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## Form 990-PF

Department of the Treasury

Internal Revenue Service

**Return of Private Foundation** 

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

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

OMB No 1545-0052

2011

Fo	r ca	lendar year 2011 or tax year beginning	, an	d ending				
Na	me c	of foundation			A E	mployer identification nur	nber	
Ма	rgai	ret & George Helow Family Foundation Inc.				59-29042	<u> 67</u>	
		r and street (or P O box number if mail is not delivered to street add	iress)	Room/suite	B T	elephone number (see instr	uctions)	
81	18 5	Summit Ridge Lane				(904) 636-	J591	
		own, state, and ZIP code			Cife	exemption application is per	nding, check here	▶□
Jac	:ksc	onville	FL 3	32256-7149	1	,		_
			I return of a former pr		D 1	Foreign organizations, che	ck here	ightharpoonup
_			nded return	<b>,</b>	l	•		
			ie change		1	Foreign organizations mee check here and attach com	-	▶□
ш	Ch	eck type of organization X Section 501(c)(3) exe			Ì			ــا -
		ection 4947(a)(1) nonexempt charitable trust C				private foundation status wa		_
느			_ <del></del>			der section 507(b)(1)(A), cf	leck nere	
ı		r market value of all assets at end J Accounting r		Accrual	1 -	the foundation is in a 60-mo		
		year (from Part II, col (c), Other (sp		- 1	ur	ider section 507(b)(1)(B), ch	еск пеге	
D.	irt l	e 16) ►\$ 6,627,867 (Part I, column (c	i) must be on cash basis	<u>s)</u>	<u> </u>	<u></u>	(d) Disbursem	nents
F	II C	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal	(a) Revenue and	(b) Net investm	ent	(c) Adjusted net	for charitable	
		the amounts in column (a) (see instructions) )	expenses per books	ıncome		income	purposes	
	г.						(cash basis of	nly)
	1	, , , , , , , , , , , , , , , , , , , ,	<del></del>					<del></del>
	2	·	0.40.000			0.40.000		
	3	, , , , , , , , , , , , , , , , , , , ,	248,668		3,668			<del></del> ;
Revenue	4		9,966		9,966	9,966		
	5	a Gross rents				· · · · · · · · · · · · · · · · · · ·	<del></del>	
	١,	b Net rental income or (loss)	4.070	<del>'</del>				<del></del>
	6	a Net gain or (loss) from sale of assets not on line 10	-1,973	<del>&gt;</del>				
Š	၂ ,	b Gross sales price for all assets on line 6a 547,800						
Ř		` ` ` ` ` ` ` ` ` ` ` ` ` ` ` ` ` ` ` `				132	<del></del>	
	8 9	. 3				132		<del></del> :
	١.٠	1		<del></del>				
	۱''	a Gross sales less returns and allowances b Less Cost of goods sold		· · · · · · · · · · · · · · · · · · ·				<del></del> ;
		c Gross profit or (loss) (attach schedule) .						
	11						·	
	12	,	250,004	256		250.700		
	43	<del></del>	256,661		3,634	258,766		
enses	13	•		<del></del>				
SUS	15			<del></del>			<del></del>	<del></del>
X		Pension plans, employee Denefits VED .  a Legal fees (attach schedule)					<del></del>	
МШ		b Accounting fees (attach schedule)		<del></del>	-			
Administrative E		b Accounting fees (attach schedule)  c Other professional fees (attach schedule)  Interest					<del></del>	
> <b>!</b>	17	Interest						
St.	18		2,586					
Ξ.	19		2,500	<del></del>				
<u> </u>	20							
_`ĕ	21	• •						
MAM and /	22							
	23	· ·	4,062					
⊸ 2	24	, ,	-,002					
¢୫⊎୯ ଷ୍ଟ Operating	-	Add lines 13 through 23	6,648					
<b>≱</b> ≱	25	_	334,100				35	34,100
ತೆರ	26		340,748					34,100
	27		340,746					<del>24</del> , 100
	"	a Excess of revenue over expenses and disbursements	-84,087			<b>,</b>		
		b Net investment income (if negative, enter -0-)	-04,007	25	3,634			
		c Adjusted net income (if negative, enter -0-)	<del>  </del>		J,UJ4			
	1	o majastica net movime in negative, enter -v-)	1 }			258,766		

1 Cash—non-interest-bearing 2 Savings and temporary cash investments 3 Accounts receivable 4 Less allowance for doubtiful accounts 4 Pedages receivable 4 Pedages receivable 5 Grants receivable 6 Receivables due from officers, directors, frustees, and other disqualified pessors (attach schedule) [see instructions) 7 Other reviews and barn receivable with the properties of the properties	Da	e4 II	Balance Sheets Attached schedules and amounts in the description column	Beginning of year	End o	of year
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 Receivable discounts 7 Other notes and less receivable (allowance for doubtful accounts ▶ Si reventiones for sale or use 9 Prepaid expenses and deferred charges 10 a Investments—Compares took (altach schedule) 10 a Investments—Saving the government obligations (etituch schedule) 11 Investments—Saving the government obligations (etituch schedule) 12 Investments—Compares took (altach schedule) 13 Investments—Compares took (altach schedule) 14 Less accountised depreciation (fittisch schedule) 15 Investments—Compares took (altach schedule) 16 Investments—Compares took (altach schedule) 17 Investments—Compares took (altach schedule) 18 Investments—Compares took (altach schedule) 19 Investments—Compares took (altach schedule) 10 Investments—Compares took (altach schedule) 11 Investments—Compares took (altach schedule) 12 Investments—Compares took (altach schedule) 13 Investments—Compares took (altach schedule) 14 Leand, buildings, and equipment basis ▶ Less accountised depreciation (fittisch schedule) 15 Other sastest (describe → Key Spurue Bank Note	ΓŒ	TATI	should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
3 Accounts receivable		1	Cash—non-interest-bearing	50,989	14,141	14,141
3 Accounts receivable		2	Savings and temporary cash investments	4,856,996	4,675,406	4,675,406
Less allowance for doubtful accounts    Less allowance for doubtful accounts		3	Accounts receivable			-
Less allowance for doubtful accounts    5 Grants receivable    6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule)   East allowance for doubtful accounts    7 Other notes and loans receivable (oftato shedule)   East allowance for doubtful accounts    8 Investments—Corporate stock (attach schedule)   885,656			Less allowance for doubtful accounts			
Less allowance for doubtful accounts    5 Grants receivable    6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule)   East allowance for doubtful accounts    7 Other notes and loans receivable (oftato shedule)   East allowance for doubtful accounts    8 Investments—Corporate stock (attach schedule)   885,656		4	Pledges receivable		-	
6 Receivables due from officers, directors, frustees, and other disqualified persons (attach schedule)   Less allwance for doubtful accounts   Less accommissed deprenation (attach schedule)   382,760   395,945   398,211   Investments—corporate bonds (attach schedule)   382,760   395,945   398,211   Investments—ondrage loans   Less accumulated deprenation (attach schedule)   Less accumulated deprenation   Less actumulated dep					-	
disqualified persons (attach schedule)   See instructions)  7 Other notes and loans receivable (attach schedule)   Less allowance for doubtful accounts   9 Perpend expenses and deferred charges   3,645 6,559 6,59 6,69 9 Perpend expenses and deferred charges   3,645 6,559 6,69 9 Perpend expenses and deferred charges   3,645 6,559 6,69 9 Perpend expenses and deferred charges   3,645 6,559 6,69 9 Perpend expenses and deferred charges   3,645 6,559 6,69 9 Perpend expenses and deferred charges   3,645 6,559 6,69 9 Perpend expenses and deferred charges   3,645 6,559 6,69 9 Perpend expenses and deferred charges   3,645 6,559 6,69 9 Perpend expenses   4,640 305,945 308,214 78,830 218,30   11 investments—Junio particular schedule   12 Investments—Junio particular schedule   13 Investments—Junio particular schedule   14 Land, buildings, and equipment basis   15 Other assets (describe   Key Source Bank Note   15 Other assets (describe   Key Source Bank Note   15 Other assets (describe   Key Source Bank Note   250,000		5	Grants receivable .			
disqualified persons (attach schedule)   See instructions)  7 Other notes and loans receivable (attach schedule)   Less allowance for doubtful accounts   9 Perpend expenses and deferred charges   3,645 6,559 6,59 6,69 9 Perpend expenses and deferred charges   3,645 6,559 6,69 9 Perpend expenses and deferred charges   3,645 6,559 6,69 9 Perpend expenses and deferred charges   3,645 6,559 6,69 9 Perpend expenses and deferred charges   3,645 6,559 6,69 9 Perpend expenses and deferred charges   3,645 6,559 6,69 9 Perpend expenses and deferred charges   3,645 6,559 6,69 9 Perpend expenses and deferred charges   3,645 6,559 6,69 9 Perpend expenses   4,640 305,945 308,214 78,830 218,30   11 investments—Junio particular schedule   12 Investments—Junio particular schedule   13 Investments—Junio particular schedule   14 Land, buildings, and equipment basis   15 Other assets (describe   Key Source Bank Note   15 Other assets (describe   Key Source Bank Note   15 Other assets (describe   Key Source Bank Note   250,000		6	Receivables due from officers, directors, trustees, and other		-	
Less allowance for doubflul accounts      Note						
8   Inventiones for sale or use   3,645   6,559   6,599     9   Prepared expenses and deferred charges   3,645   6,559   6,599     10 a Investments—U 5 and state government oblepations (attach schedule)   82,214   78,430   218, 154, 154, 154, 155   10   10   10   10   10   10     11   Investments—corporate bonds (attach schedule)   82,214   78,430   218, 154, 154, 154, 155   10   10   10   10   10   10   10		7	Other notes and loans receivable (attach schedule)			
9 Prepaid expenses and deferred charges 3,645 6,559 6; 10,74,236 1,154,5 b Investments—US and state government obligations (attach schedule) 885,0556 1,074,236 1,154,5 b Investments—corporate stock (attach schedule) 2 (Investments—corporate stock (attach schedule) 382,760 305,945 308,2 11 Investments—and, buildings and equipment basis ► Less accumulated depreciation (attach schedule) 12 Investments—mortgage loans 13 Investments—mortgage loans 13 Investments—and (attach schedule) 14 Land, buildings, and equipment basis ► Less accumulated depreciation (attach schedule) 15 Other assets (describe ► Keys Source Bank Note ) 250,000 250,000 250,000 16 Total assets (to be completed by all filers—see the instructions Allos, see page 1, item 1) 6,512,260 6,404,717 6,627,8 17 Accounts payable and accrued expenses 18 Grants payable 20 Lans from officers, directors, fusites, and other disqual/field persons 21 Mortgages and other notes payable (attach schedule) 22 Other habilities (describe ► 20 Completed by all filers—see the instructions Allos, see page 1, item 1) 23 Total liabilities (add lines 17 through 22) 24 Unrestricted 25 Termporarily restricted 26 Permanently restricted 27 Permanently restricted 28 Permanently restricted 29 Retained earnings, accumulated income, endowment, or other funds 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances (see instructions) 31 Total liabilities and net assets/fund balances (see instructions) 4 Charles assets or fund balances (see instructions) 5 (5,512,260 6,404,717) 5 (5,512,260 6,404,717) 6 (5,512,260 6,404,717) 7 (5,512,260 6,404,717) 7 (5,512,260 6,404,717) 8 (6,512,260 6,404,717) 9 (7,512,600 6,404,717) 9 (7,512,600 6,404,717) 9 (7,512,600 6,404,717) 9 (7,512,600 6,404,717) 9 (7,512,600 6,404,717) 9 (7,512,600 6,404,717) 9 (7,512,600 6,404,717) 9 (7,512,600 6,404,717) 9 (7,512,600 6,404,717) 9 (7,512,600 6,404,717) 9 (7,512,600 6,404,717) 9 (7,512,600 6,404,717) 9 (7,512,600 6,404,717) 9 (7,512,600 6,404,717) 9 (7,512,600 6			Less allowance for doubtful accounts			
b Investments—corporate stock (attach schedule)	Ø	8	Inventories for sale or use .			
b Investments—corporate stock (attach schedule)	set	9	Prepaid expenses and deferred charges	3.645	6.559	6,559
b Investments—corporate stock (attach schedule)	Š	10 a				
c Investments—corporate bonds (attach schedule)  11 Investments—and, buildings and equipment basis ▶  Less accumulated deprecation (attach schedule)  12 Investments—other (attach schedule)  13 Investments—other (attach schedule)  14 Land, buildings, and equipment basis ▶  Less accumulated deprecation (attach schedule)  15 Other assets (schesone ▶ Key Source Bank Note ) 250,000 250,000 250,000 250,000 16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item 1) 6,512,260 6,404,717 6,627,8 17 Accounts payable and accrued expenses  17 Accounts payable and accrued expenses  19 Deferred revenue  20 Loss from officers, directors, frustees, and other disqualified persons  21 Mortgages and other notes payable (attach schedule)  22 Other liabilities (desche ▶ )  3 Total liabilities (add lines 17 through 22)  4 Unrestincted  24 Unrestincted  25 Temporanty restricted  26 Permanently restricted  27 Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.  27 Capital stock, trust pinnopal, or current funds  28 Pad-in or capital surplus, or land, bldg , and equipment fund  29 Retained earnings, accumulated income, endowment, or other funds  30 Total net assets or fund balances (see instructions)  31 Total liabilities and net assets/fund balances (see instructions)  32 Total net assets or fund balances (see instructions)  33 Total liabilities and net assets/fund balances (see instructions)  34 Add lines 12, and 3  45 Add lines 12, and 3  46 Add lines 12, and 3  47 Add lines 12, and 3  57 Earter amount from Part I, line 27  58 Paccesses not included in line 2 (itemize) ▶ Investments Cost Basis adjustment  5 Total reases and included in line 2 (itemize) ▶ Investments Cost Basis adjustment  5 Total reases are supported to the support	_	I .				218,550
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26 Permanently restricted Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.  27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg, and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances (see instructions) 31 Total liabilities and net assets/fund balances (see instructions) 4 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)  2 Enter amount from Part I, line 27a 3 Other increases not included in line 2 (itemize)  Investments Cost Basis adjustment  5 23,4	lan	1	Unrestricted			
Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.  7 Capital stock, trust principal, or current funds  8 Paid-in or capital surplus, or land, bldg , and equipment fund  9 Retained earnings, accumulated income, endowment, or other funds  1 Total net assets or fund balances (see instructions)  1 Total liabilities and net assets/fund balances (see instructions)  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 Enter amount from Part I, line 27a  2 Cher increases not included in line 2 (itemize)  Add lines 1, 2, and 3  Decreases not included in line 2 (itemize)  Investments Cost Basis adjustment  5 23,4	Ва	į.	Temporarily restricted			
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)  2 Enter amount from Part I, line 27a  3 Other increases not included in line 2 (itemize)  4 Add lines 1, 2, and 3  5 Decreases not included in line 2 (itemize)  Investments Cost Basis adjustment  5 23,4	ᅙ	26	· · · · · · · · · · · · · · · · · · ·			
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)  2 Enter amount from Part I, line 27a  3 Other increases not included in line 2 (itemize)  4 Add lines 1, 2, and 3  5 Decreases not included in line 2 (itemize)  Investments Cost Basis adjustment  5 23,4	5				ł	
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)  2 Enter amount from Part I, line 27a  3 Other increases not included in line 2 (itemize)  4 Add lines 1, 2, and 3  5 Decreases not included in line 2 (itemize)  Investments Cost Basis adjustment  5 23,4	Ψ.					
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)  2 Enter amount from Part I, line 27a  3 Other increases not included in line 2 (itemize)  4 Add lines 1, 2, and 3  5 Decreases not included in line 2 (itemize)  Investments Cost Basis adjustment  5 23,4	0	1	· · · · · · · · · · · · · · · · · · ·			
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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)  2 Enter amount from Part I, line 27a  3 Other increases not included in line 2 (itemize)  4 Add lines 1, 2, and 3  5 Decreases not included in line 2 (itemize)  Investments Cost Basis adjustment  5 23,4	SS		Retained earnings, accumulated income, endowment, or other funds		6,404,717	
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)  2 Enter amount from Part I, line 27a  3 Other increases not included in line 2 (itemize)  4 Add lines 1, 2, and 3  5 Decreases not included in line 2 (itemize)  Investments Cost Basis adjustment  5 23,4	٨	30	· · · · · · · · · · · · · · · · · · ·	6,512,260	6,404,717	
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)  2 Enter amount from Part I, line 27a  3 Other increases not included in line 2 (itemize)  4 Add lines 1, 2, and 3  5 Decreases not included in line 2 (itemize)  Investments Cost Basis adjustment  5 23,4	Š	31	· ·			
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end-of-year figure reported on prior year's return)  2 Enter amount from Part I, line 27a  3 Other increases not included in line 2 (itemize)  4 Add lines 1, 2, and 3  5 Decreases not included in line 2 (itemize)  Investments Cost Basis adjustment  5 23,4		_				
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3 Other increases not included in line 2 (itemize)  4 Add lines 1, 2, and 3		end-o	f-year figure reported on prior year's return)		1	6,512,260
4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) ► Investments Cost Basis adjustment 5 23,4	2	Enter	amount from Part I, line 27a		. 2	-84,087
5 Decreases not included in line 2 (itemize) ► Investments Cost Basis adjustment 5 23,4	3			•••••	3	
5 Decreases not included in line 2 (itemize) Investments Cost Basis adjustment 5 23,4					. 4	6,428,173
C. Tatalanda and add the state of the state				- <b></b>	5	23,456
	6	Total	net assets or fund balances at end of year (line 4 minus line 5)—Part II, or	olumn (b), line 30	6	6,404,717

	Losses for Tax on Inve		it incor	ne (b) How acquired		<u> </u>	(4) Data and	
	nd(s) of property sold (e g , real esta or common stock, 200 shs MLC Co			P—Purchase D—Donation		Date acquired no , day, yr )	(d) Date sold (mo , day, yr )	
1a Wells Fargo Advisors				Р		12/9/2010	10/4/2011	
b Wells Fargo Advisors				Р		5/12/2009	11/15/2011	
c								
<u>d</u>						<del></del>		
<u>e</u>	(D.D. and allowed		(=) (==+ ==			(h) Cara a	- (lasa)	
(e) Gross sales price	(f) Depreciation allowed (or allowable)			other basis nse of sale		(h) Gain o (e) plus (f) n	• •	
a 456,800				456,668			132	
<b>b</b> 91,000				93,105		····	-2,105	
С						<u></u> .		
d								
_e			f l.t.	40/04/00				
Complete only for assets showing		b by the				(I) Gains (Col. (I	* *	
(ı) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69			s of col (ı) (ı), ıf any		col (k), but not le Losses (fron	·	
а				0,=.,			132	
b							-2,105	
С								
d								
е								
2 Capital gain net income or (ne	et capital loss) { If gain, a			> 1				
. •	(ioss),				2		-1,973	
3 Net short-term capital gain or If gain, also enter in Part I, lin				` '				
	· · · · · · · · · · · · · · ·	-		f 1	3		132	
Part V Qualification Under						come	102	
If section 4940(d)(2) applies, leav Was the foundation liable for the If "Yes," the foundation does not	section 4942 tax on the dis				the b	ase peпod? [	Yes X No	
1 Enter the appropriate amou	nt in each column for each	year; s	ee the ir	structions before	maki	ing any entries.		
(a)	(b)			(c)		(d)		
Base period years  Calendar year (or tax year beginning in)	Adjusted qualifying distributio	ns	Net value o	of noncharitable-use a	ssets		ution ratio ided by col. (c))	
2010		0,100		6,600			0.050013	
2009		6,300		6,525			0 050003	
2008		7,000		6,738			0.050011	
2007		5,500		6,708			0.050008	
2006	33	1,850		6,635	957		0.050008	
2 Total of line 1, column (d)						2	0.250043	
3 Average distribution ratio for		vide the	total or	line 2 by 5, or b	, t		0.200010	
the number of years the found	-			•	´. [	3	0.050009	
				_		_		
4 Enter the net value of noncha	aritable-use assets for 2011	from F	Part X, lir	ne 5	٠	4	6,628,728	
5 Multiply line 4 by line 3					. [	5	331,496	
6 Enter 1% of net investment in	ncome (1% of Part I, line 27	'b)			. [	6	2,586	
7 Add lines 5 and 6						7	334,082	
							33.,302	
8 Enter qualifying distributions in If line 8 is equal to or greater	trom Part XII line 4					8	334,100	

General (or designate) of each state as required by General Instruction G? If "No," attach explanation

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing

. . . . .

complete Part XIV

their names and addresses .

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,"

8b

orm	990-PF (2011) Margaret & George Helow Family Foundation Inc. 59-29	)4267	P	age 5
Par	t VII-A Statements Regarding Activities (continued)			
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		×
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had			
	advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website address ►N/A			
14	The books are in care of ► Joseph P. Helow Telephone no ► (904) 636-0	591		- <i></i>
	Located at ► Same ZIP+4 ►			
15	Section 4947(a)(1) nonexempt chantable 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			
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority		Yes	No
	over a bank, securities, or other financial account in a foreign country?	16	L	<u> </u>
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country			
Рa	rt 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.	T	Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)	ŀ		
	a disqualified person? Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1		4
	(5) Transfer any income or assets to a disqualified person (or make any of either available			1
	for the benefit or use of a disqualified person)?	,		+
	(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			į
	after termination of government service, if terminating within 90 days )			1
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations			
	section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b	N/A	
	Organizations relying on a current notice regarding disaster assistance check here			1
С	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?	1c		. X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section $4942(j)(3)$ or $4942(j)(5)$ )	,		1
а	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?		,	
	If "Yes," list the years 20 , 20 , 20 , 20		1	
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2)			
	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2)			
	to all years listed, answer "No" and attach statement—see instructions)	2b	N/A	
С	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			;
	20			Ĩ.
За	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  Yes X No			
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	1		
	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 )	3b	N/A	
ŧa	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable			
	purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?	4b		X

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 chanitable, etc., organization described in section 599(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)  (5) Provide for any purpose other than religious, chanitable, etc., organization described in section 599(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)  (5) Provide for any purpose other than religious, chanitable, scentific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  (5) Provide for any purpose other than religious, chanitable, scentific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  (6) If any answer is "Yes" to 54(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)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  (6) If "Yes," altach the statement required by Regulations saction 53 4945–5(d)  (6) Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  (7) Pres," altach the statement required by Regulations saction 53 4945–5(d)  (8) Did the foundation, during the year, receive any funds, directly, on a personal benefit contract?  (8) If "Yes," to 8b, file Form 8870  To by Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors  1 List all officers, director	Form 990-PF (20	11) Margaret & George Helow Fa	mily Foundation Inc			59-2904267	Page <b>6</b>		
(1) Carry on propaganda, or otherwise attempt to influence legistation (section 4945(e))?	Part VII-B	Statements Regarding Activiti	es for Which Forr	n 4720 May Be R	Required (continued)				
(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 chantable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(Q)(2)? (see situations)  (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelity to dividen or animals?  (6) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruely to dividen or animals?  (7) If yes, and the statement religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruely to dividen or animals?  (8) If any answer is "Yes" to 5a(1)–(5), did any of the transactions fall to qualify under the exceptions described in Regulations section 33 4945 or in a current notice regarding disaster assistance check here?  (9) If yes, and a statement required by Regulations section \$3.4945-\$(d)  (1) If yes, and a statement required by Regulations section \$3.4945-\$(d)  (1) If yes, and a statement required by Regulations section \$3.4945-\$(d)  (2) Did the foundation, during the year, repay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  (3) No, in Form 897.  (4) If yes, and during the lax year, was the foundation a party to a prohibited tax shelter transaction?  (4) Yes, and Contractors  (5) No, in Form 897.  (6) If yes, in the foundation of the foundation receive any proceeds or have any net income attributable to the transaction?  (5) No, in Form 897.  (6) If yes, in the foundation of the foundation receive any foundation the province of the foundation of t									
(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 chantable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(Q)(2)? (see instructions)  (5) Provide for any purpose other than religious, chantable, scientific, literary, or educational purposes, or for the prevention of cruely to other structions?  (6) Provide for any purpose other than religious, chantable, scientific, literary, or educational purposes, or for the prevention of cruely to other or animals?  (7) If yes, an intervention to the regarding disaster assistance (see instructions)?  (8) Provide for any suppose other than religious, chantable, scientific, literary, or educations provided in proteins of the transactions fall to qualify under the exceptions described in Regulations section 33 4945 or in a current notice regarding disaster assistance check here  (8) If any answer is "Yes" to 5a(1)—(5), did any of the transactions fall to qualify under the exceptions described in Regulations section 33 4945 or in a current notice regarding disaster assistance check here  (8) If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it immaliated expenditure responsibility for the grant of the subject of the subje	(1) Carr	y on propaganda, or otherwise attempt t	o influence legislation (	(section 4945(e))?	. Yes	X No			
(3) Provide a grant to an individual for travel, study, or other similar purposes?    Yes   No    (4) Provide a grant to an organization other than a chantable, etc., organization described in section 599(8/11), (2), or (3), or section 499(d)(8/21) (See instructions)   Yes   No    (5) Provide for any purpose other than religious, chantable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?    Yes   No    If any answer is "Yes" to Sa(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)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here   Sh N/A    If "Yes," attach the statement required by Regulations section 53 4945–5(d)    But the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?    Yes   No    If "Yes," attach the statement required by Regulations section 53 4945–5(d)    Did the foundation, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?    Yes   No    If "Yes," the first of the foundation appropriation of the foundation and provided to the foundation of the foundation receive any proceeds or have any net income attributable to the transaction?    Yes   No    If If yes, and the foundation during the year, premiums, directly or indirectly, on a personal benefit contract?    Yes   No    If If yes, and the foundation during the year of the foundation aparty to a prohibited tax shelter transaction?    Yes   No    If If yes, and the foundation during the year of the foundation aparty to a prohibited tax shelter transaction?    Yes   No    If It is all officers, directions, trustees, foundation managers and their compensation (see instructions). If none, enter "NoNE."    Yes   No    If	<b>(2)</b> Influ	ence the outcome of any specific public	election (see section 4	955); or to carry		_			
(4) Provide a grant to an organization other than a chantable, 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, chantable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  b If any answer is "Yes" to 3(1)-(5), did any of the transactions fall to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here  If the answer is "Yes" to question 5a(4), does the foundation diam exemption from the tax because it maintained expenditure responsibility for the grant?  If "Yes," did the foundation, during the year, receive any funds, directly or indirectly, to pay premium on a personal benefit contract?  If "Yes "to 80, file Form 8870  Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  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  List all officers, directors, trustees, foundation managers and their compensation (see instructions). If none, enter "NONE."  2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, other allowances  (a) Name and address of each employee paid more than \$50,000  (b) Title, and average foundation from the past of the past of the position of the past of the pa	on, e	directly or indirectly, any voter registratio	n drive?		· Yes	X No	!		
(4) Provide a grant to an organization other than a chantable, etc., organization described in section 509(a(1), (2), or (3), or section 4940(d(X2)? (see instructions))  (5) Provide for any purpose other than religious, chantable, scentific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  b If any answer is "Yes" to 3(1)—(5), did any of the transactions fall to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here  If the answer is "Yes" to question 5a(4), does the foundation disaster assistance check here  If the answer is "Yes" to question 5a(4), does the foundation from the tax because it maintained expenditure responsibility for the grant?  If "Yes," district the statement required by Repliations section 53 4945–5(d)  Did the foundation, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  If "Yes," did the foundation during the year, pay premiums, directly or indirectly, on a personal benefit contract?  If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?  Did the foundation receive any proceeds or have any net income attributable to the transaction?  List all officers, directors, trustees, foundation managers and their compensation (see instructions). If N/A  Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors  (a) Name and address (b) Title, and average overline to provide the position of the	(3) Prov	ude a grant to an individual for travel st	idy or other similar nu	noses?		₹ No			
In section 509(a)(1), (2), or (3), or section 4940(a)(2)? (see instructions)  (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelly to children or ammals?  b If any answer is "Yes" to \$a(1)-(5), did any of the transactions fall to qualify under the exceptions described in Regulations section \$349 (360 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions).  If "Yes," at fact the statement required by Regulations section \$34945–5(d)  Did the foundation, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  If "Yes," at fact the statement required by Regulations section \$34945–5(d)  Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  If "Yes "to 80, file Farm 8870  A larry time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Yes \( \text{N} \) No  Fig. No  If \( \text{N} \) No  If	. ,	_	-		ا تعالی				
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educational purposes, or for the prevention of crucity to children or animats?    Ves   No				•	res [				
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)?  Organizations refying on a current notice regarding disaster assistance (see instructions)?  Organizations refying on a current notice regarding disaster assistance (see instructions)?  Organizations refying on a current notice regarding disaster assistance (see instructions)?  Organizations refying on a current notice regarding disaster assistance (see instructions)?  Organizations refying on a current notice regarding disaster assistance (see instructions)?  If the answer is "Yes" to question 53 4945-5(d)  Organization, during the expenditure responsibility for the grant?  If Yes, "altach the statement required by Regulations section 53 4945-5(d)  Organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  If Yes, "altach the statement required by Regulations section 53 4945-5(d)  Organization, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  If Yes, "altach the statement required by Regulations section 53 4945-5(d)  Organization, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  If Yes, "altach the foundation, during the year, pay premiums on a personal benefit contract."  If Yes, "altach the statement required by Regulations section 53 4945-5(d)  Organization of the foundation receive any proceeds or have any net receive any time state the statement of the statement required by Regulations and the statement required by Regulations and the statement of the statement required by Regulations and the statement required by						⊽ │			
Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here  If the answer is "Yes" to question 53(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?  If "Yes" attach the statement required by Regulations section 53 4945-5(d)  But the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  If "Yes" to 86, file Form 8870  A lar by time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Yes X No  If "Yes" to 86, file Form 8870  A lar by time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Yes X No  If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?  To NiA  Part VIII  Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors  List all officers, directors, trustees, foundation managers and their compensation (see instructions).  (a) Name and address (incompanion) (b) Tale, and average devoted to position (file of passition) (c) Compensation (file of passition) (e) Expense account, other allowances)  2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). (e) Expense account, other allowances)  NONE.  (a) Name and address of each employee pad more than \$50,000 (b) Title, and average hours per week devoted to position (c) Compensation (e) Compensation (e) Expense account, other allowances)			-			No			
Organizations relying on a current notice regarding disaster assistance check here  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?  If "Yes," aftach 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?  If "Yes," aftach the statement required by Regulations section 53 4945–5(d)  b Did the foundation, during the year, receive any funds, directly or indirectly, on a personal benefit contract?  If "Yes," bid, file Form 8870  7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Part Vill 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) Tate, and average hours per week evented to position  (b) Tate, and average hours per week evented to position (find paid, enter applying benefit plans and deferred compensation (e) Expense account, other allowances  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) Tale, and average hours per week devoted to position (c) Compensation (e) Compensation (e) Expense account, other allowances  (b) Tale, and average hours per week devoted to position (c) Compensation (e) Compensation (e) Expense account, other allowances  (c) Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, other allowances							1:.7.		
c If the answer is "Yes" to question 53(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?  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?  b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  If "Yes' to 6b, the Form 8070  7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Yes \( \text{No} \)  If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?  Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors  1 List all officers, directors, trustees, foundation managers and the consensation (see instructions).  (a) Name and address  (b) Title, and average hours per week devoted to position  (c) 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 to the rail owners and deferred compensation (d) Contributions to employee benefit plans and deferred compensation (e) Expense account, other allowances  2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."					ons) <sup>,</sup>	50	N/A		
tax because it maintained expenditure responsibility for the grant?    "Yes," attach the statement required by Regulations section 53 4945–5(d)   "A large of the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?   Did the foundation, during the year, receive any funds, directly or indirectly, on a personal benefit contract?   Did the foundation during the year, pay premiums, directly or indirectly, on a personal benefit contract?   Tyes 'to 6b, file Form 8870   Tata At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?   Yes   No   No   No   No   No   No   No   N					. ▶ {	<b>-</b>			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  6b X  1/*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?  7b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?  1 List all officers, directors, 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) Tide, and average territory of position  (c) Compensation (find paid, enter the paid, enter the paid and deferred compensation.  (a) Name and address of each employee paid more than \$50,000  (b) Title, and average thours per week devoted to position  (c) Compensation (d) Contributions to employee benefit plans and deferred compensation.  (d) Contributions to employee paid more than \$50,000  (e) Title, and average thours per week devoted to position  (e) Compensation (d) Contributions to employee benefit plans and deferred compensation.  (e) Expense account, other allowances  (e) Compensation  (f) Compensation (d) Contributions to employee benefit plans and deferred compensation.  (e) Expense account, other allowances				otion from the		<b>→</b>			
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b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?    Yes   No									
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?    "Yes" to 8b, lie Form 8870   Ta. At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?   Yes   X No			nds, directly or indirect	ly, to pay					
## "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?		·	•			<u> </u>	-   -		
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? Yes X No b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?  To N/A  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) Tile, and average hours per week devoted to position  See Statement 2 attached  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) Tile, and average hours per week devoted to position  (c) Compensation  (d) Contributions to (e) Expense account, other allowances  (d) Contributions to and deferred compensation  (e) Expense account, other allowances  (d) Contributions to any other allowances  (e) Expense account, other allowances  (f) Tile, and average hours per week devoted to position  (a) Name and address of each employee paid more than \$50,000  (b) Tile, and average hours per week devoted to position  (c) Compensation  (d) Contributions to employee benefit plans and deferred compensation  (d) Contributions to contributions to provide the provided to position of the allowances  (e) Expense account, other allowances  (f) Compensation  (g) Compensation  (g) Expense account, other allowances  (g) Expense account, other allowances  (g) Expense account, other allowances  (g) Compensation			, directly or indirectly, o	on a personal benefit	contract?	6b	X		
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NONE Compensation	(a) Name and a	address of each employee paid more than \$50,	1 ' '	• 1					
NONE			devoted to position	on .	· · · · · · · · · · · · · · · · · · ·	otheral	iowances		
Total number of other employees paid over \$50,000	NONE								
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	Total number	r of other employees paid over \$50,	000	· · · · · · · ·		<b>&gt;</b>			

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	Information About Officers, Directors, Trustees, Fo	oundation Managers, Highly Paid	Employees,
	and Contractors (continued)		
3 Five highest	-paid independent contractors for professional services (see in	structions). If none, enter "NONE."	
(a) Na	me and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE			
•••••			
Total number of	others receiving over \$50,000 for professional services	<b>.</b>	
Part IX-A	Summary of Direct Charitable Activities		
	four largest direct charitable activities during the tax year. Include relevant star dizations and other beneficiaries served, conferences convened, research paper		Expenses
1			
2	***************************************		
/			
<u></u>			
3			
		•••••	
4			
/		••	
Part IX-B	Summary of Program-Related Investments (see ins	structions)	<u></u>
	gest program-related investments made by the foundation during the tax year of		Amount
1			_
2			
All other program-rel	ated investments. See instructions		
3			
Total. Add lines	1 through 3	· · · · · · · · · · · · · · · · · · ·	

Form **990-PF** (2011)

Par	Minimum Investment Return (All domestic foundations must complete this part. F	oreign foui	ndati	ons,
	see instructions.)			
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,			
	purposes:	, _ 1		
а	Average monthly fair market value of securities	<u>1</u> a	Ц_	2,025,682
b	Average of monthly cash balances	1 <u>t</u>	<u></u>	4,698,737
С	Fair market value of all other assets (see instructions)	10	:	5,254
d	Total (add lines 1a, b, and c)	10	Ц_	6,729,673
е	Reduction claimed for blockage or other factors reported on lines 1a and			
	1c (attach detailed explanation)			
2	Acquisition indebtedness applicable to line 1 assets	. 2	1_	
3	Subtract line 2 from line 1d	3	$\mathbb{T}_{-}$	6,729,673
4	Cash deemed held for charitable activities Enter 1 ½ % of line 3 (for greater amount, see		T	<del>-</del>
	instructions)	4	_ _	100,945
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	$T_{-}$	6,628,728
6	Minimum investment return. Enter 5% of line 5	6		331,436
Par	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating			
	foundations and certain foreign organizations check here $ ightharpoonup$ and do not complete this			
1	Minimum investment return from Part X, line 6	. 1	T	331,436
2a	Tax on investment income for 2011 from Part VI, line 5	2,586	,,,,	<u> </u>
b	Income tax for 2011 (This does not include the tax from Part VI)	, a	ř	
С	Add lines 2a and 2b	20	:	2,586
3	Distributable amount before adjustments Subtract line 2c from line 1	3	-	328,850
4	Recoveries of amounts treated as qualifying distributions	4		
5	Add lines 3 and 4	5	+	328,850
6	Deduction from distributable amount (see instructions)	6	-	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII,		1	
	line 1	7		328,850
				020,000
Par	t XII Qualifying Distributions (see instructions)			
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes	9(3)	$T^{-}$	
а	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	18		334,100
b	Program-related investments—total from Part IX-B	11	<u>,</u>	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out chantable, etc.,	-	$\top$	
	purposes .	2		
3	Amounts set aside for specific charitable projects that satisfy the	×1 •	22	
а	Suitability test (prior IRS approval required)	. 3	ĭ	
b	Cash distribution test (attach the required schedule)	31	,	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	-	334,100
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		1	
	income. Enter 1% of Part I, line 27b (see instructions)	5		2,586
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6		331,514
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether	L		22.,4.,
	qualifies for the section 4940(e) reduction of tax in those years			

GII.	All Ondistributed income (see instructions)				1
1	Distributable amount for 2011 from Part XI,	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
	line 7				328,850
2	Undistributed income, if any, as of the end of 2011				
а	Enter amount for 2010 only				
b	Total for prior years 20, 20, 20				
3	Excess distributions carryover, if any, to 2011				
а	From 2006				
b	From 2007				
С	From 2008	1			
d	From 2009				
е	From 2010 . 330,100				
f	Total of lines 3a through e	330,100			
4	Qualifying distributions for 2011 from Part				<u> </u>
	XII, line 4 ► \$ 334,100				
а				-	
	Applied to undistributed income of prior years				
-	(Election required—see instructions)				
c	Treated as distributions out of corpus (Election				
_	required—see instructions) .				
ч	Applied to 2011 distributable amount				
e		334,100			
5	Excess distributions carryover applied to 2011	330,100		<u> </u>	330,100
•	(If an amount appears in column (d), the	330,100			330,100
	same amount must be shown in column (a) )				
6	Enter the net total of each column as				
•	indicated below:				
а	Corpus Add lines 3f, 4c, and 4e Subtract line 5	334,100			}
b		30 1,100	.,,		
-	line 4b from line 2b				
С	<b> </b>		***.		
Ū	income for which a notice of deficiency has				
	been issued, or on which the section 4942(a)				
	tax has been previously assessed .	-			
А	Subtract line 6c from line 6b Taxable			<u></u>	
u	amount—see instructions				
е					<b></b>
C					
	4a from line 2a Taxable amount—see				
f	Instructions Undistributed income for 2011 Subtract				
•					
	lines 4d and 5 from line 1. This amount must	1			
7	be distributed in 2012			<u> </u>	
7	Amounts treated as distributions out of				
	corpus to satisfy requirements imposed by				
	section 170(b)(1)(F) or 4942(g)(3) (see instructions)				<del> </del>
8	Excess distributions carryover from 2006				
_	not applied on line 5 or line 7 (see instructions)				
9	Excess distributions carryover to 2012.				
	Subtract lines 7 and 8 from line 6a	334,100			
10	Analysis of line 9				
а	Excess from 2007				1
b					
С	Excess from 2009	İ			1
d	Excess from 2010				
e	Excess from 2011				

For	990-PF (2011) · Margaret & George Helow F	amily Foundation	Inc.		59-2904	4267 Page <b>10</b>
Pa	t XIV Private Operating Foundations (	see instructions	and Part VII-A, o	question 9)		N/A
1 a	If the foundation has received a ruling or determin foundation, and the ruling is effective for 2011, en			. •		
b	Check box to indicate whether the foundation is a	private operating fo	undation described	ın section	4942(J)(3) or	4942(J)(5)
2 a	Enter the lesser of the adjusted net	Tax year	T	Prior 3 years		
	income from Part I or the minimum investment return from Part X for each	(a) 2011	(b) 2010	(c) 2009	(d) 2008	(e) Total
	year listed	, ,				
b	85% of line 2a		†			
С	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
е	Qualifying distributions made directly					
	for active conduct of exempt activities Subtract line 2d from line 2c	:				
3	Complete 3a, b, or c for the alternative test relied upon "Assets" alternative test—enter					
-	(1) Value of all assets			1	i	
	(2) Value of assets qualifying					<del></del>
h	under section 4942(j)(3)(B)(i) "Endowment" alternative test—enter 2/3		<u> </u>	<del> </del>		
, L	of minimum investment return shown in Part X, line 6 for each year listed					
C	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
	(3) Largest amount of support					
	from an exempt organization (4) Gross investment income					
P.o	· · · · · · · · · · · · · · · · · · ·		1 - 1 - 64 - 6	14: 1 105		
<u></u>	rt XV Supplementary Information (Co assets at any time during the ye			indation had \$5	,000 or more in	
1	Information Regarding Foundation Manag					
а	List any managers of the foundation who have conbefore the close of any tax year (but only if they have				the foundation	
N1/A	. , , , ,	ave contributed mor	e man \$5,000) (See	e section 507(a)(2) )		
<u>N/A</u>	List any managers of the foundation who own 10%	6 or more of the ste	ck of a composition (	or an equally lerge n	ortion of the	
	ownership of a partnership or other entity) of which				orden or the	
N/A	•		3			
2	Information Regarding Contribution, Gran Check here   X if the foundation only makes unsolicited requests for funds. If the foundation makes are considered to the foundation makes are considered to the foundation makes.	contributions to pre	eselected chantable	organizations and de	pes not accept anizations under	
	other conditions, complete items 2a, b, c, and d.					
а	The name, address, and telephone number of the	person to whom ap	plications should be	addressed		
51/4						
<u>N/A</u> b	The form in which applications should be submitted	ed and information a	nd materials they sh	nould include		
N/A						
С	Any submission deadlines					
N/A	·					
d	Any restrictions or limitations on awards, such as factors	by geographical are	as, chantable fields,	kınds of institutions,	or other	
N/A						

Part XV Supplementary Information (continued)

3	Grants and Contributions Paid During th	ne Year or Approved	for Future	Payment	
	Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
	Name and address (home or business)	or substantial contributor	recipient	Contribution	
a See	Paid during the year Statement 3	or substantial contributor	recipient		334,10
b	Total			▶ 3a	

	ow Family Foundation Inc			59-290	4267 Page <b>12</b>
Part XVI-A Analysis of Income-Prod	ucing Activities				
Enter gross amounts unless otherwise indic	ated Unrelated bus	iness income	Excluded by section	n 512, 513, or 514	(e)
<b>3</b>	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income
Program service revenue     a			-	-	(See instructions )
b					
С					
d					
e	• • • • • • • • • • • • • • • • • • •				
f					
g Fees and contracts from government age	ncies				
2 Membership dues and assessments	•				
3 Interest on savings and temporary cash inves	stments	248,668			
4 Dividends and interest from securities	•	9,966	14	N''3 4 1 1	\$
5 Net rental income or (loss) from real estate	1		Simmer Care A	3	****
<ul><li>a Debt-financed property</li><li>b Not debt-financed property</li></ul>					
6 Net rental income or (loss) from personal pro	nerty			<del></del>	<del>-</del> ,
7 Other investment income	perty	<u>-</u>			
8 Gain or (loss) from sales of assets other than	inventory	-1,973	18		
9 Net income or (loss) from special events		1,070			
10 Gross profit or (loss) from sales of inventory		-			
11 Other revenue a					
b					
c					
d					
e					<b></b>
12 Subtotal Add columns (b), (d), and (e)	,	256,661	1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1		<u> </u>
13 Total. Add line 12, columns (b), (d), and (e)	Inclation N		•	13	256,661
(See worksheet in line 13 instructions to verify ca		- f 5 t D			
Part XVI-B Relationship of Activities  Line No. Explain below how each activity fo					
Line No. Explain below how each activity fo the accomplishment of the foundar					ictions )
	, , , , , , , , , , , , , , , , , , , ,		The state of the s		
			<u>-</u>		
	····		<del></del>		
		, -, -,-			
		<del></del>	<del></del>		
	<del></del>				
			<del> </del>		
	····	<del></del>	·		

## Form 990-PF (2011) Margaret & George Helow Family Foundation Inc. 59-2904267 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations**

1	ın sect	e organization directly ion 501(c) of the Code							,	Yes	No
	organi	zations?							- 7.		
а	Transf	ers from the reporting	foundation to	a nonchantable exe	mpt organiza	tion of:			, v	٠٠ ]	
	(1) Ca				-				1a(1)	1	x
		her assets							1a(2)		X
b	` '	ransactions:							· * ~ x	• ′	<del>~~~</del>
		les of assets to a non-	chantable eve	empt organization					1b(1)	•	X
		rchases of assets from				•			1b(2)		$\frac{\hat{x}}{x}$
		ntal of facilities, equip				•		•	_		
									1b(3)		_X_
		imbursement arrange							1b(4)		X
		ans or loan guarantee							1b(5)		X
		rformance of services		•					1b(6)		X
С	Shann	g of facilities, equipme	ent, mailing lis	sts, other assets, or p	oaid employee	es .			1c		X
	value o	inswer to any of the about the goods, other asson any transaction or si	sets, or service haring arrang	es given by the repo ement, show in colur	rting foundati nn (d) the val	on. If th	ne foundation re- ne goods, other	ceived less than assets, or servi	n fair ma ces rec	arket eived	
(a)	Line no	(b) Amount involved	(c) Name	of nonchantable exempt or	ganization	(d) Des	scription of transfers,	transactions, and st	nanng arra	angeme	ents
			<u> </u>	<del>-</del>							
		·									
		<del></del>									
					-						
_			İ								
	_										
								· ·			
				· - · · · · · · · · · · · · · · · · · ·	—— ··		'At.				
22	Is the f	oundation directly or i	ndirectly affilia	ated with or related t	to one or mo	re tay c	vomet erganiza	tions			
	describ	ped in section 501(c) of "complete the following complete the follow	of the Code (c	other than section 50	1(c)(3)) or in	section	527?		′es 🗌	No	
		(a) Name of organization		(b) Type of	organization		(c)	Description of relation	nship		
					·	,					
	Ur	der penalties of perjury, I declare t	ihat I have examined	this return, including accompany	ing schedules and st	latements, a	and to the best of my kno	wledge and belief, it is tr	ue,		
<b>c</b> :	l co	rrect, and complete Declaration of									
Si	~ I.		<i>[ ] .</i>					May the IRS			
He	re 🕽	1-1-1-4	chel .	5-10-12	$\mathcal{L}_{\mathcal{L}}$	side	1	with the prepa			
		Signature of officer or vustee	<del>- ••</del> -	Date	- ' Title	more	<b>T</b>	instructions)?	Ye	s X	NO
		Print/Type preparer's na	ame	Preparer's signature			Date		PTIN		
Pa	id	January properties 3 ftc					Date	Check I if	[ . I IIN		
	epare:	Donald A. Toce, C	PA	Oandla 7	The CPA		4/30/2012	self-employed	P0122	7333	
	•	Eurola sama	nald A. Toce,		2.70		170072012		6-1209		
US	e Onl	V		, Jacksonville, FL 32	245		<del></del>				
		Timo addiess - P.(	J BUX 340 13	, Jacksonville, FL 32	240			100	710-3		
								F	orm <b>990</b>	1-PF	(2011)

## Line 18 (990-PF) - Taxes

Margaret & George Helow Family Foundation Inc

	Disbursements Adjusted for Chantable Net Income	╁╴									
2,586	Net Investment										
2,5	Revenue and Expenses	2,5									
	Description	Tax on investment income									
		-	2	ဗ	4	2	9	7	8	6	10

# Line 23 (990-PF) - Other Expenses

Margaret & George Helow Family Foundation Inc

		4,062			
		Revenue and			
		Expenses	Net Investment		Adjusted Net
	Description	per Books	Income	lr.	come
	Early Withdrawl Fee	4,001			
, ,	Annual State Registration Fee	61			
					·

## Margaret & George Helow Family Foundation

59-2904267 2011 Form 990 PF Statement #1 Part II Balance Sheet

Part II Balance Sheet	Beg. Of Year Book Value		End Of Year Book Value		End Of Year FMV	
Line 10a - U.S. & State Gov Obligations						
Guam Airport Authority	\$	47,778	\$	47,778	\$	51,238
West Haven CT	\$	49,063	\$	49,063	\$	50,593
Cook County IL School Dist	\$	51,091	\$	51,091	\$	55,228
Cook County, IL #201	N/A		\$	80,836	\$	90,231
Gainesville FL Pension	\$	82,489	\$	82,489	\$	92,212
Orange County Pension	\$	60,165	\$	60,165	\$	66,844
Trenton NJ	\$	59,236	\$	59,236	\$	64,895
Luzerne County PA	\$	61,436	\$	46,109	\$	46,647
Lackawanna County PA	\$	25,719	\$	65,959	\$	65,064
New Castle, PA	\$	249,063	N/A		N/A	
Alameda County Pension	N/A		\$	19,344	\$	19,558
Compton, CA	N/A		\$	77,780	\$	89,092
New Jersey Econ Dev	N/A		\$	81,110	\$	89,294
Oakland, CA	N/A		\$	38,931	\$	39,000
San Bernardino County	N/A		\$	36,400	\$	37,805
Missouri St. Housing	N/A		\$	5,099	\$	5,627
Toledo OH	N/A		\$	52,438	\$	53,256
Portland, OR	N/A		\$	10,035	\$	10,043
DeKalb County GA	N/A		\$	10,757	\$	11,437
Gainesville FL 10-01-15	\$	92,953	\$	92,953	\$	101,202
York PA	\$	42,399	\$	42,399	\$	45,142
Jackson & Williamson County IL	\$	64,264	\$	64,264	\$	70,524
Total Gov. Obligations	\$	885,656	\$	1,074,236	\$	1,154,932

Line 10b Investments	- Corporate Stock
----------------------	-------------------

5,000 Shares Entertainment Prop.	\$ 82,214	\$	78,430	\$	218,550
Total Corporate Stock	\$ 82,214	\$	78,430	\$	218,550
Line 10c Investments - Corporate Bonds					
Hartford Life Global	\$ 49,058	N/A		N/A	
Unimprovident Cap	\$ 27,757	N/A		N/A	
Goldman Sachs	\$ 105,350	\$	105,350	\$	102,530
Morgan Stanley	\$ 100,820	\$	100,820	\$	98,629
BP Capital Markets	\$ 99,775	\$	99,775	\$	107,120
Total Corporate Bonds	\$ 382,760	\$	305,945	\$	308,279

59-2904267 Margaret & George Helow Family Foundation 9140 Golfside Drive, #7 Jacksonville, FL 32256

2011 Form 990PF Statement 2 Part VIII

George A. Helow	<u>Title</u> Chairman/Director 2 hrs/wk	Contribution 0	Exp-A/C 0	Compensation 0
Margaret O. Helow	Secretary/Treasurer Director	0	0	0
Joseph P. Helow	President/Director 2 hrs/wk	0	0	0
Mary H Pritchard	Director	0	0	0
Anne H. Darling	Director	0	0	0
Diane H. Parker	Director	0	0	0
Katherine H. Gilligan	Director	0	0	0
Theresa H. Ryan	Director	0	0	0

Note

Mailing Address for all Directors

9140 Golfside Drive, #7 Jacksonville, FL 32256

### 59-2904267 Margaret & George Helow Family Foundation 9140 Golfside Drive, Suite 7 Jacksonville, FL 32256

2011 Form 990 PF Part XV Statement 3

	INDIVIDUAL	PURPOSE	<u>AN</u>	MOUNT
St Vincent's Foundation 1800 Barrs Street Jacksonville, FL 32203	N/A	Charitable	\$	10,000
Journeys of Faith P.O. Box 845 Morrilton, AR 72110	N/A	Charitable	\$	5,000
Franciscan University of Steubenville 1235 University Blvd. Steubenville, Ohio 43952	N/A	Charitable	\$	5,000
Food For the Poor, Inc. 550 S.W. 12th Avenue Deerfield Beach, FL 33442	N/A	Charitable	\$	10,000
United Way of Northeast Florida P.O. Box 41428 Jacksonville, FL 32203-1428	N/A	Charitable	\$	10,000
The Guardian of Dreams 134 East Church Street Jacksonville, FL 32202	N/A	Charitable	\$	10,000
I.M. Sulzbacher Center For the Homeless 611 East Adams Street Jacksonville, FL 32202	N/A	Charitable	\$	25,000
Franciscan Friars of the Renewal 1 Pryer Manor Road Larchmont, NY 10538	N/A	Charitable	\$	5,000
Holy Family Catholic Church 9800 Baymeadows Road Jacksonville, FL 32256	N/A	Charitable	\$	79,100
Eternal Word Television Network 5817 Old Leeds Road Irondale, AL 35210	N/A	Charitable	\$	10,000

Catholic Charities Bureau 134 East Church Street, #2 Jacksonville, FL 32202	N/A	Charitable	\$ 10,000
FOCUS P.O. Box 1210 Greeley, CO 80632	N/A	Charitable	\$ 10,000
Apostolate For Family Consecration 3375 County Road 36 Bloomingdale, OH 43910	N/A	Charitable	\$ 5,000
Communita Cenacolo America, Inc. 24 Cathedral Place, #307 St. Augustine, FL 32084	N/A	Charitable	\$ 10,000
Thomas More Law Center 24 Frank Lloyd Wright Drive Ann Arbor, MI 48106	N/A	Charitable	\$ 5,000
St. Gerard Campus P.O. Box 4382 St. Augustine, FL. 32085	N/A	Charitable	\$ 5,000
Emergency Pregnancy Services 1555 Oak Street Jacksonville, FL 32204	N/A	Charitable	\$ 5,000
Diocese of St. Augustine 11625 Old St. Augustine Road Jacksonville, FL 32258	N/A	Charitable	\$ 50,000
Archdiocese for Military Services P.O. Box 29149 Washington, DC 20077-5210	N/A	Charitable	\$ 10,000
Mercy Ships P.O. Box 2020 Garden Valley, TX 75771	N/A	Charitable	\$ 5,000
Pilgrims Peace Center P.O. Box 1439 Crystal River, FL 34423-1439	N/A	Charitable	\$ 5,000
Sisters of Reparation P.O. Box 3 Steubenville, OH 43952	N/A	Charitable	\$ 5,000
Women's Help Center 4209 University Blvd. South Jacksonville, FL 32216	N/A	Charitable	\$ 5,000

Operation New Hope 1830 North Main Street Jacksonville, FL 32206	N/A	Charitable	\$ 10,000
Life-Can, Inc. 5445 SW Woodham Street Palm City, FL 34990	N/A	Charitable	\$ 10,000
Hospice of Northeast Florida 4266 Sunbeam Road Jacksonville, FL 32257	N/A	Charitable	\$ 5,000
Harbor House 700 Arlington Road Jacksonville, FL 32211	N/A	Charitable	\$ 5,000
The Crudem Foundation P.O. Box 804 Ludlow, MA 01056	N/A	Charitable	\$ 5,000
Total			\$ 334,100

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