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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2010

For calendar year 2010, or tax year beginning 04-01-2010 , and ending 03-31-2011

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
LOEB FAMILY FOUNDATION INC
C/O REGIONS MORGAN KEEGAN TRUST

A Employer identification number
63-0960783

Number and street (or P O box number if mail is not delivered to street address) PO BOX 2450 | Room/suite

B Telephone number (see page 10 of the instructions)
(334) 230-6100

City or town, state, and ZIP code
MONTGOMERY, AL 361022450

C If exemption application is pending, check here ☐
D 1. Foreign organizations, check here ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ☐
E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 5,676,980

J Accounting method ☑ Cash ☐ Accrual ☐ Other (specify) _ *(Part I, column (d) must be on cash basis.)*

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))*

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	201,703	201,703		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	37,140			
	b	Gross sales price for all assets on line 6a 366,564				
	7	Capital gain net income (from Part IV, line 2)		37,140		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	238,843	238,843		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	4,088	0		0
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	980	0		0
	c	Other professional fees (attach schedule)	25,850	0		0
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions)	7,406	0		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	38,324	0		0
	25	Contributions, gifts, grants paid	278,021			278,021
	26	**Total expenses and disbursements.** Add lines 24 and 25	316,345	0		278,021
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-77,502			
	b	**Net investment income** (if negative, enter -0-)		238,843		
	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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	1		
	2	Savings and temporary cash investments	178,495	-12,083	-12,083
	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 page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	2,467,689	2,643,457	3,599,534
	c	Investments—corporate bonds (attach schedule)	2,009,586	1,940,707	2,089,529
	11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	4,655,771	4,572,081	5,676,980
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	0	0	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here** ▶ ☐ **and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☑ **and complete lines 27 through 31.**			
	27	Capital stock, trust principal, or current funds	3,072,791	3,072,791	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	1,582,980	1,499,290	
	30	**Total net assets or fund balances** (see page 17 of the instructions)	4,655,771	4,572,081	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	4,655,771	4,572,081	

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	4,655,771
2	Enter amount from Part I, line 27a	2	-77,502
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	4,578,269
5	Decreases not included in line 2 (itemize) ▶	5	6,188
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	4,572,081

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	See Additional Data Table			
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	See Additional Data Table			
b				
c				
d				
e				

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
a	See Additional Data Table			
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	37,140
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2009	238,010	5,115,391	0 046528
2008	241,100	5,116,354	0 047123
2007	303,070	6,479,267	0 046775
2006	273,993	5,579,513	0 049107
2005	239,897	5,406,916	0 044369

2	**Total** of line 1, column (d)	2	0 233902
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 046780
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	5,413,302
5	Multiply line 4 by line 3	5	253,234
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,388
7	Add lines 5 and 6	7	255,622
8	Enter qualifying distributions from Part XII, line 4	8	278,021

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter ______ (attach copy of letter if necessary–see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☑ and enter 1% of Part I, line 27b	1	2,388
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	0
3	Add lines 1 and 2	3	2,388
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	2,388
6	Credits/Payments		
a	2010 estimated tax payments and 2009 overpayment credited to 2010 — 6a — 2,040		
b	Exempt foreign organizations—tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments Add lines 6a through 6d	7	2,040
8	Enter any **penalty** for underpayment of estimated tax Check here ☑ if Form 2220 is attached	8	21
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed**	9	369
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**	10	
11	Enter the amount of line 10 to be **Credited to 2011 estimated tax** ▶ — **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		No
	If the answer is "Yes" to **1a** *or* **1b,** *attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
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.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶AL			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

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

		Line	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶REGIONS BANK TRUST DEPARTMENT Telephone no ▶(334) 230-6171

Located at ▶201 MONROE STREET 4TH FLOOR MONTGOMERY AL ZIP+4 ▶36104

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 | |

		Line	Yes	No
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		No

See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ▶

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

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

		Line	Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ **Yes** ☑ **No**			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ **Yes** ☑ **No**			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ **Yes** ☑ **No**			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ **Yes** ☑ **No**			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ **Yes** ☑ **No**			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ **Yes** ☑ **No**			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? ☐ **Yes** ☑ **No**			
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see page 20 of the instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ **Yes** ☑ **No**			
b	If "Yes," did it have excess business holdings in 2010 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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 page 22 of the instructions) ☐ Yes ☑ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No

b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? **5b**

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** No

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? **7b**

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
See Additional Data Table				

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

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

Total number of other employees paid over $50,000 ▶ 0

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

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

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
NONE		

Total number of others receiving over $50,000 for professional services. . . . . ▶	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	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See page 24 of the instructions 3	
Total. Add lines 1 through 3. . . . . ▶	0

Part X **Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	5,409,409
b	Average of monthly cash balances	1b	86,329
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	5,495,738
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	5,495,738
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	82,436
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	5,413,302
6	**Minimum investment return.** Enter 5% of line 5	6	270,665

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

1	Minimum investment return from Part X, line 6	1	270,665
2a	Tax on investment income for 2010 from Part VI, line 5 — 2a: 2,388		
b	Income tax for 2010 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	2,388
3	Distributable amount before adjustments Subtract line 2c from line 1	3	268,277
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	268,277
6	Deduction from distributable amount (see page 25 of the instructions)	6	0
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	268,277

Part XII **Qualifying Distributions** (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	278,021
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	278,021
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	2,388
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	275,633

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

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

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				268,277
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only.			12,302	
b Total for prior years 20___ , 20___ , 20___		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 ▶ $ 278,021				
a Applied to 2009, but not more than line 2a			12,302	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .	0			
d Applied to 2010 distributable amount.				265,719
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2010 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	0			0
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . .		0		
e Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
f Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011				2,558
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)	0			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions)	0			
9 **Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2006. . . .				
b Excess from 2007. . . .				
c Excess from 2008. . . .				
d Excess from 2009. . . .				
e Excess from 2010. . . .				

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

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2010	**(b)** 2009	**(c)** 2008	**(d)** 2007	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon **a** "Assets" alternative test—enter **(1)** Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 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 page 27 of the instructions.)

1 Information Regarding Foundation Managers:

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

See Additional Data Table

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

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

Check here ▶ ☑ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

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

c Any submission deadlines

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

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				278,021
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities. . . .			14	201,703	
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	37,140	
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). .		0		238,843	0

13 Total. Add line 12, columns (b), (d), and (e). **13** 238,843

(See worksheet in line 13 instructions on page 28 to verify calculations)

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

Line No.	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)

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

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash	1a(1)		No
(2) Other assets	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
(3) Rental of facilities, equipment, or other assets	1b(3)		No
(4) Reimbursement arrangements	1b(4)		No
(5) Loans or loan guarantees	1b(5)		No
(6) Performance of services or membership or fundraising solicitations	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		No

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

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☑ No

b If "Yes," complete the following schedule

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

Sign Here

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

****** | 2011-05-15 | ******
Signature of officer or trustee | Date | Title

Paid Preparer's Use Only

		Date	Check if self-employed ☐	PTIN
Preparer's Signature	RITA O BROWN	2011-05-24		
Firm's name	JACKSON THORNTON & CO PC		Firm's EIN	
Firm's address	P O BOX 96 MONTGOMERY, AL 361010096		Phone no (334) 834-7660	

Additional Data

Software ID:
Software Version:
EIN: 63-0960783
Name: LOEB FAMILY FOUNDATION INC
C/O REGIONS MORGAN KEEGAN TRUST

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

	(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)
A	CREE INC	P	2010-09-30	2010-12-08
B	FEDERAL NATL MTGE ASSN POOL	P	2007-11-14	2010-11-26
C	GENERAL MOTORS	P	2010-11-18	2010-11-22
D	ING GROUP	P	2008-09-02	2010-05-19
E	ISHARES LEHMAN US TREASURY	P	2004-08-13	2010-10-27
F	MERCK & CO	P	2008-10-29	2010-08-18

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

	(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	41,118		32,685	8,433
B	19,340		19,410	-70
C	23,834		23,100	734
D	58,688		65,910	-7,222
E	110,808		104,138	6,670
F	112,776		84,181	28,595

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
A				8,433
B				-70
C				734
D				-7,222
E				6,670
F				28,595

Form 990PF Part VIII Line 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
REGIONS BANK TRUST DEPARTMENT 60 COMMERCE STREET MONTGOMERY, AL 36104	TRUSTEE 2 00	4,088	0	0
JAMES L LOEB 2244 FERNWAY DRIVE MONTGOMERY, AL 36111	BOARD OF DIRECTORS 0 00	0	0	0
JOAN B LOEB 2244 FERNWAY DRIVE MONTGOMERY, AL 36111	BOARD OF DIRECTORS 0 00	0	0	0
ELIZABETH L FRIEDMAN 1306 WASHINGTON AVENUE SANTA MONICA, CA 90403	BOARD OF DIRECTORS 0 00	0	0	0
HELEN R LOEB 2921 CANTERBURY COURT MONTGOMERY, AL 36111	BOARD OF DIRECTORS 0 00	0	0	0
PATRICIA L ROSENBAUM 4278 LAKEHAVEN DRIVE NE ATLANTA, GA 30319	BOARD OF DIRECTORS 0 00	0	0	0
JAMES L LOEB JR 2244 FERNWAY DRIVE MONTGOMERY, AL 36111	BOARD OF DIRECTORS 0 00	0	0	0

Form 990PF Part XV Line 1a - 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).

JAMES L LOEB
JOAN B LOEB

Form 990PF Part XV Line 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*				
AIM PO BOX 986 MONTGOMERY,AL 361010986			HUMANITARIAN	200
A-PLUS EDUCATION PO BOX 4433 MONTGOMERY,AL 36103			EDUCATIONAL	200
ALABAMA PUBLIC TELEVISION PO BOX 2153 BIRMINGHAM,AL 35287			EDUCATIONAL	240
ALABAMA SHAKESPEARE FESTIVAL 1 FESTIVAL DRIVE MONTGOMERY,AL 36117			CULTURAL/EDUCATIONAL	20,500
ALABAMA TRUST FOR HISTORIC PRESERVATION STATION 45 LIVINGSTON,AL 35470			CULTURAL/EDUCATIONAL	300
ALLIANCE THEATRE COMPANY 1280 PEACHTREE STREET NE ATLANTA,GA 30309			CULTURAL/EDUCATIONAL	4,500
AMERICAN CANCER SOCIETY 3054 MCGEHEE ROAD MONTGOMERY,AL 36111			HUMANITARIAN	100
AMERICAN JEWISH COMMITTEE 165 EAST 56TH STREET NEW YORK,NY 10022			RELIGIOUS	2,000
AMERICAN LUNG ASSOCIATION PO BOX 7000 ALBERT LEQ,MN 56007			HUMANITARIAN	100
AMERICAN PARKINSONS DISEASE ASSOCIATION 135 PARKINSON AVENUE STATEN ISLAND,NY 10305			HUMANITARIAN	250
AMNESTY INTERNATIONAL 5 PENN PLAZA NEW YORK,NY 10001			CULTURAL/EDUCATIONAL	500
ATLANTA HISTORY CENTER 130 WEST PACES FERRY ROAD NW ATLANTA,GA 30305			EDUCATIONAL	500
ATLANTA SPEECH SCHOOL 3160 NORTHSIDE PARKWAY NW ATLANTA,GA 30327			EDUCATIONAL	500
ATLANTA SYMPHONY ORCHESTRA 1293 PEACHTREE STREET NE SUITE 300 ATLANTA,GA 30309			CULTURAL/EDUCATIONAL	1,500
AWAC PO BOX 244023 MONTGOMERY,AL 361244023			HUMANITARIAN	250
Total . . . . ▶ 3a				278,021

Form 990PF Part XV Line 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*				
BABSON COLLEGE 231 FOREST STREET BABSON PARK, MA 02457			EDUCATIONAL	1,100
BIG SUNDAY 6111 MELROSE AVENUE LOS ANGELES, CA 90038			HUMANITARIAN	500
BOSTON UNIVERSITY PO BOX 4112 BOSTON, MA 02211			EDUCATIONAL	100
BOY SCOUTS OF AMERICA-TUKABATCHEE 3067 CARTER HILL ROAD MONTGOMERY, AL 36111			HUMANITARIAN	600
BOYS AND GIRLS CLUB 5995 CHRISTY LANE MONTGOMERY, AL 36116			CULTURAL/EDUCATIONAL	300
BRADY CENTER TO PREVENT GUN VIOLENCE PO BOX 96627 WASHINGTON, DC 20090			HUMANITARIAN	600
BRANTWOOD CHILDREN'S HOME 1309 UPPER WETUMPKA ROAD MONTGOMERY, AL 36107			HUMANITARIAN	500
BRIGHT STAR SCHOOL 2636 MANSFIELD AVENUE LOS ANGELES, CA 90016			EDUCATIONAL	500
CAMI (NATIONAL ALLIANCE FOR THE MENTALLY ILL) 3803 N FAIRFAX DRIVE SUITE 100 ARLINGTON, VA 22203			HUMANITARIAN	500
CAMP ASCCA COUNTY ROAD 83 JACKSON GAP, AL 36861			CULTURAL/EDUCATIONAL	200
CAPRI COMMUNITY FILM SOCIETY 1045 EAST FAIRVIEW AVENUE MONTGOMERY, AL 36117			CULTURAL/EDUCATIONAL	425
CARE ALABAMA 2544 WILLOW POINT ROAD ALEXANDER CITY, AL 35011			HUMANITARIAN	200
CHILD PROTECT 935 SOUTH PERRY STREET MONTGOMERY, AL 36104			HUMANITARIAN	300
CHILDRENS DEFENSE FUND 25 E STREET NW WASHINGTON, DC 20001			HUMANITARIAN	150
COLONIAL WILLIAMSBURG FOUNDATION PO BOX 1776 WILLIAMSBURG, VA 23187			CULTURAL/EDUCATIONAL	250
Total . . . . ▶ **3a**				278,021

Form 990PF Part XV Line 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*				
DOCTORS WITHOUT BORDERS 333 7TH AVENUE 2ND FLOOR NEW YORK, NY 10001			HUMANITARIAN	500
ECHO HORIZON SCHOOL 3430 MCMANUS AVENUE CULVER CITY, CA 90232			EDUCATIONAL	1,335
EMORY EYE INSTITUTE 875 JOHNSON FERRY ROAD NE ATLANTA, GA 30342			EDUCATIONAL	1,500
FIRST WHITE HOUSE OF THE CONDEDERACY 644 WASHINGTON AVENUE MONTGOMERY, AL 36104			CULTURAL/EDUCATIONAL	100
FOCAL 3703 ROSA L PARKS AVENUE MONTGOMERY, AL 36105			HUMANITARIAN	50
FRIENDS OF FERNBANK 767 CLIFTON ROAD NE ATLANTA, GA 30307			CULTURAL/EDUCATIONAL	250
FRIENDS OF MONTGOMERY PUBLIC LIBRARY 245 HIGH STREET MONTGOMERY, AL 36101			CULTURAL/EDUCATIONAL	200
GEORGE WEST MENTAL HEALTH FOUNDATION 1903 NORTH DRUID HILLS ROAD ATLANTA, GA 30319			HUMANITARIAN	1,000
HIGH MUSEUM OF ART 1280 PEACHTREE STREET NE ATLANTA, GA 30309			CULTURAL/EDUCATIONAL	1,000
HOSPICE OF MONTGOMERY 1111 HOLLOWAY PARK MONTGOMERY, AL 36117			HUMANITARIAN	250
INTERFAITH ALLIANCE 1212 NEW YORK AVENUE NW SUITE 1250 WASHINGTON, DC 20005			HUMANITARIAN	150
JEWISH CHAUTAUQUA SOCIETY 633 3RD AVENUE FL 7 NEW YORK, NY 10164			RELIGIOUS	100
JEWISH CHILDREN'S REGIONAL SERVICES PO BOX 7368 METAIRIE, LA 70010			RELIGIOUS	200
JEWISH FEDERATION PO BOX 54269 LOS ANGELES, CA 90054			RELIGIOUS	1,700
JEWISH FEDERATION OF CENTRAL ALABAMA PO BOX 20058 MONTGOMERY, AL 36120			RELIGIOUS	20,000
Total . . . . ▶ **3a**				278,021

Form 990PF Part XV Line 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*				
JEWISH FEDERATION OF GREATER ATLANTA 1440 SPRING STREET NW ATLANTA, GA 30309			RELIGIOUS	1,000
JOY TO LIFE 5401 TAYLOR ROAD MONTGOMERY, AL 36117			HUMANITARIAN	200
LANDMARKS FOUNDATION 301 COLUMBUS STREET MONTGOMERY, AL 36104			HUMANITARIAN	225
LOS ANGELES COUNTY MUSEUM OF ART 5905 WILSHIRE BLVD LOS ANGELES, CA 90036			CULTURAL/EDUCATIONAL	500
LOS ANGELES LIBARY FOUNDATION 630 WEST FIFTH STREET LOS ANGELES, CA 90071			CULTURAL/EDUCATIONAL	250
LOS ANGELES REGIONAL FOODBANK 1734 EAST 41ST STREET VERNON, CA 90058			HUMANITARIAN	1,000
MEDICAL OUTREACH MINISTRIES 1301 EAST SOUTHERN BLVD MONTGOMERY, AL 36116			HUMANITARIAN	200
MERCY COPRS (HAITI) PO BOX 2669 PORTLAND, OR 97208			HUMANITARIAN	100
METROPOLITAN MUSEUM OF ART 1000 FIFTH AVENUE NEW YORK, NY 10130			CULTURAL/EDUCATIONAL	50
MIRACLE FLIGHTS FOR KIDS 2764 NORTH GREEN VALLEY PARKWAY 115 GREEN VALLEY, NV 89014			HUMANITARIAN	100
MMFA - COLLECTOR'S SOCIETY 1 MUSEUM DRIVE MONTGOMERY, AL 36117			CULTURAL/EDUCATIONAL	250
MONTGOMERY CHAMBER MUSIC ORG PO BOX 6454 MONTGOMERY, AL 36106			CULTURAL/EDUCATIONAL	500
MONTGOMERY CHORALE 315 CLANTON AVENUE MONTGOMERY, AL 36104			CULTURAL/EDUCATIONAL	200
MONTGOMERY COUNTY HISTORICAL SOCIETY PO BOX 1829 MONTGOMERY, AL 36102			CULTURAL/EDUCATIONAL	50
MONTGOMERY MUSEUM OF FINE ARTS 1 MUSEUM DRIVE MONTGOMERY, AL 36117			CULTURAL/EDUCATIONAL	2,500
Total . . . . ▶ **3a**				278,021

Form 990PF Part XV Line 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*				
MONTGOMERY SYMPHONY ASSOC 301 NORTH HULL STREET MONTGOMERY, AL 36104			CULTURAL/EDUCATIONAL	5,000
MONTGOMERY ZOO 2301 COLISEUM PARK MONTGOMERY, AL 36110			CULTURAL/EDUCATIONAL	200
NAMI MONTGOMERY 437 MULLIGAN DRIVE MONTGOMERY, AL 36117			HUMANITARIAN	600
NATIONAL TRUST FOR HISTORIC PRESERVATION PO BOX 5043 HAGERSTOWN, MD 21741			CULTURAL/EDUCATIONAL	500
NEW ISRAEL FUND 330 SEVENTH AVENUE 11 FLOOR NEW YORK, NY 10001			RELIGIOUS	400
OXFAM PO BOX 7011 ALBERT LEA, MN 56007			HUMANITARIAN	250
PACE ACADEMY 966 WEST PACES FERRY ROAD NW ATLANTA, GA 30327			EDUCATIONAL	3,000
PLANNED PARENTHOOD PO BOX 60677 LOS ANGELES, CA 90060			HUMANITARIAN	250
PROJECT HOPE 255 CARTER HALL LANE MILLWOOD, VA 22646			HUMANITARIAN	200
SALVATION ARMY PO BOX 210307 MONTGOMERY, AL 36121			HUMANITARIAN	1,200
SPLC 400 WASHINGTON AVENUE MONTGOMERY, AL 36104			CULTURAL/EDUCATIONAL	100
ST JAMES SCHOOL 6010 VAUGHN ROAD MONTGOMERY, AL 36116			EDUCATIONAL	6,000
SUNSHINE CENTER PO BOX 5160 MONTGOMERY, AL 36103			HUMANITARIAN	250
TEMPLE BETH OR 2246 ANRROW LANE ROAD MONTGOMERY, AL 36106			RELIGIOUS	158,850
TEMPLE ISAIAH 10345 W PICO BLVD LOS ANGELES, CA 90064			RELIGIOUS	4,336
Total . . . . ▶ **3a**				278,021

Form 990PF Part XV Line 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*				
TEMPLE SINAI 5645 DUPRESS DRIVE NW ATLANTA, GA 30327			RELIGIOUS	3,500
TROY STATE RADIO 252 MONTGOMERY STREET MONTGOMERY, AL 36104			CULTURAL/EDUCATIONAL	200
TULANE UNIVERSITY 200 BROADWAY STREET SUITE 209 NEW ORLEANS, LA 70118			EDUCATIONAL	1,000
UNITED WAY OF METRO ATLANTA PO BOX 2692 ATLANTA, GA 30301			HUMANITARIAN	1,500
UNIVERSITY OF NORTH CAROLINA - CHAPEL HILL 208 W FRANKLIN STREET CHAPEL HILL, NC 27599			EDUCATIONAL	250
WELLESLEY COLLEGE 106 CENTRAL ST WELLESLEY, MA 02481			EDUCATIONAL	1,750
WESTSIDE FAMILY YMCA 11311 LA GRANGE AVENUE LOS ANGELES, CA 90025			CULTURAL/EDUCATIONAL	2,760
WESTSIDE FOOD BANK 1712 22NS STREET SANTA MONICA, CA 90404			HUMANITARIAN	500
WINTERTHUR MUSEUM ROUTE 52 KENNETT PIKE WINTERTHUR, DE 19735			CULTURAL/EDUCATIONAL	100
WINWARD SCHOOL 11350 PALMS BLVD LOS ANGELES, CA 90066			EDUCATIONAL	7,000
YOUNG AUDIENCES OF ATLANTA 1280 PEACHTREE STREET NE ATLANTA, GA 30309			CULTURAL/EDUCATIONAL	4,500
ZABAN NIGHT SHELTER 1589 PEACHTREE STREET NE ATLANTA, GA 30309			HUMANITARIAN	500
Total . . . . ▶ **3a**				278,021

TY 2010 Accounting Fees Schedule

Name: LOEB FAMILY FOUNDATION INC
C/O REGIONS MORGAN KEEGAN TRUST

EIN: 63-0960783

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREP FEE	980	0		0

TY 2010 Investments Corporate Bonds Schedule

Name: LOEB FAMILY FOUNDATION INC
C/O REGIONS MORGAN KEEGAN TRUST

EIN: 63-0960783

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS	1,940,707	2,089,529

TY 2010 Investments Corporate Stock Schedule

Name: LOEB FAMILY FOUNDATION INC
C/O REGIONS MORGAN KEEGAN TRUST

EIN: 63-0960783

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK	2,643,457	3,599,534

TY 2010 Other Decreases Schedule

Name: LOEB FAMILY FOUNDATION INC
C/O REGIONS MORGAN KEEGAN TRUST

EIN: 63-0960783

Description	Amount
ADJUST FOR AMORTIZATION WHICH REDUCED COST	6,188

TY 2010 Other Professional Fees Schedule

Name: LOEB FAMILY FOUNDATION INC
C/O REGIONS MORGAN KEEGAN TRUST

EIN: 63-0960783

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEE	25,850	0		0

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TY 2010 Taxes Schedule

Name: LOEB FAMILY FOUNDATION INC
C/O REGIONS MORGAN KEEGAN TRUST

EIN: 63-0960783

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES WITHHELD	3,718	0		0
FORM 990PF BAL DUE & ESTIMATES	3,688	0		0