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

2011

Department of the Treasury  
Internal Revenue Service

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

For calendar year 2011, or tax year beginning

, 2011, and ending

Name of foundation

**JEAN THOMAS LAMBERT FOUNDATION**

Number and street (or P O box number if mail is not delivered to street address)

**c/o Patrick J. Weschler, 3800 Embassy Parkway**Room/suite  
**300**

City or town

**Akron**State ZIP code  
**OH 44333**

G Check all that apply:

 Initial return Final return Address change Initial Return of a former public charity Amended return Name changeH Check type of organization.  Section 501(c)(3) exempt private foundation Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundationI Fair market value of all assets at end of year  
(from Part II, column (c), line 16)J Accounting method:  Cash  Accrual Other (specify) **► \$ 2,051,841.**

(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 instructions))

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>REVENUE</b>	1 Contributions, gifts, grants, etc, received (att sch)	400,100.			
	2 Ck <input type="checkbox"/> if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments	72.	72.		
	4 Dividends and interest from securities	79,908.	79,908.		
	5a Gross rents				
	b Net rental income or (loss)	**	L-6a Stmt		
	6a Net gain/(loss) from sale of assets not on line 10	9,536.			
	b Gross sales price for all assets on line 6a	1,234,600.			
	7 Capital gain net income (from Part IV, line 2)		9,536.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit/(loss) (att sch)					
11 Other income (attach schedule)					
See attached	178.	178.			
12 Total. Add lines 1 through 11	489,794.	89,694.	N/A		
<b>ADMINISTRATIVE EXPENSES</b> <b>OPERATING EXPENSES</b>	13 Compensation of officers, directors, trustees, etc	31,053.	750.		30,303.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	3,293.			1,513.
	b Accounting fees (attach sch)				
	c Other pro fees (attach sch)				
	17 Interest	18,028.	18,028.		
	18 <small>Interest (attach schedule) (See insrs) See Line 18 Stmt</small>	1,628.	218.		
	19 Depreciation (attach sch) and depletion				
	20 Occupancy	.5,450.	132.		5,318.
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	See attached	6,571.	73.		6,497.
24 Total operating and administrative expenses. Add lines 13 through 23	66,023.	19,201.	N/A	43,631.	
25 Contributions, gifts, grants paid	236,000.			236,000.	
26 Total expenses and disbursements. Add lines 24 and 25	302,023.	19,201.	N/A	279,631.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	187,771.				
b Net investment income (if negative, enter -0-)		70,493.			
c Adjusted net income (if negative, enter -0-)			N/A		

2017  
AND  
EXPENSES
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**OGDEN, UT**

<b>Part II</b> <b>Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)	<b>Beginning of year</b>	<b>End of year</b>	
			<b>(a) Book Value</b>	<b>(b) Book Value</b>	<b>(c) Fair Market Value</b>
<b>ASSETS</b>	1	92,397.	326,149.	326,149.	
	2 Savings and temporary cash investments				
	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 instructions)				
	7 Other notes and loans receivable (attach sch)				
	Less allowance for doubtful accounts				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges				
	10a Investments – U.S. and state government obligations (attach schedule)				
	b Investments – corporate stock (attach schedule)				
	c Investments – corporate bonds (attach schedule)				
	11 Investments – land, buildings, and equipment: basis				
Less accumulated depreciation (attach schedule)					
12 Investments – mortgage loans					
13 Investments – other (attach schedule)	1,751,113.	1,705,391.	1,725,692.		
14 Land, buildings, and equipment: basis					
Less accumulated depreciation (attach schedule)					
15 Other assets (describe)					
16 <b>Total assets</b> (to be completed by all filers – see the instructions. Also, see page 1, item I)	1,843,510.	2,031,540.	2,051,841.		
<b>LIABILITIES</b>	17 Accounts payable and accrued expenses	521.	780.		
	18 Grants payable				
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, & other disqualified persons				
	21 Mortgages and other notes payable (attach schedule)				
	22 Other liabilities (describe)				
	23 <b>Total liabilities</b> (add lines 17 through 22)	521.	780.		
		<b>Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.</b>			
	<b>NET ASSETS</b>	24 Unrestricted			
		25 Temporarily restricted			
		26 Permanently restricted			
			<b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.</b>		
		27 Capital stock, trust principal, or current funds			
		28 Paid-in or capital surplus, or land, building, and equipment fund			
		29 Retained earnings, accumulated income, endowment, or other funds			
		30 <b>Total net assets or fund balances</b> (see instructions)	1,842,989.	2,030,760.	
31 <b>Total liabilities and net assets/fund balances</b> (see instructions)		1,842,989.	2,030,760.		
		1,843,510.	2,031,540.		

**Part III** **Analysis of Changes in Net Assets or Fund Balances**

1 Total net assets or fund balances at beginning of year – Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,842,989.
2 Enter amount from Part I, line 27a	2	187,771.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	2,030,760.
5 Decreases not included in line 2 (itemize)	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	2,030,760.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shares MLC Company)			(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a See attached statement			P	various	various
b					
c					
d					
e					
(e) Gross sales price		(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a	1,234,600.		1,225,064.	9,536.	
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69					
(i) Fair Market Value as of 12/31/69		(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h)) gain minus column (k), but not less than -0- or Losses (from column (h))	
a	0.	0.	0.	9,536.	
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	9,536.
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 instructions) If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2010	204,308.	1,612,349.	0.126715
2009	269,754.	1,247,204.	0.216287
2008	242,927.	1,220,150.	0.199096
2007	188,050.	1,145,088.	0.164223
2006	231,483.	841,360.	0.275130

2 Total of line 1, column (d)	2	0.981451
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	0.196290
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	1,942,393.
5 Multiply line 4 by line 3	5	381,272.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	705.
7 Add lines 5 and 6	7	381,977.
8 Enter qualifying distributions from Part XII, line 4	8	279,631.

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

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

1 a Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/> and enter 'N/A' on line 1	
Date of ruling or determination letter _____ (attach copy of letter if necessary – see instrs)	
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► <input type="checkbox"/> and enter 1% of Part I, line 27b	1 1,410.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)	
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) .....	2 0.
3 Add lines 1 and 2 .....	3 1,410.
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 1,410.
6 Credits/Payments:	
a 2011 estimated tax pmts and 2010 overpayment credited to 2011	6a 630.
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 .....	7 630.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed .....	9 780.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid .....	10 0.
11 Enter the amount of line 10 to be: Credited to 2012 estimated tax ► 0.   Refunded ► 11	11

**Part VII-A Statements Regarding Activities**

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? .....

	Yes	No
1a	X	

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? .....

	X
--	---

If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

c Did the foundation file Form 1120-POL for this year? .....

1c	X
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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 .....

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	X
---	---

3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes

3	X
---	---

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? .....

4a	X
----	---

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?

5	X
---	---

If 'Yes,' attach the statement required by General Instruction T.

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	X
---	---

7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV

7	X
---	---

8a Enter the states to which the foundation reports or with which it is registered (see instructions) ►

OH – Ohio

8a	
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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	X
----	---

9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If 'Yes,' complete Part XIV

9	X
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10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses .....

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

11		X
12		X
13	X	
Website address ► N/A		
14	Telephone no. ► (330) 376-5300	
Located at ► 3800 Embassy Parkway, Suite 300 Akron OH ZIP + 4 ► 44333		
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	
16	Yes	No
At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See 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**

	Yes	No
<b>1a</b> During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? . . . . .	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . .	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? . . . . .	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? . . . . .	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? . . . . .	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) . . . . .	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<b>b</b> If any answer is 'Yes' to 1a(1)-(6), did <b>any</b> 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 instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>		
<b>c</b> 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 2011? . . . . .		
<b>2</b> 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))		
<b>a</b> At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? . . . . .	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If 'Yes,' list the years ► 20__ , 20__ , 20__ , 20__ .		
<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement – see instructions.) . . . . .		
<b>c</b> If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. ► 20__ , 20__ , 20__ , 20__ .		
<b>3a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . .	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<b>b</b> If 'Yes,' did it have excess business holdings in 2011 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 2011.) . . . . .		
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . .		
<b>b</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 2011? . . . . .		

**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))? .....

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? .....

(3) Provide a grant to an individual for travel, study, or other similar purposes? .....

(4) Provide a grant to an organization other than a charitable, etc, organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) .....

(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

Yes  No

Yes  No

Yes  No

Yes  No

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

5b X

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

6b X

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

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

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

7b N/A

**b** If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction? .....**Part VIII | Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

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

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

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

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

►

None

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

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

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc		Expenses
1	NONE	-----
2	-----	0.
3	-----	-----
4	-----	-----

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.		Amount
1	NONE	-----
2	-----	0.
3	-----	-----
<b>Total.</b> Add lines 1 through 3	.....	None

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes		
a Average monthly fair market value of securities	1a	1,839,095.
b Average of monthly cash balances	1b	132,878.
c Fair market value of all other assets (see instructions)	1c	0.
d <b>Total</b> (add lines 1a, b, and c)	1d	1,971,973.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2 Acquisition indebtedness applicable to line 1 assets	2	
3 Subtract line 2 from line 1d	3	1,971,973.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	29,580.
5 <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,942,393.
6 <b>Minimum investment return.</b> Enter 5% of line 5	6	97,120.

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

1 Minimum investment return from Part X, line 6	1	97,120.
2a Tax on investment income for 2011 from Part VI, line 5	2a	1,410.
b Income tax for 2011 (This does not include the tax from Part VI.)	2b	
c Add lines 2a and 2b	2c	1,410.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	95,710.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	95,710.
6 Deduction from distributable amount (see instructions)	6	
7 <b>Distributable amount</b> as adjusted. Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	95,710.

**Part XII Qualifying Distributions** (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes:		
a Expenses, contributions, gifts, etc – total from Part I, column (d), line 26	1a	279,631.
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 <b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	279,631.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	0.
6 <b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	279,631.

**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 instructions)**

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				95,710.
2 Undistributed income, if any, as of the end of 2011			0.	
a Enter amount for 2010 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2011				
a From 2006 190,122.				
b From 2007 132,514.				
c From 2008 182,336.				
d From 2009 207,707.				
e From 2010 124,319.				
f Total of lines 3a through e 836,998.				
4 Qualifying distributions for 2011 from Part XII, line 4 ► \$ 279,631.				
a Applied to 2010, but not more than line 2a 0.				
b Applied to undistributed income of prior years (Election required – see instructions) 0.				
c Treated as distributions out of corpus (Election required – see instructions) 0.				
d Applied to 2011 distributable amount 0.				
e Remaining amount distributed out of corpus 183,921.				
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a)) 0.				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5 1,020,919.				
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 2010 Subtract line 4a from line 2a. Taxable amount – see instructions 0.				
f Undistributed income for 2011 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2012 0.				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions) 0.				
8 Excess distributions carryover from 2006 not applied on line 5 or line 7 (see instructions) 190,122.				
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a 830,797.				
10 Analysis of line 9:				
a Excess from 2007 132,514.				
b Excess from 2008 182,336.				
c Excess from 2009 207,707.				
d Excess from 2010 124,319.				
e Excess from 2011 183,921.				

BAA

Form 990-PF (2011)

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

N/A

**Part XV** Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year — see instructions.)

## 1 Information Regarding Foundation Managers:

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

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.  
NONE

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

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

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

See Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc. Programs.

See attached

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

See attached

### **c Any submission deadlines:**

See attached

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

See attached

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

Recipient	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
Name and address (home or business)				
<b>a Paid during the year</b> See attached schedule				236,000.
<b>Total</b>			► 3a	236,000.
<b>b Approved for future payment</b> None				0.
<b>Total</b>			► 3b	0.
<b>BAA</b>	TEEA0501	07/14/11		Form 990-PF (2011)

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

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
<b>1</b> Program service revenue						
a						
b						
c						
d						
e						
f						
<b>g</b> Fees and contracts from government agencies						
<b>2</b> Membership dues and assessments						
<b>3</b> Interest on savings and temporary cash investments				14	72.	
<b>4</b> Dividends and interest from securities				14	79,908.	
<b>5</b> Net rental income or (loss) from real estate						
a Debt-financed property						
b Not debt-financed property						
<b>6</b> Net rental income or (loss) from personal property						.
<b>7</b> Other investment income						
<b>8</b> Gain or (loss) from sales of assets other than inventory				18	9,536.	
<b>9</b> Net income or (loss) from special events						
<b>10</b> Gross profit or (loss) from sales of inventory						
<b>11</b> Other revenue						
a see attachment				14	178.	
b						
c						
d						
e						
<b>12</b> Subtotal Add columns (b), (d), and (e)					89,694.	
<b>13</b> Total Add line 12, columns (b), (d), and (e)				....	13	89,694.

(See worksheet in line 13 instructions 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 foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)
N/A	

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

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
- (2) Other assets

**b Other transactions:**

- (1) Sales of assets to a noncharitable exempt organization
- (2) Purchases of assets from a noncharitable exempt organization
- (3) Rental of facilities, equipment, or other assets
- (4) Reimbursement arrangements
- (5) Loans or loan guarantees .
- (6) Performance of services or membership or fundraising solicitation

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees

	Yes	No
1 a (1)		X
1 a (2)		X
1 b (1)		X
1 b (2)		X
1 b (3)		X
1 b (4)		X
1 b (5)		X
1 b (6)		X
1 c		X

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

**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

<b>(a) Name of organization</b>	<b>(b) Type of organization</b>	<b>(c) Description of relationship</b>

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) is based on all information of which preparer has any knowledge.

**Sign  
Here**

I, Nancy K. Reymann, declare under penalty of perjury that the foregoing is true and correct to the best of my knowledge and belief.

15/01/12

► President

May the IRS discuss this return with the preparer shown below (see instructions)?

---

Signature of officer or trustee

---

Dat

---

**Title**

<b>Paid Preparer Use Only</b>	Print/Type preparer's name <b>Anita Szegvari</b>	Preparer's signature <i>Anita Szegvari CAA</i>	Date <b>05/10/12</b>	Check <input checked="" type="checkbox"/> if self-employed	PTIN <b>P00581048</b>
	Firm's name ► <b>BUCKINGHAM, DOOLITTLE &amp; BURROUGHS</b>			Firm's EIN ► <b>26-1965107</b>	
	Firm's address ► <b>3800 EMBASSY PKWY STE 300</b>			Phone no <b>(330) 643-0238</b>	
	<b>AKRON</b>	<b>OH</b>	<b>44333-8398</b>		

**BAA**

**Form 990-PF (2011)**

**Schedule B**  
(Form 990, 990-EZ,  
or 990-PF)

Department of the Treasury  
Internal Revenue Service

OMB No 1545-0047

**Schedule of Contributors**

► Attach to Form 990, Form 990-EZ, or Form 990-PF

**2011**

**Name of the organization**

JEAN THOMAS LAMBERT FOUNDATION

**Employer identification number**

34-1897221

**Organization type (check one)**

**Filers of:**

Form 990 or 990-EZ

**Section:**

501(c)( \_\_\_\_ ) (enter number) organization  
 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation  
 527 political organization

Form 990-PF

501(c)(3) exempt private foundation  
 4947(a)(1) nonexempt charitable trust treated as a private foundation  
 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**

**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. (Complete Parts I and II.)

**Special Rules**

For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use **exclusively** for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use **exclusively** for religious, charitable, etc, purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an **exclusively** religious, charitable, etc, purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc, contributions of \$5,000 or more during the year . . . . . ► \$ \_\_\_\_\_

**Caution:** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF) but it **must** answer 'No' on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on Part I, line 2, of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

**BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990,  
990EZ, or 990-PF.**

Schedule B (Form 990, 990-EZ, or 990-PF) (2011)

Name of organization

JEAN THOMAS LAMBERT FOUNDATION

Employer identification number

34-1897221

**Part I** **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	JEAN THOMAS LAMBERT CLAT, EIN: 31-6630147 C/O PATRICK J. WESCHLER, 3800 EMBASSY PKWY, #300 AKRON OH 44333	\$ 400,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

JEAN THOMAS LAMBERT FOUNDATION  
EIN: 34-1897221  
2011 FORM 990-PF

**PART I - ANALYSIS OF REVENUE AND EXPENSES**

	(a) Revenue and expenses per <u>books</u>	(b) Net investment <u>income</u>	(c) Adjusted <u>net income</u>	(d) Disburse for charitable <u>purposes</u>
<b>Line 1 Contributions, gifts, grants, etc. received</b>				
(1) Jean Thomas Lambert CLAT, EIN: 31-6630147 (See Sch. B, Part 1, Item 1)	400,000	<u>100</u>		
(2) Margo Lane		400,100		
<b>Line 3 Interest on savings and temporary cash investments</b>				
Raymond James (agent)	72	72		
<b>Line 4 Dividends and interest from securities</b>				
Raymond James (agent) - interest and dividends	79,908	79,908		
<b>Line 11 Other income</b>				
(1) JP Morgan - class action settlement (2) Raymond James - partial sales expense reimbursements	98	<u>80</u>	98 80 <u>178</u>	

JEAN THOMAS LAMBERT FOUNDATION  
EIN: 34-1897221  
2011 FORM 990-PF

**PART I - ANALYSIS OF REVENUE AND EXPENSES**

	(a) Revenue and expenses per <u>books</u>	(b) Net investment income	(c) Adjusted <u>net income</u>	(d) Disburse for charitable <u>purposes</u>
<b><u>Line 13 Compensation of officers, directors, trustees, etc.</u></b>				
Nancy Reymann - wages	31,053	750	30,303	
<b><u>Line 16 a) Legal fees</u></b>				
Conferences with trustees re: grants and foundation meetings; review of grant requests, preparation of documents and grant information for board meetings; preparation of Form 990-PF; manage checkbook.	3,293		1,513	
<b><u>Line 16 c) Other professional fees</u></b>				
Raymond James - Investment management fees		18,028	18,028	
<b><u>Line 18 Taxes</u></b>				
Foreign dividend taxes	218	218		
2010 net investment income tax			1,410	1,628

JEAN THOMAS LAMBERT FOUNDATION  
EIN: 34-1897221  
2011 FORM 990-PF

**PART I - ANALYSIS OF REVENUE AND EXPENSES**

	(a) Revenue and expenses per <u>books</u>	(b) Net <u>investment income</u>	(c) Adjusted <u>net income</u>	(d) Disburse. for charitable <u>purposes</u>
<b><u>Line 20 Occupancy</u></b>				
Buckingham, Doolittle & Burroughs - rental of office space	4,950	120		4,830
McKee Botanical - two months rental of office space	<u>500</u>	<u>12</u>		<u>488</u>
	5,450	132		5,318
<b><u>Line 23 Other expenses</u></b>				
Paychex - payroll administration expenses	1,801			1,801
Ohio AG filing fee	200			200
Council of Foundations - 2011 membership dues	500			500
Ohio Grantmakers Forum - 2011 membership fee	525			525
Verizon Wireless - telephone service	722			704
Ohio Bureau of Workers Comp. - account fee	110			110
The Cincinnati Insurance Co. - business owners policy	25		1	24
American Insurance - business owners policy	375			375
Ohio Statement of Continued Existence filing fee	25			25
Office supplies including toner cartridge, printer, ink, postage, express mail charges and supplies	<u>2,288</u>	<u>55</u>		<u>2,233</u>
	6,571	73		6,497

Name JEAN THOMAS LAMBERT FOUNDATION	Employer Identification Number 34-1897221
<b>Asset Information:</b>	
Description of Property: . . . <u>SHORT TERM SALES (SEE ATTACHED GREENPORT STATEMENT)</u>	
Date Acquired: <u>Various</u>	How Acquired: <u>Purchased</u>
Date Sold: <u>Various</u>	Name of Buyer: . . .
Sales Price: <u>156,466.</u>	Cost or other basis (do not reduce by depreciation) . . . <u>175,807.</u>
Sales Expense: . . .	Valuation Method: . . .
Total Gain (Loss): <u>-19,341.</u>	Accumulation Depreciation: . . .
Description of Property: . . . <u>LONG TERM SALES (SEE ATTACHED GREENPORT STATEMENT)</u>	
Date Acquired <u>Various</u>	How Acquired: . . . <u>Purchased</u>
Date Sold: <u>Various</u>	Name of Buyer: . . .
Sales Price: <u>1,072,074.</u>	Cost or other basis (do not reduce by depreciation) . . . <u>1,038,179.</u>
Sales Expense: . . .	Valuation Method: . . .
Total Gain (Loss): <u>33,895.</u>	Accumulation Depreciation: . . .
Description of Property: <u>GINNIE MAE POOL 647986</u>	
Date Acquired: <u>Various</u>	How Acquired: <u>Purchased</u>
Date Sold: <u>Various</u>	Name of Buyer: . . .
Sales Price: <u>6,060.</u>	Cost or other basis (do not reduce by depreciation) . . . <u>11,078.</u>
Sales Expense: . . .	Valuation Method: . . .
Total Gain (Loss): <u>-5,018.</u>	Accumulation Depreciation: . . .
Description of Property: . . .	
Date Acquired: . . .	How Acquired: . . .
Date Sold: . . .	Name of Buyer: . . .
Sales Price: . . .	Cost or other basis (do not reduce by depreciation) . . .
Sales Expense: . . .	Valuation Method: . . .
Total Gain (Loss): . . .	Accumulation Depreciation: . . .
Description of Property: . . .	
Date Acquired: . . .	How Acquired: . . .
Date Sold: . . .	Name of Buyer: . . .
Sales Price: . . .	Cost or other basis (do not reduce by depreciation) . . .
Sales Expense: . . .	Valuation Method: . . .
Total Gain (Loss): . . .	Accumulation Depreciation: . . .
Description of Property: . . .	
Date Acquired: . . .	How Acquired: . . .
Date Sold: . . .	Name of Buyer: . . .
Sales Price: . . .	Cost or other basis (do not reduce by depreciation) . . .
Sales Expense: . . .	Valuation Method: . . .
Total Gain (Loss): . . .	Accumulation Depreciation: . . .
Description of Property: . . .	
Date Acquired: . . .	How Acquired: . . .
Date Sold: . . .	Name of Buyer: . . .
Sales Price: . . .	Cost or other basis (do not reduce by depreciation) . . .
Sales Expense: . . .	Valuation Method: . . .
Total Gain (Loss): . . .	Accumulation Depreciation: . . .
Description of Property: . . .	
Date Acquired: . . .	How Acquired: . . .
Date Sold: . . .	Name of Buyer: . . .
Sales Price: . . .	Cost or other basis (do not reduce by depreciation) . . .
Sales Expense: . . .	Valuation Method: . . .
Total Gain (Loss): . . .	Accumulation Depreciation: . . .

## Proceeds from Broker and Barter Exchange Transactions

2011

## 8 - SHORT-TERM GAINS AND LOSSES - Cost basis is NOT reported to the IRS

Report on Form 8949, Part I, with Box B checked

6 - Tax lots: NONCOVERED\*\*

9 - Description / CUSIP/ Symbol		1a - Date of Sale or exchange	Quantity	2 - Proceeds of stocks, bonds, etc.	Date of acquisition	Cost of other basis	These columns are not reported to the IRS.	6 - Tax lots: NONCOVERED**
DODGE & COX INTERNATIONAL STOC / CUSIP: 256206103								
2 tax lots for 09/26/11. Total proceeds (and cost when required) reported to the IRS.								
93.047	2,669.23		VARIOUS	3,291.08		-621.85	Sale	
1,417.060	40,651.08		12/14/10	51,019.95		-10,368.87	Sale	
1,510.107	43,320.31		VARIOUS	54,311.03		-10,990.72	Total of 2 lots	
DODGE & COX STOCK FUND N/L / CUSIP: 256219106								
2 tax lots for 09/26/11. Total proceeds (and cost when required) reported to the IRS.								
11.749	1,112.13		VARIOUS	1,262.77		-150.64	Sale	
149.561	14,157.02		12/14/10	16,019.95		-1,862.93	Sale	
161.310	15,269.15		VARIOUS	17,282.72		-2,013.57	Total of 2 lots	
EAGLE CAPITAL APPRECIATION FUN / CUSIP: 26945A100								
09/26/11	1,007.557		25,743.08	12/14/10		28,019.95	-2,276.87	Sale
EAGLE MID CAP STOCK FUND CLASS / CUSIP: 269858866								
09/26/11	293.578		6,899.08	12/14/10		8,019.95	-1,120.87	Sale
KEELEY SMALL CAP VALUE FUND CL / CUSIP: 487300501								
09/26/11	122.449		2,562.86	12/14/10		3,000.00	-437.14	Sale
RYDEX SGI MANAGED FUTURES / CUSIP: 78356A491								
09/26/11	1,185.302		28,873.96	12/14/10		30,000.00	-1,126.04	Sale
THIRD AVENUE REAL ESTATE VALUE / CUSIP: 884116401								
2 tax lots for 09/26/11. Total proceeds (and cost when required) reported to the IRS.								
148.621	2,894.36		VARIOUS	3,384.10		-489.74	Sale	
423.729	8,252.03		12/14/10	10,019.95		-1,767.92	Sale	
572.350	11,146.39		VARIOUS	13,404.05		-2,257.66	Total of 2 lots	
VANGUARD TOTAL BOND MARKET / CUSIP: 921937108								
2 tax lots for 09/26/11. Total proceeds (and cost when required) reported to the IRS								
587 487	6,479.28		VARIOUS	6,288 26		191.02	Sale	



## Proceeds from Broker and Barter Exchange Transactions

(continued)

## 8 - SHORT-TERM GAINS AND LOSSES - Cost basis is NOT reported to the IRS

Report on Form 8949, Part I, with Box B checked

## 9 - Description / CUSIP/ Symbol

1a - Date of Sale or exchange	Quantity	2 - Proceeds of stocks, bonds, etc.	Date of acquisition	These columns are not reported to the IRS		
1a - Date of Sale or exchange	Quantity	2 - Proceeds of stocks, bonds, etc.	Date of acquisition	Cost or other basis	Gain or loss	Additional Information
VANGUARD TOTAL BOND MARKET / CUSIP: 9221937108 (Cont'd)						
09/26/11 1,324.503	14,607.69	12/14/10	14,019.95	587.74	Sale	
09/26/11 1,911.990	21,086.97	VARIOUS	20,308.21	778.76	Total of 2 lots	
VANGUARD INFLATION PROTECTED / CUSIP: 9222031869						
09/26/11 110.959	1,563.83	VARIOUS	1,460.80	103.03	Sale	
<b>Total:</b>	<b>156,465.63</b>		<b>175,806.71</b>	<b>-19,341.08</b>		

## 8 - LONG-TERM GAINS AND LOSSES - Cost basis is NOT reported to the IRS

Report on Form 8949, Part II, with Box B checked

## 9 - Description / CUSIP/ Symbol

1a - Date of Sale or exchange	Quantity	2 - Proceeds of stocks, bonds, etc.	Date of acquisition	These columns are not reported to the IRS		
1a - Date of Sale or exchange	Quantity	2 - Proceeds of stocks, bonds, etc.	Date of acquisition	Cost or other basis	Gain or loss	Additional Information
CAPITAL ONE BANK USA NA / CUSIP: 14041AW14						
09/28/11 70,000.000	76,725.35	01/07/08	70,000.00	6,725.35	Sale	
DODGE & COX INTERNATIONAL STOC / CUSIP: 2562206103						
02/24/11 276.549	9,980.05	08/17/05	9,082.98	897.07	Sale	
7 tax lots for 09/26/11. Total proceeds (and cost when required) reported to the IRS.						
756.143	21,691.41	VARIOUS	24,707.59	-3,016.18	Sale	
293.983	8,433.47	08/17/05	9,655.58	-1,222.11	Sale	
810.885	23,261.79	01/23/06	29,535.00	-6,273.21	Sale	
641.319	18,397.46	12/29/06	28,014.95	-9,617.49	Sale	
429.711	12,327.08	12/26/07	21,014.95	-8,687.87	Sale	
1,687.764	48,416.74	03/18/09	32,019.95	16,396.79	Sale	
335.233	9,616.80	08/24/09	10,019.95	-403.15	Sale	
09/26/11 4,955.038	142,144.75	VARIOUS	154,967.97	-12,823.22	Total of 7 lots	
Security total:	152,124.80		164,050.95	-11,926.15		
DODGE & COX STOCK FUND N/L / CUSIP: 256219106						
02/24/11 88.472	9,980.05	03/06/08	10,873.70	-893.65	Sale	

8 - Tax lots: NONCOVERED\*\*

6 - Tax lots: NONCOVERED\*\*

(continued)

## 8 - LONG-TERM GAINS AND LOSSES - Cost basis is NOT reported to the IRS

Report on Form 8949, Part II, with Box B checked

8 - Tax lots: NONCOVERED\*\*

6 - Tax lots: NONCOVERED\*\*

## 9 - Description / CUSIP/ Symbol

## 1a - Date of Sale or exchange

## 2 - Proceeds of #

## stocks, bonds, etc.

## Date of acquisition

## 9 - Description / CUSIP/ Symbol

## Quantity

## Cost of other basis

## Cost or other basis

These columns are not reported to the IRS

## DODGE &amp; COX STOCK FUND N/L / CUSIP: 256219106 (Cont'd)

## 4 tax lots for 09/26/11. Total proceeds (and cost when required) reported to the IRS.

62.404	5,907.00	VARIOUS	6,366.35	-459.35	Sale
175.778	16,638.65	03/06/08	21,604.09	-4,965.44	Sale
407.843	38,605.27	03/18/09	26,019.95	12,585.32	Sale
67.239	6,364.65	12/16/09	6,519.95	-155.30	Sale
713.264	67,515.57	VARIOUS	60,510.34	7,005.23	Total of 4 lots
Security total:	77,495.62		71,384.04	6,111.58	

## EAGLE CAPITAL APPRECIATION FUN / CUSIP: 26945A100

## 02/24/11 350.018 9,980.05 01/23/06 9,965.01 15.04 Sale

## 5 tax lots for 09/26/11. Total proceeds (and cost when required) reported to the IRS.

826.473	21,116.39	VARIOUS	24,416.28	-3,299.89	Sale
557.060	14,222.88	01/23/06	15,859.50	-1,626.62	Sale
1,409.836	36,021.31	12/29/06	43,000.00	-6,978.69	Sale
2,228.916	56,948.80	03/18/09	37,000.00	19,948.80	Sale
363.783	9,294.66	12/16/09	9,019.95	274.71	Sale
5,386.068	137,614.04	VARIOUS	129,295.73	8,318.31	Total of 5 lots
Security total:	147,594.09		139,260.74	8,333.35	

## EAGLE MID CAP STOCK FUND CLASS / CUSIP: 269858866

## 2 tax lots for 02/24/11. Total proceeds (and cost when required) reported to the IRS.

90.034	2,510.77	VARIOUS	2,521.86	-11.09	Sale
124.405	3,469.28	12/29/06	3,444.78	24.50	Sale
214.439	5,980.05	VARIOUS	5,966.64	13.41	Total of 2 lots

## 5 tax lots for 09/26/11. Total proceeds (and cost when required) reported to the IRS.

267.563	6,287.73	VARIOUS	7,507.83	-1,220.10	Sale
507.592	11,928.41	12/29/06	14,055.22	-2,126.81	Sale
702.001	16,497.02	12/26/07	20,000.00	-3,502.98	Sale
1,136.364	26,704.56	03/18/09	18,000.00	8,704.56	Sale
308.370	7,246.70	12/16/09	7,019.95	226.75	Sale
2,921.890	68,664.42	VARIOUS	66,583.00	2,081.42	Total of 5 lots
Security total:	74,644.47		72,549.64	2,094.83	



# Proceeds from Broker and Barter Exchange Transactions

(continued)

## 8 - LONG-TERM GAINS AND LOSSES - Cost basis is NOT reported to the IRS

Report on Form 8949, Part II, with Box B checked

9 - Description / CUSIP/ Symbol		1a - Date of Sale or exchange	Quantity	2 - Proceeds of stocks, bonds, etc.	Date of acquisition	Cost of other basis	These columns are not reported to the IRS.	Gain or loss	Additional Information
6 - Tax lots: NONCOVERED**									
GINNIE MAE / CUSIP: 36292F2T3	09/28/11	30,000.000	8,796.58	08/19/05	8,458.34	338.24	Sale		
GENERAL ELECTRIC CAPITAL CORPO / CUSIP: 369666RBQ8	09/28/11	10,000.000	9,970.05	08/19/05	10,010.00	-39.95	Sale		
JOHN HANCOCK LIFE INSURANCE CO / CUSIP: 41013NBA5	09/29/11	15,000.000	16,340.00	08/19/05	14,901.25	1,438.75	Sale		
HONEYWELL INTERNATIONAL INC. / CUSIP: 438516AC0	09/30/11	10,000.000	11,565.05	08/19/05	13,521.80	-1,956.75	Sale		
KEEBLEY SMALL CAP VALUE FUND CL / CUSIP: 487300501	5 tax lots for 09/26/11. Total proceeds (and cost when required) reported to the IRS.		3.634	76.06	VARIOUS	73.22	2.84	Sale	
		659.586	13,805.14	12/26/07	19,088.42	-5,283.28	Sale		
		38.211	799.76	01/16/08	1,050.05	-250.29	Sale		
		1,077.752	22,557.34	03/18/09	14,000.00	8,557.34	Sale		
		204.290	4,275.79	12/16/09	4,000.00	275.79	Sale		
	09/26/11	1,983.473	41,514.09	VARIOUS	38,211.69	3,302.40	Total of 5 lots		
POWERSHARES GLOBAL ETF / CUSIP: 73936T565	08/08/11	2,023.000	26,383.68	03/11/09	15,591.79	10,791.89	Sale		
T. ROWE PRICE INTERNATIONAL / CUSIP: 77956H302	09/26/11	846.319	31,500.00	08/24/09	28,739.88	2,760.12	Sale		
RYDEX SGI MANAGED FUTURES / CUSIP: 78356A491	2 tax lots for 09/26/11. Total proceeds (and cost when required) reported to the IRS.		3,014.706	73,438.24	08/24/09	82,000.00	-8,561.76	Sale	
		744.602	18,138.50	12/16/09	20,000.00	-1,861.50	Sale		
	09/26/11	3,759.308	91,576.74	VARIOUS	102,000.00	-10,423.26	Total of 2 lots		
SENTINEL SMALL COMPANY FUND / CUSIP: 817270804	02/24/11	1,231.527	10,000.00	12/29/06	9,261.08	738.92	Sale		

## 8 - LONG-TERM GAINS AND LOSSES - Cost basis is NOT reported to the IRS

Report on Form 8949, Part II, with Box B checked

## 9 - Description / CUSIP/ Symbol

## 1a - Date of Sale

## or exchange

2 - Proceeds of #  
stocks, bonds, etc.

## Quantity

Cost or  
other basis3 - Date of  
acquisition

## Gain or loss

## Additional Information

These columns are not reported to the IRS

THIRD AVENUE REAL ESTATE VALUE / CUSIP: 884116401

4 tax lots for 09/26/11. Total proceeds (and cost when required) reported to the IRS.

112.925	2,199.19	1,862.90	336.29	Sale
1,481.891	28,859.49	37,107.47	-8,247.98	Sale
1,311.475	25,540.67	16,019.95	9,520.72	Sale
337.187	6,566.64	7,019.95	-453.31	Sale
09/26/11	63,165.99	62,010.27	1,155.72	Total of 4 lots

VANGUARD TOTAL BOND MARKET / CUSIP: 921937108

4 tax lots for 09/26/11. Total proceeds (and cost when required) reported to the IRS.

575.365	6,345.60	6,035.38	310.22	Sale
5,946.482	65,582.62	60,019.95	5,562.67	Sale
2,715.810	29,952.15	28,019.95	1,932.20	Sale
5,624.404	62,030.49	59,019.95	3,010.54	Sale
14,862.061	163,910.86	153,095.23	10,815.63	Total of 4 lots

VANGUARD INFLATION PROTECTED / CUSIP: 922031869

4 tax lots for 09/26/11. Total proceeds (and cost when required) reported to the IRS.

77.668	1,094.63	977.35	117.28	Sale
1,248.959	17,602.47	15,019.95	2,582.52	Sale
729.335	10,279.04	9,019.95	1,259.09	Sale
1,007.752	14,202.97	13,019.95	1,183.02	Sale
09/26/11	43,179.11	38,037.20	5,141.91	Total of 4 lots

VERIZON NEW ENGLAND INC. / CUSIP: 92344RA0

04/27/11 25,000.00

25,587.25

08/19/05

27,094.75

-1,507.50

Redemption

Total:

1,038,178.65

33,895.08



JEAN THOMAS LAMBERT FOUNDATION  
 EIN: 34-1897221  
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**PART II BALANCE SHEETS**

SHS, PAR VALUE OR UNITS	DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
LINE 1 - CASH	RAYMOND JAMES CLIENT INTEREST PROGRAM	<u>326,149</u>	<u>326,149</u>
<b>LINE 13 - INVESTMENTS - OTHER</b>			
4,658.661	ARTISAN MID CAP VALUE FUND	83,103	91,776
8,091.445	FPA CRESENT FUND INSTITUTIONAL	206,535	216,689
4,691.299	FIRST EAGLE GLOBAL FUND CLASS A	195,644	211,671
7,127.557	OAKMARK INTERNATIONAL SMALL CAP FUND	80,363	85,387
12,909.709	LOOMIS SAYLES BOND FUND	181,988	179,832
24,255.442	METROPOLITAN WEST TOTAL RETURN BOND	253,703	251,528
7,674.290	NUVEEN TRADEWINDS GLOBAL ALL CAP PLUS FD	218,109	199,148
8,530.344	PIMCO ALL ASSET ALL AUTHORITY FD CLASS A	86,321	85,048
2,222.920	T. ROWE PRICE INTERNATIONAL DISCOVERY	80,258	82,906
14,330.147	SENTINEL SMALL COMPANY FUND	89,765	104,323
6,113.683	TEMPLETON GLOBAL BOND FUND ADVISOR	77,582	75,627
14,218.231	MUTUALHEDGE FRONTIER LEGENDS FUND CL I N.	<u>152,020</u>	<u>141,756</u>
<b>TOTAL INVESTMENTS - OTHER</b>		<b><u>1,705,391</u></b>	<b><u>1,725,691</u></b>
<b>LINE 17 - ACCOUNTS PAYABLE AND ACCRUED EXPENSES</b>			
BALANCE OF 2011 NET INVESTMENT INCOME TAX DUE		<u>780</u>	

THE JEAN THOMAS LAMBERT FOUNDATION  
EIN: 34-1897221

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PAGE 4, PART VII-A, QUESTION 8b EXPLANATION

The State of Ohio has requested that foundations that must file with its Charitable Law Section file with the state a form entitled “Verification of Filing with the Internal Revenue Service” rather than filing the 990-PF with the state. See attached copy of the letter Ohio foundations received from the Ohio Attorney General’s Charitable Law Section.

The Jean Thomas Lambert Foundation will file its 2011 “Verification of Filing with the Internal Revenue Service” form with Ohio the same day that it files its 2011 990-PF with IRS.

«AK3 846010\_v1»



**STATE OF OHIO  
OFFICE OF THE ATTORNEY GENERAL  
JIM PETRO, ATTORNEY GENERAL**

Charitable Law  
150 E. Gay St., 23rd Floor  
Columbus, OH 43215-3130  
  
Telephone: (614) 466-3180  
Facsimile: (614) 466-9788  
[www.ag.state.oh.us](http://www.ag.state.oh.us)

April 2, 2004

Dear Charitable Trustee:

Our records indicate that your organization is registered with the Attorney General pursuant to Ohio's Charitable Trust Act. This letter is being sent to inform you of recent changes to the Administrative Rules and Regulations of Ohio's Charitable Trust Act. **This is not a notification of a delinquency.**

If your organization files a federal form 990, 990-PF or 990-EZ with the Internal Revenue Service, it has been required to file a copy of the federal tax return with our office in the past. However, recent changes to the Administrative Rules now allow organizations headquartered in Ohio to submit the enclosed "VERIFICATION OF FILING WITH THE INTERNAL REVENUE SERVICE" form in lieu of the federal tax return, along with any applicable filing fee. The verification form simply certifies that an organization has submitted the required federal tax return to the Internal Revenue Service. The Internal Revenue Service is now providing the Attorney General with information regarding federal tax filings. Therefore, you will only need to complete the enclosed verification form and return it to our office on or before the fifteenth day of the fifth month following the close of your organization's fiscal tax year, or by any federal extension of time, along with any applicable filing fee. It is important that the required filing fee be postmarked by the financial report due date to avoid assessment of a \$200.00 late fee. Checks should be made payable to "Treasurer, State of Ohio".

If your organization is not based in Ohio, or files a federal form 1041, you will continue to submit a complete copy of your financial return with all attachments, along with any applicable filing fee. Please submit an asset schedule, or you may indicate the fair market value of assets on the federal form 1041.

If your organization had gross receipts of less than twenty-five thousand dollars, or does not otherwise file a federal tax return, you must file the "*Annual Financial Report of Charitable Organization*." This form is available through our website at [www.ag.state.oh.us/ag\\_forms/charitable\\_law.htm](http://www.ag.state.oh.us/ag_forms/charitable_law.htm). If the reported total assets exceed twenty-five thousand dollars, a filing fee is also due. Again, it is important that the required filing fee be postmarked by the financial report due date to avoid assessment of a \$200.00 late fee.

Also available through our website are instructions for filing the Annual Financial Report of Charitable Organization, a copy of Ohio's Charitable Trust Act (Revised Code Chapter 109.23-.33), the revised Administrative Rules and Regulations, the Verification of Filing with the Internal Revenue Service form, and an information sheet which further explains the requirements under this law.

If you do not have access to the Attorney General's website, please contact our office at the telephone number listed below to obtain the required forms.

The Attorney General appreciates your cooperation in complying with these registration requirements. The registry serves to increase public confidence in the integrity of Ohio's charities. If you have any questions, do not hesitate to contact the Charitable Law Section at (614) 466-3180. Thank you for your cooperation and for your work in promoting charitable giving in Ohio.

Sincerely,

JIM PETRO  
ATTORNEY GENERAL



Brian C. Cook  
Senior Deputy Attorney General  
Charitable Law Section  
150 East Gay Street, 23<sup>rd</sup> Floor  
Columbus, Ohio 43215-3130  
(614) 466-3180

**JEAN THOMAS LAMBERT FOUNDATION**  
**EIN: 34-1897221**  
**2011 FORM 990-PF**

**PART VIII (1) - INFORMATION ABOUT OFFICERS, DIRECTORS, TRUSTEE, FOUNDATION MANAGERS, HIGHLY PAID EMPLOYEES AND CONTRACTORS**

<u>(a) Name and address</u>	<u>(b) Title, and average hours per week devoted to position</u>	<u>c) Compensation</u>	<u>d) Contri to employee benefit &amp; def comp.</u>	<u>e) Expense account, other allowances</u>
NANCY REYMAN 30 S. WHEATON RD., AKRON, OH 44313	PRESIDENT & CEO 16 HRS	31,053	0	0
THOMAS LAMBERT 965 23 ROAD, GRAND JUNCTION, CO 81505	TRUSTEE 2 hrs	0	0	0
ADAM REYMAN 220 SOUTH TAYLOR RD GUNNISON, CO 81230	TRUSTEE 2 hrs	0	0	0
BLAKE REYMAN (AS OF 2/07/2011) P.O. BOX 881452 STEAMBOAT SPRINGS, CO 80488-1452	TRUSTEE 2 hrs	0	0	0
PATRICK J WESCHLER 3800 EMBASSY PARKWAY, SUITE 300 AKRON, OH 44333-8332	SECRETARY Less than 1 hr	0	0	0

\* Note Patrick J Weschler is a member of the law firm of Buckingham, Doolittle & Burroughs, LLP, which provides legal, accounting and grant administration services to the Jean Thomas Lambert Foundation. Although he receives compensation from the law firm, he receives no direct compensation from the Foundation. During 2011, the Foundation paid Buckingham, Doolittle & Burroughs \$3,293 for services to the Foundation.

JEAN THOMAS LAMBERT FOUNDATION  
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**PART XV , LINE 3a - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR**

<u>RECIPIENT NAME AND ADDRESS</u>	<u>IF RECIPIENT IS INDIVIDUAL, SHOW RELATION</u>	<u>FOUNDATION STATUS OF RECIPIENT</u>	<u>PURPOSE OF GRANT OR CONTRIBUTION</u>	<u>AMOUNT</u>
WESTERN RESERVE HISTORICAL SOCIETY, 10825 EAST BLVD CLEVELAND, OH 44106	N/A	PUBLIC CHARITY	SPONSORSHIP OF HALE FARM & VILLAGE LEGACY EVENT AND GENERAL SUPPORT	35,000
CLEVELAND ORCHESTRA, SEVERENCE HALL 11001 EUCLID AVE., CLEVELAND, OH 44106	N/A	PUBLIC CHARITY	SPONSORSHIP OF SIZZLE POP EVENT	5,000
THE BECK CENTER FOR THE ARTS 17801 DETROIT AVE , LAKWOOD, OH 44107	N/A	PUBLIC CHARITY	MARKETING, COMMUNICATION PLAN	12,500
FRIENDS OF METRO PARKS, SERVING SUMMIT COUNTY, 975 TREATY LINE RD AKRON, OH 44313	N/A	PUBLIC CHARITY	SCHOLARSHIP FOR STUDENTS TO ATTEND OVERNIGHT NATURE EXPERIENCE	3,000
CRESTED BUTTE AVALANCHE CENTER P O BOX 1061, CRESTED BUTTE, CO 81224	N/A	PUBLIC CHARITY	AVALANCHE FORECASTING - STAFF TRAINING	5,000
McKEE BOTANICAL GARDEN, 350 U S HIGHWAY 1, VERO BEACH, FL 32962	N/A	PUBLIC CHARITY	SPONSORSHIP OF RICHARD LOUV EVENT	5,000

JEAN THOMAS LAMBERT FOUNDATION  
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**PART XV, LINE 3a - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR**

RECIPIENT NAME AND ADDRESS	IF RECIPIENT IS INDIVIDUAL, SHOW RELATION	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
THE NATURE CONSERVANCY, 3500 LORAIN AVE., SUITE 501, CLEVELAND, OH 44113	N/A	PUBLIC CHARITY	CARIBBEAN CORAL REEF RESTORATION & GENERAL SUPPORT	22,500
UNITED WAY OF SUMMIT CTY, OH 90 N. PROSPECT ST., AKRON, OH 44304-1273	N/A	PUBLIC CHARITY	ANNUAL CAMPAIGN/ GENERAL SUPPORT	12,000
CASCADE LOCKS PARK ASSN, 248 FERNDALE ST., AKRON, OH 44304	N/A	PUBLIC CHARITY	GENERAL SUPPORT	1,000
CONSERVANCY FOR CUYAHOGA VALLEY NATIONAL PARK, 1403 WEST HINES HILL RD, PENINSULA, OHIO 44264	N/A	PUBLIC CHARITY	PENINSULA RETAIL STORE DEVELOPMENT	10,000
ST. PAUL'S EPISCOPAL CHURCH 1361 W MARKET ST , AKRON, OH 44313	N/A	PUBLIC CHARITY	GENERAL OPERATING FUND	12,000
(AIARE) AMERICAN INSTITUTE FOR AVALANCHE RESEARCH & EDUCATION 211 S TELLER, GUNNISON, CO 81230	N/A	PUBLIC CHARITY	GENERAL SUPPORT	2,500

JEAN THOMAS LAMBERT FOUNDATION  
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<u>RECIPIENT NAME AND ADDRESS</u>	<u>IF RECIPIENT IS INDIVIDUAL, SHOW RELATION</u>	<u>FOUNDATION STATUS OF RECIPIENT</u>	<u>PURPOSE OF GRANT OR CONTRIBUTION</u>	<u>AMOUNT</u>
UNIVERSITY CIRCLE, INC., 10831 MAGNOLIA DR , CLEVELAND, OH 44106-1997	N/A	PUBLIC CHARITY	GENERAL SUPPORT	5,000
MESA STATE COLLEGE, 1100 NORTH AVENUE, GRAND JUNCTION, CO 81501	N/A	PUBLIC CHARITY	SPONSORSHIP OF NORDIC SKI TEAM	15,000
CLIFFSIDE ARTS COLLABORATIVE P.O. BOX 396, HINCKLEY, OH 44233-9301	N/A	TYPE 1 SUPPORTING ORGANIZATION	INTERNSHIP PROGRAM - GENERAL SUPPORT	2,500
CAMPUS CRUSADE FOR CHRIST P.O. BOX 628222, ORLANDO, FL 32862-8222	N/A	PUBLIC CHARITY	SUPPORT MISSION	41,000
OHIO AND ERIE CANAL CANALWAY COALITION 47 WEST EXCHANGE ST , AKRON, OH 44308	N/A	PUBLIC CHARITY	INTERPRETIVE SIGNAGE	15,000
MYELOMA INSTITUTE FOR RESEARCH AND THERAPY, UNIV. OF ARKANSAS FOR MEDICAL SCIENCES, 4301 WEST MARKHAM, #816 LITTLE ROCK, AR 72205-9985	N/A	PUBLIC CHARITY	GENERAL SUPPORT	5,000

JEAN THOMAS LAMBERT FOUNDATION  
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**PART XV, LINE 3a - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR**

<u>RECIPIENT NAME AND ADDRESS</u>	<u>IF RECIPIENT IS INDIVIDUAL, SHOW RELATION</u>	<u>FOUNDATION STATUS OF RECIPIENT</u>	<u>PURPOSE OF GRANT OR CONTRIBUTION</u>	<u>AMOUNT</u>
HOLDING OUT HELP, 138 E. 12300 S ST C #193, DRAPER, UTAH 84020-7965	N/A	PUBLIC CHARITY	GENERAL SUPPORT	5,000
UNIVERSITY OF AKRON, AKRON, OH 44325-2603	N/A	PUBLIC CHARITY	SYNAPSE PROGRAM	3,000
GARRETT SONNTAG 846 BLOOMFIELD AVE., AKRON, OH 44302	NONE	SCHOLARSHIP RECIPIENT	UNIVERSITY OF AKRON TUITION SCHOLARSHIP	6,000
ALEXANDRIA STAPKA 1183 LINDEN AVE, AKRON, OH 44310	NONE	SCHOLARSHIP RECIPIENT	COLLEGE OF WOOSTER TUITION SCHOLARSHIP	6,000
GINA DOOLITTLE, 1026 COLLINWOOD AVE AKRON, OH 44310	NONE	SCHOLARSHIP RECIPIENT	UNIVERSITY OF TOLEDO TUITION SCHOLARSHIP	3,000
TANNER SCHEETZ, 1885 LANCASTER ST. CUYAHOGA FALLS, OH 44221	NONE	SCHOLARSHIP RECIPIENT	MIAMI UNIVERSITY, OHIO TUITION SCHOLARSHIP	3,000
MELISSA WISE, 4000 HUMPHREY RD. RICHFIELD, OH 44286	NONE	SCHOLARSHIP RECIPIENT	UNIVERSITY OF AKRON TUITION SCHOLARSHIP	250

JEAN THOMAS LAMBERT FOUNDATION  
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**PART XV , LINE 3a - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR**

RECIPIENT NAME AND ADDRESS	IF RECIPIENT IS INDIVIDUAL, SHOW RELATION	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
VERONICA RASICCI, 1560 APPLEWOOD WAY, UNIONTOWN, OH 44685	NONE	SCHOLARSHIP RECIPIENT	BOWLING GREEN ST. UNIV. TUITION SCHOLARSHIP	250
RAVEN BURDETTE, 831 MARIE AVE AKRON, OH 44314	NONE	SCHOLARSHIP RECIPIENT	UNIVERSITY OF AKRON TUITION SCHOLARSHIP	250
AUTUMN BERRY, 4432 RANCHWOOD SPUR AKRON, OH 44333	NONE	SCHOLARSHIP RECIPIENT	MALONE UNIVERSITY TUITION SCHOLARSHIP	250
				<b><u>236,000</u></b>