	150,497.
	3 Accounts receivable			
	Less: allowance for doubtful accounts			
	4 Pledges receivable			
	Less: allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7 Other notes and loans receivable (attach sch)			
	Less: allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments – U.S. and state government obligations (attach schedule) L-10a Stmt	219,428.	144,820.	166,629.
	b Investments – corporate stock (attach schedule) L-10b Stmt	1,634,926.	1,459,182.	1,857,360.
	c Investments – corporate bonds (attach schedule) L-10c Stmt	677,270.	627,310.	658,958.
	11 Investments – land, buildings, and equipment: basis			
Less: accumulated depreciation (attach schedule)				
12 Investments – mortgage loans				
13 Investments – other (attach schedule) L-13 Stmt	23,497.	23,497.	28,103.	
14 Land, buildings, and equipment: basis				
Less: accumulated depreciation (attach schedule)				
15 Other assets (describe L-15 Stmt	500.	500.	500.	
16 Total assets (to be completed by all filers – see instructions. Also, see page 1, item I)	2,590,241.	2,420,228.	2,876,469.	
LIABILITIES	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe L-22 Stmt	2,182.	2,893.	
	23 Total liabilities (add lines 17 through 22)	2,182.	2,893.	
NET ASSETS OR FUND BALANCES	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	2,588,059.	2,417,335.	
	30 Total net assets or fund balances (see the instructions)	2,588,059.	2,417,335.	
	31 Total liabilities and net assets/fund balances (see the instructions)	2,590,241.	2,420,228.	

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	2,588,059.
2 Enter amount from Part I, line 27a	2	-170,724.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	2,417,335.
5 Decreases not included in line 2 (itemize)	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) –Part II, column (b), line 30	6	2,417,335.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a SEE STATEMENT I		P	Various	Various
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 1,015,801.		998,070.	17,731.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
a 0.	0.	0.	17,731.
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	2	17,731.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):			
If gain, also enter in Part I, line 8, column (c) (see the instructions). If (loss), enter -0- in Part I, line 8		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2009	239,772.	2,563,751.	0.093524
2008	257,863.	3,050,796.	0.084523
2007	269,968.	3,633,199.	0.074306
2006	280,714.	3,449,141.	0.081387
2005	281,639.	3,254,689.	0.086533

2 Total of line 1, column (d)	2	0.420273
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	0.084055
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	2,797,781.
5 Multiply line 4 by line 3	5	235,167.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,223.
7 Add lines 5 and 6	7	236,390.
8 Enter qualifying distributions from Part XII, line 4	8	163,849.

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 the instructions)

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary — see instr.)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1 2,447.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (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 2,447.
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 2,447.
6 Credits/Payments:		
a 2010 estimated tax pmts and 2009 overpayment credited to 2010	6a 965.	
b Exempt foreign organizations — tax withheld at source	6b	
c Tax paid with application for extension of time to file (Form 8868)	6c 0.	
d Backup withholding erroneously withheld.	6d	
7 Total credits and payments. Add lines 6a through 6d	7 965.	
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 1,482.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10 0.	
11 Enter the amount of line 10 to be: Credited to 2011 estimated tax Refunded	11	

Part VII-A Statements Regarding Activities

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

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Part VII-A Statements Regarding Activities (Continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>HTTP://CHAMIZA.ORG</u>	13	X	
14	The books are in care of <u>DONNA VOGEL</u> Telephone no <u>(505) 986-5044</u> Located at <u>1919 FIFTH ST, STE C SANTA FE NM</u> ZIP + 4 <u>87505</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 -Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year. <u>15</u>			
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If 'Yes,' enter the name of the foreign country <u></u>			

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 the instructions)? <input type="checkbox"/>	1b	
Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>		
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	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 <u>20__ , 20__ , 20__ , 20__</u>		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement -see the instructions.)	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. <u>20__ , 20__ , 20__ , 20__</u>		
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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010.)	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	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)? (see instructions) ☐ Yes ☒ No(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

Organizations relying on a current notice regarding disaster assistance check here ☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No

6b

If 'Yes' to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
DONNA VOGEL 1301 LUISA ST SANTA FE NM 87501	EXEC DIRECTOR 40.00	85,000.	6,000.	0.
BEVERLY SINGER 1301 LUISA ST SANTA FE NM 87501	VICE-PRES 1.00	0.	0.	0.
JAMES L PHILLIPS 1301 LUISA ST SANTA FE NM 87501	DIRECTOR 2.00	0.	0.	0.
See Information about Officers, Directors, Trustees, Etc.		0.	0.	0.

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

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

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

None

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

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

Part IX A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1	
2	
3	
4	

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

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

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a Average monthly fair market value of securities	1a	2,749,402.
b Average of monthly cash balances	1b	90,485.
c Fair market value of all other assets (see instructions)	1c	500.
d Total (add lines 1a, b, and c)	1d	2,840,387.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2 Acquisition indebtedness applicable to line 1 assets	2	
3 Subtract line 2 from line 1d	3	2,840,387.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	42,606.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,797,781.
6 Minimum investment return. Enter 5% of line 5	6	139,889.

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	139,889.
2a Tax on investment income for 2010 from Part VI, line 5	2a	2,447.
b Income tax for 2010. (This does not include the tax from Part VI.)	2b	
c Add lines 2a and 2b	2c	2,447.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	137,442.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	137,442.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	137,442.

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	163,849.
b Program-related investments—total from Part IX-B	1b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the:		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	163,849.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	0.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	163,849.

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				137,442.
2 Undistributed income, if any, as of the end of 2010:				
a Enter amount for 2009 only			0.	
b Total for prior years: 20 __, 20 __, 20 __				
3 Excess distributions carryover, if any, to 2010:				
a From 2005	122,467.			
b From 2006	110,335.			
c From 2007	92,019.			
d From 2008	106,293.			
e From 2009	112,109.			
f Total of lines 3a through e	543,223.			
4 Qualifying distributions for 2010 from Part XII, line 4: ► \$ 163,849.				
a Applied to 2009, but not more than line 2a				
b Applied to undistributed income of prior years (Election required — see instructions)				
c Treated as distributions out of corpus (Election required — see instructions)				
d Applied to 2010 distributable amount				
e Remaining amount distributed out of corpus	163,849.			
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	707,072.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount — see instructions		0.		
e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				137,442.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see instructions)	122,467.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	584,605.			
10 Analysis of line 9:				
a Excess from 2006	110,335.			
b Excess from 2007	92,019.			
c Excess from 2008	106,293.			
d Excess from 2009	112,109.			
e Excess from 2010	163,849.			

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)

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

Tax year	Prior 3 years				
(a) 2010	(b) 2009	(c) 2008	(d) 2007	(e) Total	
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 organization had \$5,000 or more in assets at any time during the year — see instructions.)**1 Information Regarding Foundation Managers:**

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

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc, (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

THE CHAMIZA FOUNDATION C/O DONNA VOGEL

1919 FIFTH STREET, SUITE C

SANTA FE

NM

87505

(505) 986-5044

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

APPLICATIONS-LETTER FORMAT WITH DESCRIPTIONS OF PROJECT, ETC.

c Any submission deadlines:

VARIES FROM YEAR TO YEAR; LATE MARCH AND JUNE; SEPTEMBER SITE VISITS

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

CULTURAL PRESERVATION AMONG THE NATIVE AMERICAN INDIAN POPULATION IN NM

Part XXV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
ZUNI PUEBLO P.O. BOX 1009 ZUNI NM 87327	N/A	PUBLIC	RECLAIMING ZUNI FARMING -	4,745.
ESPANOLA VALLEY HIGH SCHOOL P.O. DRAWER 2160 ESPANOLA NM 87532	N/A	PUBLIC	CULTURAL HERITAGE VIDEOS	1,250.
HEART MOUNTAIN PRISON PROJECT 1223 ST FRANCIS DRIVE SANTA FE NM 87505	N/A	PUBLIC	NATIVE AMERICAN TRAD ARTS	1,800.
LAGUNA DEPT OF EDUCATION BOX 191 LAGUNA NM 00000	N/A	PUBLIC	CULTURAL TREASURES PROJ	3,806.
KERES CHILDREN'S LEARNING CENTER P.O. BOX 1454 PENA BLANCA NM 87041	N/A	PUBLIC	KERES LANGUAGE PRESERVATION	15,000.
OHKAY OWINGEH BOYS & GIRLS CLUB P.O. BOX 1099 OHKAY OWINGEH NM 87566	N/A	PUBLIC	TRADITIONAL HORNO AND BREADMAKING	7,415.
OHKAY OWINGEH BOYS & GIRLS CLUB P.O. BOX 1099 OHKAY OWINGEH NM 87566	N/A	PUBLIC	TRADITIONAL REGALIA MAKING	7,805.
OHKAY OWINGEH DEPT OF EDUCATION P.O. BOX 1269 OHKAY OWINGEH NM 87566	N/A	PUBLIC	COMMUNITY TEWA LANGUAGE PROG	4,900.
OO-OONAH ART CENTER/TAOS DAY SCHOOL P.O. BOX 1853 TAOS PUEBLO NM 87571	N/A	PUBLIC	HERITAGE PROJECT	4,500.
See Line 3a statement				58,751.
Total			3a	109,972.
b Approved for future payment				
IAIA, CLE 83 AVAN NU PO RD SANTA FE NM 87508	N/A	PUBLIC	LANGUAGE CONFERENCE	1,550.
KEWA PUEBLO P.O. BOX 99 SANTO DOMINGO PUEBLO NM 87052	N/A	PUBLIC	TRADING POST PROJECT	5,000.
See Line 3b statement				41,200.
Total			3b	47,750.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1	Program service revenue:					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies . .					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities			14	86,866.	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory			18	17,731.	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue:					
a						
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)				104,597.	
13	Total. Add line 12, columns (b), (d), and (e)				13	104,597.

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

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

[illegible]

Form 990-PF, Page 1, Part I, Line 23

Line 23 Stmt

Other expenses:	Rev/Exp Book	Net Inv Inc	Adj Net Inc	Charity Disb
MISCELLANEOUS	433.			433.
INSURANCE	1,579.			1,579.
LICENSES/PERMITS	35.			35.
TELEPHONE	1,492.			1,492.
POSTAGE	261.			261.
SUPPLIES	434.			434.
DUES/SUBSCRIPTIONS	1,888.			1,888.
BANKING SVC	346.			346.
Total	6,468.			6,468.

Form 990-PF, Page 4, Part VII-A, Line 8a

States Registered In

NM - New Mexico

DE - Delaware

Form 990-PF, Page 6, Part VIII, Line 1

Information about Officers, Directors, Trustees, Etc.

(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
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> MARJORIE PHILLIPS ELLIOTT 1301 LUISA ST SANTA FE NM 87501	CHAIRMAN 3.00	0.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> ALICE PHILLIPS SWISTEL 1301 LUISA ST SANTA FE NM 87501	VICE CHAIR 1.00	0.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> DIANE REYNA 1301 LUISA ST SANTA FE NM 87501	PRESIDENT 2.00	0.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> HAYES LEWIS 1301 LUISA ST SANTA FE NM 87501	TREASURER 1.00	0.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> JOANN K PHILLIPS 1301 LUISA ST SANTA FE NM 87501	SECY/ASST TREAS 1.00	0.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> JONATHAN BATKIN 1301 LUISA ST SANTA FE NM 87501	ASST SECY 1.00	0.	0.	0.

Form 990-PF, Page 6, Part VIII, Line 1

Continued

Information about Officers, Directors, Trustees, Etc.

(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
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> ESTEVAN RAEL-GALVEZ 1301 LUISA ST SANTA FE NM 87501	DIRECTOR 1.00	0.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> TED JOJOLA 1301 LUISA ST SANTA FE NM 87501	DIRECTOR 1.00	0.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> MIA TOYA 1301 LUISA ST SANTA FE NM 87501	DIRECTOR 1.00	0.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> GIFFORD PHILLIPS 1301 LUISA ST SANTA FE NM 87501	DIRECTOR 1.00	0.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> BRIAN VALLO 1301 LUISA ST SANTA FE NM 87501	DIRECTOR 1.00	0.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> CYNTHIA CHAVEZ LAMAR 1301 LUISA ST SANTA FE NM 87501	DIRECTOR 1.00	0.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> AGNES M DILL 1301 LUISA ST SANTA FE NM 87501	LIFETIME DIRECTOR 1.00	0.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/> JOE S SANDO 1301 LUISA ST SANTA FE NM 87501	LIFETIME DIRECTOR 1.00	0.	0.	0.
Person <input checked="" type="checkbox"/> Business <input type="checkbox"/>				

Total

0. 0. 0.

Form 990-PF, Page 11, Part XV, line 3a

Line 3a statement

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Founda- tion status of re- cipient	Purpose of grant or contribution	Person or Business Checkbox Amount
a Paid during the year				
PICURIS PUEBLO	N/A		BISON PROJECT	Person or <input type="checkbox"/>
P.O. BOX 127				Business <input checked="" type="checkbox"/>
PENASCO NM 87553		PUBLIC		5,451.
PUEBLO OF COCHITI	N/A		COCHITI KERES ADULT LANG	Person or <input type="checkbox"/>
255 COCHITI ST				Business <input checked="" type="checkbox"/>
COCHITI PUEBLO NM 87072		PUBLIC		4,000.
PUEBLO OF ISLETA DEPT OF EDUCATION	N/A		CHILDREN'S SUMMER	Person or <input type="checkbox"/>
P.O. BOX 1270			LANGUAGE CAMP	Business <input checked="" type="checkbox"/>
ISLETA NM 87022		PUBLIC		5,200.
PUEBLO OF POJOAQUE	N/A		TEWA LANGUAGE PROGRAM	Person or <input type="checkbox"/>
78 CITIES OF GOLD RD				Business <input checked="" type="checkbox"/>
SANTA FE NM 87506		PUBLIC		4,150.
PUEBLO OF SAN FELIPE	N/A		CULTURAL ARTS PROJ	Person or <input type="checkbox"/>
P.O. BOX 4339				Business <input checked="" type="checkbox"/>
SAN FELIPE PUEBLO NM 87001		PUBLIC		4,000.
SANTA CLARA LIBRARY PROGRAM	N/A		ELDERS & PRESCHOOLERS	Person or <input type="checkbox"/>
P.O. BOX 580			TOGETHER	Business <input checked="" type="checkbox"/>
ESPANOLA NM 87532		PUBLIC		8,000.
SANTO DOMINGO PUEBLO	N/A		TRADITIONAL ARTS & CRAFTS	Person or <input type="checkbox"/>
P.O. BOX 99				Business <input checked="" type="checkbox"/>
SANTO DOMINGO NM 87052		PUBLIC		4,000.
TEWA WOMEN UNITED	N/A		FROM CRADLE TO CLAY	Person or <input type="checkbox"/>
P.O. BOX 397				Business <input checked="" type="checkbox"/>
SANTA CRUZ NM 87567		PUBLIC		4,000.
OHKAY OWINGEH DEPT OF EDUCATION	N/A		OHKAY OWINGEH LANGUAGE	Person or <input type="checkbox"/>
P.O. BOX 1269			CLASS	Business <input checked="" type="checkbox"/>
OHKAY OWINGEH NM 87553		PUBLIC		6,150.
PUEBLO OF POJOAQUE	N/A		TEWA LANGUAGE PROG	Person or <input type="checkbox"/>
78 CITIES OF GOLD RD				Business <input checked="" type="checkbox"/>
SANTA FE NM 87506		PUBLIC		3,800.
SANTO DOMINGO PUEBLO	N/A		KEWA RELIEF FUND	Person or <input type="checkbox"/>
P.O. BOX 99				Business <input checked="" type="checkbox"/>
SANTO DOMINGO PUEBLO NM 87052		PUBLIC		10,000.

Total

58,751.

Form 990-PF, Page 10, Part XV, line 3b

Line 3b statement

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Founda- tion status of re- cipient	Purpose of grant or contribution	Person or Business Checkbox Amount
b <i>Approved for future payment</i>				
POEH CENTER	N/A	PUBLIC	TRADITIONAL ART CLASSES	Person or <input type="checkbox"/> Business <input checked="" type="checkbox"/>
78 CITIES OF GOLD RD				12,000.
SANTA FE NM 87506				
SANTA CLARA PUEBLO	N/A	PUBLIC	6TH ANNUAL ELDER CONF	Person or <input type="checkbox"/> Business <input checked="" type="checkbox"/>
P.O. BOX 580				12,000.
ESPANOLA NM 87532				
MUSEUM OF INDIAN ARTS	N/A	PUBLIC	PUEBLO LIFEWAYS	Person or <input type="checkbox"/> Business <input checked="" type="checkbox"/>
P.O. BOX 2087				10,000.
SANTA FE NM 87504				
SANTA FE INDIAN SCHOOL	N/A	PUBLIC	EMPOWERING YOUNG WOMEN	Person or <input type="checkbox"/> Business <input checked="" type="checkbox"/>
1501 CERRILLOS RD				7,200.
SANTA FE NM 87501				

Total

41,200.

Form 990-PF, Page 1, Part I

Line 16a - Legal Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CT CORPORATION	LEGAL	556.			

Total

556.

Form 990-PF, Page 1, Part I

Line 16b - Accounting Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CAROLYN H GONZALES	CONSULTING/TAX/ACCTG	4,204.			

Total

4,204.

Form 990-PF, Page 1, Part I

Line 16c - Other Professional Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
JP CONSULTING	INVESTMENT MANAGEMENT	26,629.			
TANABE SYSTEMS	INTERNET SERVICES	2,030.			
THUNDERBOLT	INTERNET SERVICES	329.			
KABOTIE CONSULTING	BOARD RETREAT	4,311.			
Total		<u>33,299.</u>			

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

L-10a Stmt

Line 10a - Investments - US and State Government Obligations:	End of Year		End of Year	
	State and Local Obligations Book Value	State and Local Obligations FMV	US Government Obligations Book Value	US Government Obligations FMV
SEE STATEMENT II			144,820.	166,629.
Total			<u>144,820.</u>	<u>166,629.</u>

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

L-10b Stmt

Line 10b - Investments - Corporate Stock:	End of Year	
	Book Value	Fair Market Value
SEE STATEMENT II	1,459,182.	1,857,360.
Total	<u>1,459,182.</u>	<u>1,857,360.</u>

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

L-10c Stmt

Line 10c - Investments - Corporate Bonds:	End of Year	
	Book Value	Fair Market Value
SEE STATEMENT II	627,310.	658,958.
Total	<u>627,310.</u>	<u>658,958.</u>

Form 990-PF, Page 2, Part II, Line 13

L-13 Stmt

Line 13 - Investments - Other:	End of Year	
	Book Value	Fair Market Value
SEE STATEMENT II	23,497.	28,103.

Form 990-PF, Page 2, Part II, Line 13

Continued

L-13 Stmt

Line 13 - Investments - Other:	End of Year	
	Book Value	Fair Market Value
Total	<u>23,497.</u>	<u>28,103.</u>

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

Other Assets Stmt

Line 15 - Other Assets:	Beginning Year Book Value	End of Year	
		Book Value	Fair Market Value
SECURITY DEPOSIT	500.	500.	500.
Total	<u>500.</u>	<u>500.</u>	<u>500.</u>

Form 990-PF, Page 2, Part II, Line 22

Other Liab Stmt

Line 22 - Other Liabilities:	Beginning Year Book Value	Ending Year Book Value
PAYROLL	2,182.	2,893.
Total	<u>2,182.</u>	<u>2,893.</u>