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Form **990-PF**

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.

2010

			1 2010	,	777 20 001				
		ndar year 2010, or tax year beginning MAY		, and ending	APR 30, 2013				
G	Chec	call that apply: Initial return		rmer public charity	Final retur	n			
	Amended returnAddress changeName change								
Name of foundation A Employer identification number									
	THE WILLIAM H.G. FITZGERALD FAMILY								
<u> </u> -		FOUNDATION			52-2097034				
Nu	mber a	and street (or P O box number if mail is not delivered to street	•	Room/surte	B Telephone number				
<u> </u>			NW		202-332-54	101			
Cr	y or t	own, state, and ZIP code			C if exemption application is	· —			
L		WASHINGTON, DC 20008			D 1. Foreign organization				
H_	_	type of organization: X Section 501(c)(3) ex	• •		Foreign organizations m check here and attach c	omputation .			
<u>_</u> _			Other taxable private founda	tion	E If private foundation sta	atus was terminated			
		arket value of all assets at end of year J Accounti	_	Accrual	under section 507(b)(1)(A), check here			
		Part II, col. (c), line 16)	her (specify)		F If the foundation is in a				
	<u>\$</u>	2,794,142. (Part I, colu	mn (d) must be on cash b	oasis.)	under section 507(b)(1)(B), check here			
P	art l	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements for charitable purposes			
		necessarily equal the amounts in column (a))	expenses per books	income	ıncome	(cash basis only)			
	1	Contributions, gifts, grants, etc., received	61.		N/A	ļ			
	2	Check X of the foundation is not required to attach Sch. B			,				
	3	Interest on savings and temporary cash investments	178.	178.		STATEMENT 1			
	4	Dividends and interest from securities	2,696.	2,696.		STATEMENT 2			
	5a	Gross rents				,			
	b	Net rental income or (loss)				<u> </u>			
٠	6a	Net gain or (loss) from sale of assets not on line 10	26,842.			STATEMENT 3			
Revenue	b	Gross sales price for all assets on line 6a			,				
Š	7	Capital gain net income (from Part IV, line 2)	<u> </u>	26,653.		,			
Œ	8	Net short-term capital gain				·			
	19=	Income modifications				<u> </u>			
	Į į̇̀Da	fincome modifications Gross caps respirations EID and allowances				` ,			
	b	1			· · · · · · · · · · · · · · · · · · ·				
	18	Grosspirpfit og (logs) 2.0.11							
	1)	Other income							
	12	Compensation of onicers, chippetors, trusties, etc	<u>29,777.</u>	29,527.					
	13	Compensation of officers, directors, trustees, etc	0.	0.		0.			
	14	Other employee salaries and wages							
•	15	Pension plans, employee benefits							
368	16a	Legal fees		·					
ben	b	Accounting fees STMT 4	1,875.	1,875.	· · · · · · · · · · · · · · · · · · ·	0.			
JIIV Administrative Expenses	C	Other professional fees STMT 5	2,837.	2,837.		0.			
<u>§</u>	17	Interest							
trat	18	Taxes STMT 6	248.	0.	····	0.			
nis .	19	Depreciation and depletion							
Admir of	20	Occupancy			· · · · · · · · · · · · · · · · · · ·				
		Travel, conferences, and meetings							
9 5 7011 Operating and	22	Printing and publications							
πë	23	Other expenses							
S E E	24	Total operating and administrative							
ağ		expenses. Add lines 13 through 23	4,960.	4,712.		0.			
0	25	Contributions, gifts, grants paid	100,000.			100,000.			
	26	Total expenses and disbursements.							
		Add lines 24 and 25	104,960.	4,712.		100,000.			
	27	Subtract line 26 from line 12:							
	a	Excess of revenue over expenses and disbursements	-75,183.						
	b	Net investment income (if negative, enter -0-)		24,815.					
	C	Adjusted net income (if negative, enter -0-)			N/A				

LHA For Paperwork Reduction Act Notice, see the instructions.

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52-2097034

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only			Beginning of year	End o	f year				
P	aπ	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value				
	1	Cash - non-interest-bearing							
	2	Savings and temporary cash investments	9,873.	12,141.	12,141.				
	3								
		Less; allowance for doubtful accounts ▶							
	4	Pledges receivable ►							
	'	Less: allowance for doubtful accounts ▶							
	5	Grants receivable							
	6	Receivables due from officers, directors, trustees, and other							
	-	disqualified persons							
	7	Other notes and loans receivable							
	ľ	Less; allowance for doubtful accounts							
ø	8	Inventories for sale or use							
Assets	9	Prepaid expenses and deferred charges							
As	1 -	Investments - U.S. and state government obligations							
	1	Investments - corporate stock STMT 8	28,315.	0.	0.				
		Investments - corporate bonds	20,3231						
	[Investments - land, buildings, and equipment basis							
	l''	Less accumulated depreciation							
	12	Investments - mortgage loans							
	13	Investments - other STMT 9	2,050,786.	2,001,867.	2,781,738.				
		Land, buildings, and equipment basis	2/030//001	2,001,0070	2773277300				
		Less accumulated depreciation	}						
	15	Other assets (describe STATEMENT 10)	480.	263.	263.				
	13	Outer assets (describe > DIFFICIENT TO)		2031					
	16	Total assets (to be completed by all filers)	2,089,454.	2 014 271	2,794,142.				
_	_	Accounts payable and accrued expenses	2/005/252.	2,011,2,11					
	18	Grants payable							
ø,	19	Deferred revenue							
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons							
ğ	I	Mortgages and other notes navable							
Ë	ı	Other liabilities (describe)							
	23	Total fiabilities (add lines 17 through 22)	0.	0.					
		Foundations that follow SFAS 117, check here							
	ļ	and complete lines 24 through 26 and lines 30 and 31.		į					
98	24	Unrestricted							
auc	25	Temporarily restricted							
Bal	1	Permanently restricted							
or Fund Balances		Foundations that do not follow SFAS 117, check here							
Ŧ		and complete lines 27 through 31.							
	27	Capital stock, trust principal, or current funds	0.	0.					
sets	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.					
Net Assets	29	Retained earnings, accumulated income, endowment, or other funds	2,089,454.	2,014,271.	STATEMENT 7				
det	1	Total net assets or fund balances	2,089,454.	2,014,271.					
_			1						
	31	Total liabilities and net assets/fund balances	2,089,454.	2,014,271.					
<u> </u>	Part III Analysis of Changes in Net Assets or Fund Balances								
	arı	III Analysis of changes in Net Assets of Fand Be							
		net assets or fund balances at beginning of year - Part II, column (a), line 3	30						
(must agree with end-of-year figure reported on prior year's return)				. 1	2,089,454.				
		amount from Part I, line 27a		2	<u>-75,183.</u>				
		r increases not included in line 2 (itemize)			0.				
		ines 1, 2, and 3		4	2,014,271.				
		eases not included in line 2 (itemize)		5	0.				
<u>6</u>	Total	net assets or fund balances at end of year (line 4 minus line 5) - Part II, col	lumn (b), line 30	6	2,014,271.				
					Form 990-PF (2010)				

Part IV Capital Gains	and Losses fo	r Tax on In	vestmen	t Income						
	ribe the kind(s) of pr arehouse; or commo				P	How a - Purc - Don	cquired chase ation	(c) Date a (mo., da		(d) Date sold (mo., day, yr.)
1a BANK OF AMERIC	A 53-2002	6030495	6				P	VARIO	OUS	VARIOUS
b CAPITAL GAINS DIVIDENDS										
<u>c</u>					_					
<u>d</u>										
е					<u> </u>				<u></u>	<u> </u>
(e) Gross sales price	(f) Depreciation (or allows			st or other basis expense of sale					in or (loss (f) minus	
a 58,877.				32,62	20.					26,257.
ь 396.	<u> </u>									396.
С										
d			<u></u>							
e Complete and for any to show				40/04/60						
Complete only for assets showing) Gains (Co . (k), but n		
(i) F.M.V. as of 12/31/69	(j) Adjusted as of 12/3		\ ,	cess of col. (i) col. (j), if any			00.	Losses (from col. (h)) / 5.
				(j), uy						26,257.
a b										396.
C					+					
d										
e										
		ann also antar	n Dort Lline	7	7					
2 Capital gain net income or (net ca	pital loss)	gain, also enter (loss), enter -0-	ın Part I line	7	•	2				26,653.
3 Net short-term capital gain or (los	•			•	7					
If gain, also enter in Part I, line 8,	•	10115 1222(3) 8110	1 (0).]					
If (loss), enter -0- in Part I, line 8						3			N/A	
Part V Qualification U	nder Section	4940(e) for	Reduced	Tax on Net	Inve	estn	nent Inc	ome		
(For optional use by domestic private	foundations subject	to the section 49	940(a) tax or	ı net investment ir	ncome	-)				
If section 4940(d)(2) applies, leave th	ue nart hlank									
	•									
Was the foundation liable for the sect	-		, ,		riod?					Yes X No
If "Yes," the foundation does not qual 1 Enter the appropriate amount in 6										
1 Enter the appropriate amount in 6	acti column for eact		cuons before	making any enuit						(d)
Base period years	Adjuste	(b) d qualifying distr	ibutions	Net value of no	(c) Inchari	rtahle-	use assets			ùtion ratio
Calendar year (or tax year beginning	ig (n) Adjuste		2,293.	14Ct Value of 110			5,561		cor (o) aiv	ided by col. (c)) • 828358
<u>2009</u> 2008			9,840.		_		9,56 <u>1</u>			.323474
2007			,915.				3,30 <u>5</u>			.247354
2006			3,837.		2		1,956			.055913
2005			,118.				$\frac{1}{0},530$.029813
2003			,,110.			<u></u>	0,521	•		.025015
2 Total of line 1, column (d)								2		1.484912
3 Average distribution ratio for the 5	-vear hase period - (divide the total or	ine 2 hv 5	or hy the number	of vea	ırs				1.101912
the foundation has been in exister	-		,o 2 d y 0,	or by the namber	u, you			3		.296982
			•	•						
4 Enter the net value of noncharitab	le-use assets for 201	0 from Part X. III	ne 5					4		50,720.
							-			
5 Multiply line 4 by line 3								5		15,063.
						-				
6 Enter 1% of net investment incom	e (1% of Part I, line :	27b)						6		248.
		-· - ,					-			
7 Add lines 5 and 6								7		15,311.
	•		-				-			
8 Enter qualifying distributions from	Part XII, line 4					_	-	8_		100,000.
If line 8 is equal to or greater than		on Part VI. line 1	b, and comp	lete that part using	g a 1%	6 tax r	ate.			
See the Part VI instructions.	•	•		•	-					

Forn	1 990-PF (2010) FOUNDATION 52-2	<u> 2097034</u>	. F	age 4
Pa	irt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 -	see instru	uctior	ns)
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)			
þ	Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕨 🗶 and enter 1%		2	48.
	of Part I, line 27b			
C	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			_
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			<u>0.</u>
3	Add lines 1 and 2		2	48.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			<u>48.</u>
6	Credits/Payments:			
	2010 estimated tax payments and 2009 overpayment credited to 2010 6a 480.			
	Exempt foreign organizations - tax withheld at source	•		
	Tax paid with application for extension of time to file (Form 8868) 6c			
_	Backup withholding erroneously withhold Table and the state of the st		_	
7			5.	<u> 11.</u>
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8			
9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed			
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			<u>63.</u>
	Enter the amount of line 10 to be: Credited to 2011 estimated tax ▶ 263. Refunded ▶ 11 rt VII-A Statements Regarding Activities			0.
			Yes	No
14	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in	4-	163	
	any political campaign? Plut to spend more than \$100 during the user (other dureth) are indirectly) for political averages (see instructions for definition)?	1 <u>a</u>		$\frac{x}{x}$
ע	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or	1b		
	distributed by the foundation in connection with the activities.			
	Did the foundation file Form 1120-POL for this year?	4.		x
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:	1c		
u	(1) On the foundation. \$\Bigs\\$ \text{0.} \text{(2)} On foundation managers. \$\Bigs\\$ \text{0.}	-		
۵	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation		i	
-	managers. > \$ 0.			,
9	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		X
	If "Yes," attach a detailed description of the activities.	-	,	<u> </u>
	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or		1	
·	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
42	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
	If "Yes," has it filed a tax return on Form 990-T for this year?		$\neg \uparrow$	<u> </u>
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5	$-\dagger$	X
	If "Yes," attach the statement required by General Instruction T			
	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:	1		
	By language in the governing instrument, or		1	
	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	\mathbf{x}_{\perp}	
7	Did the foundation have at least \$5,000 in assets at any time during the year?	7	Х	
	If "Yes," complete Part II, col. (c), and Part XV.			
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)		}	
	DC _	_	1	
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	$\mathbf{x} \perp$	
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	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes " attach a schedule listing their names and addresses	10		X

Pa	art 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	P(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the four	ndation acquire a direct or indirect interest in any applicable insurance contract before			
	August 17,	2008?	12		X
13	Did the four	ndation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website ad	dress ▶ N/A			
14	The books	are in care of ► THE FOUNDATION Telephone no. ► 202-33	2-5	401	
	Located at	► SAME ADDRESS, WASHINGTON, DC ZIP+4 ►20	008		
15	Section 494	47(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		>	-
	and enter th	ne amount of tax-exempt interest received or accrued during the year	N	/A_	
16	At any time	during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, o	or other financial account in a foreign country?	16		X
	See page 2	0 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of			
	the foreign		<u> </u>		
Pa	art 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
12	During the	year did the foundation (either directly or indirectly):			}
	(1) Engage	e in the sale or exchange, or leasing of property with a disqualified person?	7		
	(2) Borrow	money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqu	valified person? Yes X No	'	. ,	
	(3) Furnish	n goods, services, or facilities to (or accept them from) a disqualified person?	` ;		1
	(4) Pay co	mpensation to, or pay or reimburse the expenses of, a disqualified person? Yes X No			
	(5) Transfe	er any income or assets to a disqualified person (or make any of either available			
	for the	benefit or use of a disqualified person)?			
	(6) Agree t	to pay money or property to a government official? (Exception. Check "No"			,
	ıf the fo	oundation agreed to make a grant to or to employ the official for a period after			
	termina	ation of government service, if terminating within 90 days.)			
b	If any answ	er is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			
	section 53.4	4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? N/A	1b		
	Organizatio	ns relying on a current notice regarding disaster assistance check here			
C	Did the four	ndation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected			
		irst day of the tax year beginning in 2010?	1c		<u> X</u>
2	Taxes on fa	ilure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation		į	
		ection 4942(j)(3) or 4942(j)(5)):			
а	At the end o	of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning		İ	
	before 2010	Yes X No		}	
		the years > , , , , , , , , ,		i	
b		ry years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect		Į	
		assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach]]		
		see instructions.)	2b		
C	If the provis	ions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	ļį		
_				1	
3a		idation hold more than a 2% direct or indirect interest in any business enterprise at any time			
	during the y	· · · · · · · · · · · · · · · · · · ·		1	
b		rt have excess business holdings in 2010 as a result of (1) any purchase by the foundation or disqualified persons after			
		69; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose			
		acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C,]	Ì	
		n, to determine if the foundation had excess business holdings in 2010.) N/A	3b		
		idation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		_X_
D		idation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that			v
_	nad not bee	n removed from jeopardy before the first day of the tax year beginning in 2010?	n 990	DE "	X 2010\

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Part VII-B Statements Regarding Activities for Which	Form 4720 May Be	Required (contin	nued)	
5a During the year did the foundation pay or incur any amount to:				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section)	ion 4945(e))?	Y	es X No))
(2) Influence the outcome of any specific public election (see section 4955);		rectiv.		
any voter registration drive?	,,,,		es X No	
(3) Provide a grant to an individual for travel, study, or other similar purposi	es?		es X No	
(4) Provide a grant to an organization other than a charitable, etc., organization				
509(a)(1), (2), or (3), or section 4940(d)(2)?	ion described in section		es X No	ļ ļ
	or aducational purposes or		es LAL NO	
(5) Provide for any purpose other than religious, charitable, scientific, literar	y, or educational purposes, or		es X No	
the prevention of cruelty to children or animals?		· · · · · · · · · · · · · · · · · · ·	es 🕰 nu	1
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify u		iii Regulations	37 / 3	E
section 53.4945 or in a current notice regarding disaster assistance (see inst			N/A	5b
Organizations relying on a current notice regarding disaster assistance check				, [
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption				
expenditure responsibility for the grant?		1/A L Y	es L No	, ,
If "Yes," attach the statement required by Regulations section 53.49				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	o pay premiums on			
a personal benefit contract?		Y	es 🗶 No 📗	1 1
b Did the foundation, during the year, pay premiums, directly or indirectly, on a	personal benefit contract?	-		6b X
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?	L Y	es 🗶 No 📙	
b If "Yes," did the foundation receive any proceeds or have any net income attri		<u></u>		7b
Part VIII Information About Officers, Directors, Trus Paid Employees, and Contractors	tees, Foundation Ma	anagers, Highl	у	
1 List all officers, directors, trustees, foundation managers and their	r compensation.			
	(b) Title, and average hours per week devoted	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e) Expense account, other
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	and deferred compensation	account, other allowances
ANNE F. SLICHTER	PRESIDENT			
61 CHESTNUT COURT		}	}	
CHAMPAIGN, IL 61821	0.00	0.	0.	0.
DESMOND G. FITZGERALD	VICE PRESIDEN			•
25 CARRINGTON DRIVE	AICE LEGIDER	1		
	0.00	0.	0.	0.
GREENWICH, CT 06831			<u></u>	<u> </u>
DAVID SLICHTER	TREASURER			
61 CHESTNUT COURT	0.00			•
CHAMPAIGN, IL 61821	0.00	0.	0.	0.
SARAH FITZGERALD	_SECRETARY		ļ	
25 CARRINGTON DRIVE	_			
GREENWICH, CT 06831	0.00	0.	0.	0.
2 Compensation of five highest-paid employees (other than those in		enter "NONE."	(cf) Contributions to	/ \ C
(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 deterred compensation	(e) Expense account, other allowances
NONE		,		
	7		(
		1		
	=			
	1			
	-	{	l	
The state of the s		<u></u>		
Total number of other employees paid over \$50,000				0

Form **990-PF** (2010)

FOUNDATION	52-2	09/034 Page /
Part VIII Information About Officers, Directors, Trustees, Founda Paid Employees, and Contractors (continued)	tion Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter	"NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of other recovery over PSO 000 for professional converse		▶ 0
Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statist number of organizations and other beneficiaries served, conferences convened, research papers prod		Expenses
	desi, etc.	
1N/A		
2		
3		
4		
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on I	ines 1 and 2.	Amount
1 <u>N/A</u>		
		•
		0.
2		
All other program-related investments. See instructions.		
rai outoi program relateu mvesumentsi oee msuueluuts.		
		

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Total. Add lines 1 through 3

Page 8

F	Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndations	, see instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а		1a	40,485.
b	Average of monthly cash balances	1b	11,007.
C	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	51,492.
е	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	51,492.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	772.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	50,720.
6_	Minimum investment return. Enter 5% of line 5	6	2,536.
P	Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here and do not complete this part.)	d certain	
1	Minimum investment return from Part X, line 6	1	2,536.
2a	Tax on investment income for 2010 from Part VI, line 5		
b	Income tax for 2010. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	248.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,288.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	2,288.
6	Deduction from distributable amount (see instructions)	6	0.
7_	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	2,288.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		100 000
	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	_1a	100,000.
	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	Surtability 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	100,000.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment	_	0.40
	income. Enter 1% of Part I, line 27b	5	248.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	99,752.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation q 4940(e) reduction of tax in those years.	ualifies fo	r the section

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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				2,288.
2 Undistributed income, if any, as of the end of 2010-				
a Enter amount for 2009 only			0.	
b Total for prior years:				
,,		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005				v
b From 2006		,		
e From 2007				
d From 2008 67,956.				
e From 2009 105,929.				
f Total of lines 3a through e	173,885.			
4 Qualifying distributions for 2010 from				
Part XII, line 4: ► \$ 100,000.				
a Applied to 2009, but not more than line 2a			0.	
b Applied to undistributed income of prior				
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus				
(Election required - see instructions)	0.			2,288.
d Applied to 2010 distributable amount	97,712.			4,200.
e Remaining amount distributed out of corpus	91,712.			0.
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a))	<u> </u>			
6 Enter the net total of each column as indicated below:				•
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	271,597.			· · · · · · · · · · · · · · · · · · ·
b Prior years' undistributed income. Subtract				
line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2009. Subtract line				
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2010. Subtract]	
lines 4d and 5 from line 1. This amount must				
be distributed in 2011				0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005				
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2011.				
Subtract lines 7 and 8 from line 6a	271,597.			
O Analysis of line 9:				
a Excess from 2006		1		
b Excess from 2007		l		
c Excess from 2008 67,956.				
d Excess from 2009 105, 929.		Ì		
e Excess from 2010 97,712.				- 000 DF (00 to)

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Part XIV Private Operating For			II-A, question 9)	N/A	
1 a If the foundation has received a ruling or o					
foundation, and the ruling is effective for 2	•	=	▶		
b Check box to indicate whether the foundate		g foundation described		4942(j)(3) or 4	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year	(1.1.0000	Prior 3 years	(4) 0007	(a) Tatal
income from Part I or the minimum	(a) 2010	(b) 2009	(c) 2008	(d) 2007	(e) Total
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			+		<u> </u>
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 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	,				ļ
512(a)(5)), or royalties)					
(2) Support from general public	İ				
and 5 or more exempt organizations as provided in					ĺ
section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from	ļ				
an exempt organization			 		
(4) Gross investment income	(0 - 1 - 1	- 44-1	'C 41 - C 1 - 1'	1 05 000	
Part XV Supplementary Informat any time during the			it the foundation	nau \$5,000 or m	ore in assets
		154 4040115.7		·	
 Information Regarding Foundation List any managers of the foundation who has a contract the foundation who has a contract the foundation who has a contract the foundation. 	-	nan 2% of the total con-	tributions received by the t	oundation before the clo	se of any tay
year (but only if they have contributed mor			and adding room vod by the r	oundation before the ste	oc or any abo
NONE					
b List any managers of the foundation who o other entity) of which the foundation has a			(or an equally large portion	n of the ownership of a p	artnership or
NONE	g				
2 Information Regarding Contribution	Grant Gift Loan S	Scholarship etc. Pr	rograms:		
Check here ► X If the foundation only				ot accept unsolicited requ	ests for funds. If
the foundation makes gifts, grants, etc. (se					
a The name, address, and telephone number	of the person to whom	applications should be	addressed:		
	·				
b The form in which applications should be s	submitted and information	on and materials they s	hould include:		
c Any submission deadlines:		·			
				 	
d Any restrictions or limitations on awards, s	uch as by geographical	areas, charitable fields,	kinds of institutions, or of	her factors:	

EQ.	UND	λm	т	○NT
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52-2097034

Part XV Supplementary Information	(continued)			7705 - Tuge 11
3 Grants and Contributions Paid During the Y	ear or Approved for Future	Payment		
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient	Contribution	
a Paid during the year				
	}	1	 	
	•			
	(}
	Ì			
SEE STATEMENT 11			ļ	
Total			<u>▶ 3a</u>	100,000.
h Approved for future payment			•	
NONE				
Total			▶ 3h	0

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FOUNDATION

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Part XVI-A	Analysis of	Income-Producing	Activities
------------	-------------	------------------	------------

ter gross amounts unless otherwise indicated.	Unrelated b	Unrelated business income		y section 512, 513, or 514	(e)	
	(a) Business	(b) Amount	(C) Exclu- sion	(d) Amount	Related or exempt function income	
Program service revenue:	code	Allount	code	Altiount	Interior records	
a	_					
b	_					
G	-		 			
d	_					
e	- 		 -	····		
g Fees and contracts from government agencies	-					
Membership dues and assessments						
Interest on savings and temporary cash				-		
investments			14	178.		
Dividends and interest from securities			24	178. 2,696.		
Net rental income or (loss) from real estate:						
a Debt-financed property						
b Not debt-financed property						
Net rental income or (loss) from personal						
property				_		
Other investment income						
Gain or (loss) from sales of assets other						
than inventory			18	26,842.		
Net income or (loss) from special events						
Gross profit or (loss) from sales of inventory						
Other revenue:						
a						
b						
c	_					
d	_				·- · · · · · · · · · · · · · · · · · ·	
e	_					
Subtotal. Add columns (b), (d), and (e)).	29,716.	00 710	
Total. Add line 12, columns (b), (d), and (e)			•	13	29,716	
e worksheet in line 13 instructions to verify calculations.	.)		···			
art XVI-B Relationship of Activities	s to the Accom	plishment of	Exempt Pu	ırposes		
						
ne No. Explain below how each activity for which in the foundation's exempt purposes (other the				importantly to the accomp	lishment of	
The foundation a exempt purposes (other th	ian by providing luttus	ioi sucii purposes).	·			
						

ine No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).
Í	
$\overline{}$	

Form 99	THE WILLIAM FOUNDATION	H.G. FI	TZGERALD FAMI		2097034	Pa	ge 13
Part		ransfers To	and Transactions a	and Relationships With Nor			90 10
1 Did	d the organization directly or indirectly engage in	any of the follow	unn with any other organization	on described in section 501(c) of		Yes	No
	e Code (other than section 501(c)(3) organization						
	ansfers from the reporting foundation to a none	· -				ĺ	
) Cash		J		1a(1)		X
	Other assets				1a(2)		X
٠,	her transactions:						
(1)) Sales of assets to a noncharitable exempt org	anization			1b(1)		X
(2)	Purchases of assets from a noncharitable exe	mpt organization		_	1b(2)		X
(3)	Rental of facilities, equipment, or other assets				1b(3)		X
(4)	Reimbursement arrangements		-		1b(4)		X
(5)	Loans or loan guarantees .		••		1b(5)		X
(6)	Performance of services or membership or fu	ndraising solicitat	tions		1b(6)		<u>X</u>
	aring of facilities, equipment, mailing lists, other				1c	i	X
	he answer to any of the above is "Yes," complete		• •			ets,	
	services given by the reporting foundation. If th			ue in any transaction or sharing arranger	nent, show in		
	lumn (d) the value of the goods, other assets, or			(4)			
(a) Line n	no (b) Amount involved (c) Nai		ole exempt organization	(d) Description of transfers, transaction	is, and sharing arr	angemer	nts
	 	N/A					
							
	+						
					 -		
					~~~		
		****					
		<del></del>					
		<del></del>		<u> </u>	<del> </del>		
	the foundation directly or indirectly affiliated with	•		zations described		X	1
	section 501(c) of the Code (other than section 5	01(c)(3)) or in sec	CTION 52/7		Yes	لـــــــــــــــــــــــــــــــــــــ	] NO
U 11 1	Yes, complete the following schedule.  (a) Name of organization		(b) Type of organization	(c) Description of rela	ationship		
	N/A		(2) type of diguization	(6) 2000			
	24/22						
Sign	Under penalties of perjury, I declare that I have examinand complete. Declaration of preparer (other than tax)				and belief, it is tru	e, correc	t,
Here	mondomisen	eld	8.8.11	V,P.			
	Signature of officer or trustee	- <del> </del>	Date	Title			
	Print/Type preparer's name	Preparer's	signature	Date Check If F	PTIN		

(301) 762-7755 Form **990-PF** (2010)

self- employed

Firm's EIN ▶

Phone no.

Paid Preparer

**Use Only** 

Firm's name ► ROSENBLOOM &

Firm's address ► 1455 RESEARCH BLVD., SUITE 510 ROCKVILLE, MD 20850

FORM 990-PF INTER	REST ON SAVINGS A	AND TEMPORARY C	ASH INVESTMENTS	STATEMENT 1
SOURCE				AMOUNT
BANK OF AMERICA - BANK OF AMERICA - BANK OF AMERICA -	BROKERAGE			8. 169. 1.
TOTAL TO FORM 990-	-PF, PART I, LINE	3, COLUMN A		178.
FORM 990-PF	DIVIDENDS AND	INTEREST FROM	SECURITIES	STATEMENT 2
SOURCE		GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
BANK OF AMERICA - BANK OF AMERICA -		3,048.		2,652. 44.
TOTAL TO FM 990-PF	, PART I, LN 4	3,092.	396.	2,696.

FORM 990-PF GAIL	N OR (LOSS)	FRO	M SALE	OF	ASSETS		STA'	PEMENT	
(A) DESCRIPTION OF PROPERTY					MANNER ACQUIRED		ATE JIRED	DATE S	SOLD
BANK OF AMERICA 53-200260304956					PURCHASED	VAR	ious	VARIO	ວບຣ
(B) GROSS	(C) COST OR	E	(D) XPENSE	OF	(E)			(F)	
	THER BASIS		SALE		DEPREC.	•	GAIN	OR LOS	SS
58,877.	32,620.	·		0.		0.		26,2	257.
(A) DESCRIPTION OF PROPERTY					MANNER ACQUIRED		ATE JIRED	DATE S	SOLD
CLASS ACTION SETTLEMENT					PURCHASED				
(B)	(C)		(D)		(E)			(F)	
GROSS SALES PRICE OT	COST OR THER BASIS	E	XPENSE SALE	OF	DEPREC.	•	GAIN	OR LOS	SS
189.	0.			0.		0.		1	89.
NET GAIN OR LOSS FROM SALE	OF ASSETS							26,4	146.
CAPITAL GAINS DIVIDENDS FE	ROM PART IV					_		3	96.
TOTAL TO FORM 990-PF, PART	r I, LINE 6A					=		26,8	42.
FORM 990-PF	ACCOU	NTI	NG FEES	<del></del>	-	<del></del>	STAT	EMENT	4
DESCRIPTION	(A) EXPENSE PER BOO		( E NET IN MENT I	IVES		ISTEI		(D) CHARITA PURPOS	
ACCOUNTING FEES	1,8	75.		1,8	75.				0.
TO FORM 990-PF, PG 1, LN 1	.6B 1,8	75.		1,8	75.	<del></del>			0.

FORM 990-PF	OTHER PROFES	SIONAL F	EES	<u> </u>	STATEMENT	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INV MENT IN	EST-	(C) ADJUSTEI NET INCOM		
AGENCY FEES OFFICE EXPENSE	2,411. 426.		,411. 426.			0.
TO FORM 990-PF, PG 1, LN 16C	2,837.	2	,837.			0.
FORM 990-PF	TAX	ES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INV MENT IN	EST-	(C) ADJUSTEI NET INCOM		
FEDERAL TAX	248.		0.			0.
TO FORM 990-PF, PG 1, LN 18 =	248.		0.			0.
FORM 990-PF	OTHER F	UNDS			STATEMENT	7
DESCRIPTION			BEGI	(A) NNING OF YEAR	(B) END OF YEAR	
ENDOWMENT FUND				,089,454.	2,014,27	71.
TOTAL TO FORM 990-PF, PART II	, LINE 29		2	,089,454.	2,014,27	
	, LINE 29	E STOCK	2	,089,454.	2,014,27	
TOTAL TO FORM 990-PF, PART II  FORM 990-PF  DESCRIPTION		E STOCK		K VALUE		71.
FORM 990-PF		E STOCK			STATEMENT FAIR MARKET	71.

FORM 990-PF O	THER INVESTMENTS		STATEMENT 9
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
HOLYOKE PARTNERSHIP MUTUAL FUND	COST	2,000,000.	2,779,568. 2,170.
TOTAL TO FORM 990-PF, PART II, L	INE 13	2,001,867.	2,781,738.
TODAL OOD DE			
FORM 990-PF	OTHER ASSETS		STATEMENT 10
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
PREPAID FEDERAL TAXES	480.	263.	263.
TO FORM 990-PF, PART II, LINE 15	480.	263.	263.

	AND CONTRIBUTIONS DURING THE YEAR	STAT	EMENT 11
RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
ROCKEFELLER UNIVERSITY 1230 YORK AVENUE NEW YORK, NY 10021	SUPPORT		25,000.
ASHOKA: INNOVATORS FOR THE PUBLIC 1700 NORTH MOORE STREET, SUITE 2000 ARLINGTON, VA 22209	SUPPORT		5,000.
CHAMPAIGN COUNTY HEALTH CARE CONSUMERS 44 MAIN ST. SUITE 208 CHAMPAIGN, IL 61820	SUPPORT		2,000.
CITIZEN'S ACADEMY 1827 ANSEL ROAD CLEVELAND, OH 44106	SUPPORT		1,500.
CONSERVATION INTERNATIONAL 2011 CRYSTAL DRIVE, SUITE 500 ARLINGTON, VA 22202	SUPPORT		5,000.
CRISIS NURSERY 1309 WEST HILL STREET URBANA, IL 61801	SUPPORT		1,500.
DOCTORS WITHOUT BORDERS 333 SEVENTH AVENUE, 2ND FLOOR NEW YORK, NY 10001	SUPPORT		5,000.
HOPE FOR POOR CHILDREN FOUNDATION 25 CARRINGTON DRIVE GREENWICH, MA 06831	SUPPORT		25,000.

THE WILLIAM H.G. FITZGERALD FAMILY FOUND	52-2097034
NATURAL RESOURCES DEFENCE COUNCIL SUPPORT 40 W 20TH ST NEW YORK, NY 10011	5,000.
PLANNED PARENTHOOD OF ILLINOIS 18 SOUTH MICHIGAN AVE 6TH FL SUPPORT CHICAGO, IL 60603	3,000.
THE EPIPHANY SCHOOL 154 CENTRE STREET DOCHESTER, MA SUPPORT 02124	5,000.
UIF/ FRIENDS OF WILL 300 NORTH GOODWIN AVENUE SUPPORT URBANA, IL 61801	5,000.
UIF/KRANNERT CENTER FOR THE PERFORMING ARTS SUPPORT 500 SOUTH GOODWIN AVENUE URBANA, IL 61801	10,000.
UNIVERSITY LABORATORY HIGH SCHOOL/UIF HARKER HALL, MC-386 1305 WEST GREEN STREET URBANA, IL 61801	2,000.
TOTAL TO FORM 990-PF, PART XV, LINE 3A	100,000.