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

2011

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 DEC 1, 2011, and ending NOV 30, 2012

Name of foundation
POTTSTOWN MERCURY FOUNDATION

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

City or town, state, and ZIP code
POTTSTOWN, PA 19464

Room/suite

A Employer identification number
23-6256419

B Telephone number
610-323-3000

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16)
\$ 45,144. (Part I, column (d) must be on cash basis.)

J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____

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).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	62,777.		N/A	
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	38.	38.		STATEMENT 1
	4 Dividends and interest from securities				
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11	62,815.	38.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 2	1,375.	0.		0.
	c Other professional fees				
	17 Interest				
	18 Taxes				
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 3	196.	0.		0.
	24 Total operating and administrative expenses. Add lines 13 through 23	1,571.	0.		0.
	25 Contributions, gifts, grants paid	50,915.			50,915.
26 Total expenses and disbursements. Add lines 24 and 25	52,486.	0.		50,915.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	10,329.				
b Net investment income (if negative, enter -0-)		38.			
c Adjusted net income (if negative, enter -0-)			N/A		

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	34,815.	45,144.	45,144.
	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			
	7 Other notes and loans receivable			
	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			
	b Investments - corporate stock			
	c Investments - corporate bonds			
11 Investments - land, buildings, and equipment: basis				
Less: accumulated depreciation				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment: basis				
Less: accumulated depreciation				
15 Other assets (describe)				
16 Total assets (to be completed by all filers)	34,815.	45,144.	45,144.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	34,815.	45,144.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input type="checkbox"/> 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	34,815.	45,144.		
31 Total liabilities and net assets/fund balances	34,815.	45,144.		

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	34,815.
2 Enter amount from Part I, line 27a	2	10,329.
3 Other increases not included in line 2 (itemize)	3	0.
4 Add lines 1, 2, and 3	4	45,144.
5 Decreases not included in line 2 (itemize)	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	45,144.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b NONE			
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			
b			
c			
d			
e			

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

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2
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). If (loss), enter -0- in Part I, line 8		3

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2010	77,415.	37,194.	2.081384
2009	53,606.	58,140.	.922016
2008	40,760.	50,328.	.809887
2007	38,670.	41,370.	.934735
2006	39,107.	25,843.	1.513253

2 Total of line 1, column (d)	2	6.261275
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	1.252255
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	40,662.
5 Multiply line 4 by line 3	5	50,919.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	0.
7 Add lines 5 and 6	7	50,919.
8 Enter qualifying distributions from Part XII, line 4	8	50,915.

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)

1a 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 instructions)			
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.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	1.
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.
6 Credits/Payments:			
a 2011 estimated tax payments and 2010 overpayment credited to 2011	6a		
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		0.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		1.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2012 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 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.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> PA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)			X
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)			X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?		X	
Website address ► N/A				
14	The books are in care of ► POTTSTOWN MERCURY	Telephone no. ► (610) 323-3000		
Located at ► 24 NORTH HANOVER STREET, POTTSTOWN, PA		ZIP+4 ► 19464		
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	N/A	
16	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?	16	Yes	No
See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►				X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	N/A	
Organizations relying on a current notice regarding disaster assistance check here	► <input type="checkbox"/>	
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011?	1b	
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)):	1c	X
a 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 ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	2b	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 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.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	3b	
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?	4a	X
	4b	X

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

5a During the year did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here ☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

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

6b

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(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
NANCY MARCH C/O THE POTTSTOWN MERCURY, 24 N HANOV POTTSTOWN, PA 19464	OFFICER 1.00	0.	0.	0.
PATRICIA MCKELVEY C/O THE POTTSTOWN MERCURY, 24 N HANOV POTTSTOWN, PA 19464	OFFICER 1.00	0.	0.	0.

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

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

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

0

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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	0.
b	Average of monthly cash balances	1b	41,281.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	41,281.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	41,281.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	619.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	40,662.
6	Minimum investment return. Enter 5% of line 5	6	2,033.

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	2,033.
2a	Tax on investment income for 2011 from Part VI, line 5	2a	1.
b	Income tax for 2011. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,032.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	2,032.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	2,032.

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	50,915.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	50,915.
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	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	50,915.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				2,032.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006	37,815.			
b From 2007	36,601.			
c From 2008	38,244.			
d From 2009	50,399.			
e From 2010	75,555.			
f Total of lines 3a through e	238,614.			
4 Qualifying distributions for 2011 from Part XII, line 4: ► \$	50,915.			
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				2,032.
e Remaining amount distributed out of corpus	48,883.			
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	287,497.			
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 instr.			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)	0.			
8 Excess distributions carryover from 2006 not applied on line 5 or line 7	37,815.			
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	249,682.			
10 Analysis of line 9:				
a Excess from 2007	36,601.			
b Excess from 2008	38,244.			
c Excess from 2009	50,399.			
d Excess from 2010	75,555.			
e Excess from 2011	48,883.			

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
OPERATION HOLIDAY-CHRISTMAS 2012-SEE ATTACHED LISTING AND ATTACHED FOOTNOTE 24 N. HANOVER ST. POTTSTOWN, PA 19464	NONE	PUBLIC	PROVIDING FOOD AND TOYS TO INDIGENT AND NEEDY	50,915.
Total			3a	50,915.
b Approved for future payment				
NONE				
Total			3b	0.

2011.05050 POTTSTOWN MERCURY FOUNDATIO 69069 1

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
SUSQUEHANNA BANK CHECKING ACCOUNT	38.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	38.

FORM 990-PF ACCOUNTING FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	1,375.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	1,375.	0.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
REGISTRATION	100.	0.		0.
POST OFFICE EXPENSE	96.	0.		0.
TO FORM 990-PF, PG 1, LN 23	196.	0.		0.

FOOTNOTES STATEMENT 4

ATTACHMENT TO FORM 990-PF, PAGE 10, PART XV,
QUESTION 3, GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR OR
APPROVED FOR FUTURE PAYMENT

THE FOUNDATION PROVIDED ASSISTANCE TO INDIGENT AND NEEDY
FAMILIES IN THE POTTSTOWN COMMUNITY THROUGH
OPERATION HOLIDAY

THE FOUNDATION OBTAINED A LIST OF NAMES OF INDIGENT AND
NEEDY FAMILIES FROM THE FOLLOWING SEC. 501(C)(3)
ORGANIZATIONS:

SALVATION ARMY, 51 E. SECOND STREET, BOYERTOWN, PA

- UNITED WAY OF POTTSTOWN & VICINITY, 360 KING STREET,
POTTSTOWN, PA
- POTTSTOWN CLUSTER OF RELIGIOUS COMMUNITIES, 57 N. FRANKLIN
ST, POTTSTOWN, PA

THE FOUNDATION'S ADMINISTRATIVE STAFF REVIEWS THE LISTS
PRIOR TO MAKING DISTRIBUTIONS OF FOOD AND TOYS.

OPERATION HOLIDAY INVOLVES THE DISTRIBUTION OF TOYS AND FOOD
TO INDIGENT AND NEEDY FAMILIES AT CHRISTMAS.

[illegible]

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Community Services of Devereux
1041 W. Bridge St.
Phoenixville, PA 19460
Kristen Henry
610-933-8110 ext. 2481

14

Heather White
610-705-0798
3 children

Victoria Rodriguez
610-551-9912
2 children

Emma Williams
610-935-0135
1 child

Missy Templeton
610-933-8205
2 children

Nikki MacElree
610-469-6095
1 child

Carrie Lupacckino
484-300-8627
2 children

Alyson Wildamn
484-429-4682
2 children

Sharon Polmales
484-686-0869
1 child

Creative Health Services
11 Robinson St.
Pottstown, PA 19464
Jaime Tyson
610-326-2767

24

Dawn Douglass
484 363 0981
2 children

Tia Baker
484 363 0981
1 child

Carol & Donald Swoyer
484 334 3030
3 children

Alena DeDominic
484 598 3148
1 child

Alicia Lamish
484 300 2128
3 children

Katrina Skains
484 300 7548
3 children

Sue Cole
484 524 5430
1 child

Charlene and James Boyette
484-374-0500
3 children

Crystal Collins
610 310 5172
3 children

Buffy Strunk
484 374 7289
4 children

Easter Seals, SE PA
1161 Forty Foot Rd., Box 333
Kulpsville, PA 19443
Alyson Hemberger
610-764-8726

12

Jennifer Mohn
215-767-0141
2 children

Maranda Walski
484-751-8262
1 child

Victoria Upsey
484-751-7220
2 children

Betty Clements
610-327-3494
4 children

Shannon Eppehimer
610-754-0659
2 children

Stephanie Richards
no phone
1 child

Green Lane Head Start
3004 Main St.
Green Lane, PA 18054
Finí Alegre (Director) (cell 267-575-0539)
215-234-1860 or 1861 (school)

27

Daniel and Angela Morlock
215-679-2481
2 children

Andres Sandoval and Blanca Castillo
484-534-7747
5 children

Daniel Trezza, Sr.
267-373-8920
1 child

Michelle Odom
267-474-6121
4 children

Autumn Dawson
267-347-3786
2 children

Alia Samples
215-541-1056
2 children

Tiffany Trump
267-733-8609
3 children

Jennifer Firrinceli
267-498-8076
2 children

Victor Garcia and Karen Martinez
267-932-8199
3 children

Stephen Pistola
610-369-1681
3 children

Montgomery County Assistance Office
1931 New Hope St.
Norristown, PA 19401
Donna McMahon / Margaret Bauer
610-270-3550 / 610-327-5615

30

Avis Gadson
484-751-3695
3 children

Kimberly Robinson
484-689-3267
2 children

Melissa Maldonado
484-366-9535
5 children

Kunitra Adams
610-323-6575
4 children

Tanya Arms
814-933-4049
2 children

Bridget Jackson
484-363-9882
2 children

Nikia Jackson
267-333-7128
2 children

Kelly Burton
484-477-6720
4 children

Danielle Brown
1-570-581-1990
4 children

Lakeaha Solomon
610-323-4323
2 children

Montgomery County Community College 22
101 College Drive
Pottstown, PA 19464
Lori Davidson
610-718-1841

Diana Checchia
610-327-6897
3 children

Teresa Hiller
847-890-0244
2 children

Lashonda Watkins
484-374-8515
2 children

Monica Lamb
484-366-9736
2 children

Keri Cushman
610-800-0411
5 children

Kirah Iovanna
484-948-7443
3 children

Ashley Sloy
484-363-3788
1 child

Sandra Hills
484-300-6984
4 children

Montgomery County Head Start
Lower Pottsgrove
699 N. Pleasant View Rd.
Pottstown, PA 19464
Alice Long
610-326-9205 or 610-326-5908

27

Sonja Mast
484-374-3964
1 child

Krystal Ray
484-624-7021
2 children

Sue Jacobs
484-624-3767
3 children

Jenna Barto
484-949-4903
2 children

Brittany Cox
610-326-5174
2 children

Lorie McCann
610-327-0800
4 children

Doreen Post
484-973-6188
3 children

Wendy Keefer
610-489-2171
1 child

Veretina Harris
484-524-2761
4 children

Ashley Johnson
484-300-8696
2 children

Christine Brennan
484-624-4993
3 children

Montgomery County Head Start (Potts 1-2-3)
301 King St.
Pottstown, PA 19464
Sadie Bonilla
610-326-9177

Pottstown-1:
Katrina Boughter
610-850-1961
3 children

29

Carmela Trego
484-688-3384
1 child

Antonia Amigon
610-802-1516
3 children

Shanicqua Suber
610-970-6328
3 children

Eva Hums
610-326-4237
3 children

Kathy Snyder
484-300-4110
3 children

Erica Leibensperger
484-624-5177
5 children

Kate Jensen
484-632-1597
5 children

Heidi Foraker
484-624-5240
3 children

Pottstown-2:

23

Shella Dugan
610-310-9339
5 children

Kathleen Smith
610-653-5008
3 children

Patricia Mazoue
610-570-6117
3 children

Jacqueline Velez
484-948-8271
1 child

Jaclyn Butts
484-250-1602
1 child

Desiree McClune
484-942-4311
3 children

Ashley Kretzman
484-524-2903
2 children

Amber McClune
484-942-6095
2 children

Lisa Diaz
484-624-8139
3 children

Pottstown-3:

23

Jamie Sanders
484-300-1234
4 children

Colleen Jones
267-579-6533
2 children

Yasmeen Brown
484-466-1159
3 children

Randi Carpenter
484-374-3009
4 children

Heather Cooper
484-524-5356
1 child

Amanda Saylor
484-941-1772
1 child

Stacy Page
484-366-5320
2 children

Riki Walton
610-818-7939
2 children

Christine Hunter
215-740-7523
2 children

Indira Diaz
267-602-4656
2 children

Montgomery County Office of Children and Youth
364 King St., 2nd Floor
Pottstown, PA 19464
Sarah Batipps
610-327-1588 x 4235

18

Danyell C.
5 children
No phone

April S.
610-327-2839
4 children

Carla O.
484-688-4631
5 children

Shakita J.
484-366-9464
2 children

Shyrein J.
484-300-0867
2 children

Montgomery Early Learning Center (Pre-K Counts, Ricketts, MELC/Pottstown)
MELC/Pottstown Center
150 N. Hanover St.
Pottstown, PA 19464
Karla Esposito
610-326-9177 or 484-624-1175 (cell)

Pre-K Counts:

31

Klanna Dorsey
484-250-2131
4 children

Requita Elliott
484-366-5216
4 children

Carrie Heverly
484-948-9606
4 children

David Jimenez
610-680-8149
2 children

Casandra Johnson
484-366-9900
5 children

Erlinda Posa
201-478-2958
3 children

Kenya Small
484-624-3315
2 children

Kimyda Branch
267-670-6481
4 children

Tisha Young
267-973-1270
3 children

Ricketts:

25

Nicole Frisco
610-476-9547
3 children

Reyna Guardado
732-621-0466
2 children

Lorenza Villanueva
484-302-6253
1 child

Kalinda Tinson
484-300-6570
2 children

Margarita Torres
610-323-2557
5 children

Ovilia Gomez
484-338-6429
4 children

Dinora Guardado
732-543-6717
2 children

Leslie Brown
610-323-6763
3 children

Jared Walker
484-661-3113
1 child

Tondelayo Brooks
610-323-4530
2 children

MELC/Pottstown:

21

Shyreice Joseph
610-323-4301
1 child

Reyna Izquierdo
610-624-1855
1 child

Adria Henry
267-438-1553
2 children

Sholanda Charles
610-970-9883
5 children

Fatisha Quainoo
610-680-8041
1 child

Michelle Mitchell
484-945-3240
3 children

Tiffany Poznanski
484-524-8787
2 children

Na'Imah Rhodes
484-300-1568
3 children

Howard Williams
484-524-8269
3 children

North Coventry Food Pantry
148 W. Main St.
Pottstown, PA 19465
Ginny Wade
610-326-5659 or 484-614-0190

25

Tina Hood
484-614-0068
2 children

Holly Feldman
610-310-8771
6 children

Oliver Martinez
610-220-9373
2 children

Mark Dushanko
484-624-3369
2 children

Peter Davis
610-469-0758
3 children

Tim Oister
484-524-8955
3 children

Wendy Ripley
484-363-1052
1 child

Margie Cotton
610-323-0773
2 children

Tara Miller
610-937-0865
1 child

Tracy McLaughlin
484-624-5333
3 children

Owen J. Roberts School District
Administration Building
901 Ridge Rd.
Pottstown, PA 19465
Elena Tobin/Sue Grasoff
610-469-5170 / 610-469-5184

22

Kim Scram
610-342-6964
4 children

Jen Ronto
484-300-5026
3 children

DiRocco family
484-318-0389
1 child

Golden family
573-338-8480
2 children

Italiano family
484-716-7302
2 children

Jennifer Dziob
484-938-7977
2 children

Russell Black
484-792-1636
2 children

Brenca Haugland
610-999-1362
2 children

Elena Kwiatowski
267-650-2071
3 children

Jada Watkins
484-300-0112
1 child

Park Spring Apartments
1800 Park Spring Blvd.
Spring City, PA 19475
Ed Rodriguez
610-948-6203

22

Deja Claiborne
No phone
2 children

Belinda Roberts
No phone
3 children

Jaime Gathercole
267-222-0533
1 child

Tamsin Doughty
484-369-3413
3 children

Shantay Baker
215-758-1905
1 child

Beatrice Cooper
484-369-8795
2 children

Sherry Thornton
No phone
4 children

Chela Mitchell
484-363-9735
3 children

Zwana Graham
No Phone
1 child

Wanda and Kenyatta Gibson
610-990-1626
2 children

Phoenixville Hospital
140 Nutt Rd.
Phoenixville, PA 19460
Kathy Wilson
610-983-1415

16

Tasia Chuko
484-949-4623
1 child

13

Tiffany or Charles Nelligan
610-308-8838 or 610-812-5182
1 child

Laura Kramer
484-932-8195 or 215-869-2705
2 children

Amanda Pike
610-482-2282
3 children

Jayme Doyle
610-587-5278
1 child

Shannon McIlveen
484-638-9067
1 child

Elizabeth Nyce
484-632-1442
7 children

Pottstown Cluster of Religious Communities **32**
57 N. Franklin St.
Pottstown PA 19464
Barbara Wilhelmy
610-970-5995

Vanisha Daniels
267-766-1308
4 children

Jackie Jacobs
484-624-5085
1 child

Sandra Sanchez
215-459-2038
4 children

Barbara Andrews
484-624-1385
1 child

Jennie Fishburn
610-930-8934
4 children

Christina Colegrove
610-368-5528
3 children

Tamyra Hamilton
347-515-7518
2 children

Adrienne Moore
267-232-7237
5 children

Carolyn Vanderslice
609-310-8261
5 children

Regina Rich
484-369-1951
3 children

Pottstown Family Center
1976 E. High St. (across from the VNA)
Suite 203
Pottstown, PA 19464
Jessica McCartin
610-326-1610 x 243

29

Megan Peck
610-960-7296
1 child

Cindy Webb
484-767-0661
5 children

Tara Bumbarger
267-287-6189
4 children

Tina Buckner
484-688-6889
4 children

Sean Kellman
610-327-4306 or 484-300-0357
2 children

Holly Wagner
484-948-1722
3 children

Tracy Olomua
215-881-5976
2 children

Richard Soos
484-300-4346
2 children

Nathan Hamilton
267-736-9425
5 children

Meghan McGinnis
610-308-5602
1 child

Pottstown School District Admin. Annex **29**
940 N. Franklin St.
Pottstown PA 19464
Holly Lee
610-970-6691

Sherri Horchak
484-524-8803
1 child

Darryl and Tara Brothers
484-949-9097
3 children

Tamara Rogers
484-524-8468
3 children

Charlet Licwinko
484-366-9553
2 children

Kaleria Patterson
484-363-3914
2 children

Kathy Migala
484-624-4367
3 children

Keith and Kimberly Lenhardt
484-300-3267
3 children

Thomas Kelley and Jackie Rothenberger
610-802-5839
4 children

Davietta Reed
267-650-0425
6 children

Consuela Starks
484-300-4462
2 children

Rolling Hills Apartments **26**
2120 Buchert Road
Pottstown, PA 19464
Laura English
610-323-5130 x 17

Tameka Slocum
267-980-7625
2 children

Corrine Ellis
1-913-687-6111
4 children

Raquel Coleman
610-323-5130
3 children

Diane Briggs
484-636-4371
2 children

Beverly Matthews
267-581-0530
1 child

Monica Davis
610-323-2426
3 children

Nayketa Dodd
267-880-7728
4 children

Diana Flahn
484-300-5035
2 children

Denise Montague
484-366-9364
1 child

Daniel Clark
No phone
4 children

Women's Center of Montgomery County 22
1800 E. High St., Suite 350
Pottstown PA 19464
Kristine Wickward
610-970-7364

Amaris Acevedo
484-402-2127
1 child

Tammy B.
484-688-4714
2 children

Mandy C.
484-624-5825
2 children

Cheryl Dials
267-622-5190
1 child

Judy McGinn
610-326-8119
2 children

Takia Paschall
610-326-4649
5 children

Stephanie O'Connor
484-945-0229
5 children

Denise Stepsie
484-721-0347
2 children

Kayana Stutzman
484-949-8380
2 children

Boyertown School District 2
Cindi Bartholomew
610-369-7492

Chrissy DeAgostino
484-949-1755
2 children

Ringling Rocks Elementary School 3
Karen Martin
610-323-0903

Renee and Roger Feldman
610-323-0903
3 children

Heart of God Family Worship Center 13
Beech and Hanover Sts.
Pottstown, Pa 19464
Pastor Linda Anthony
610-802-1000

Laura Venezia
484-977-0305
5 children

Shena Beasley
484-300-1336
2 children

Jessica Warren
443-608-0701
2 children

Kirk Dixon
484-274-7645
2 children

Raeshelle SalataJohnson
610-323-8118
2 children

THE MERCURY

Publishers of The Mercury and The Penny Pincher

PROOF OF PUBLICATION OF NOTICE

Under Act No. 587, Approved May 6, 1929

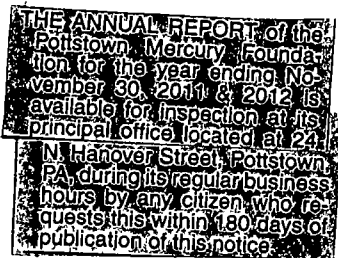
STATE OF PENNSYLVANIA
COUNTY OF MONTGOMERY SS:

Patricia McKelvey, of The Mercury, of the County and State aforesaid, being duly sworn, deposes and says that THE MERCURY, a newspaper of general circulation published at 24 N. Hanover Street, Borough of Pottstown, County and State aforesaid, was established September 29, 1931 since which time, THE MERCURY has been regularly issued in said County, and that the printed notice of publication attached hereto is exactly the same as printed and published in the regular editions and issues of the said THE MERCURY on the following dates; viz.

March 8, 2013

Affiant further deposes that he/she is duly authorized by THE MERCURY, a newspaper of general circulation, to verify the foregoing statement under oath, and affiant is not interested in the subject matter of the aforesaid notice of advertisement, and that all allegations in the foregoing statements as to time, place and character of publication are true.

Copy of Notice or Publication



Patricia McKelvey
Patricia McKelvey, Ad Sales Manager

Sworn to and subscribed before me this 13th

day of March, 2013.

Denise N. Diehl
Notary Public

My Commission Expires: _____

NOTARIAL SEAL
DENISE N. DIEHL, Notary Public
City of Pottstown, Montgomery County
My Commission Expires April 30, 2015