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Form **990-PF**

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

OMB No 1545-0052

**2009**

Department of the Treasury  
Internal Revenue Service (77)

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

For calendar year 2009, or tax year beginning , 2009, and ending , 20

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

|                                                                                                                                                                                                                                                          |                                                                                                                                                         |                                                                                                                                                                                                                                                                                 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Use the IRS label. Otherwise, print or type. See Specific Instructions.</b>                                                                                                                                                                           | Name of foundation<br><b>ISRAEL HENRY BEREN CHARITABLE TRUST</b>                                                                                        | <b>A Employer identification number</b><br>48-6337836                                                                                                                                                                                                                           |
|                                                                                                                                                                                                                                                          | Number and street (or P O box number if mail is not delivered to street address) Room/suite<br><b>ROBERT M. BEREN, TRUSTEE P.O. BOX 20380</b>           | <b>B Telephone number (see page 10 of the instructions)</b><br>(316) 265-3311                                                                                                                                                                                                   |
|                                                                                                                                                                                                                                                          | City or town, state, and ZIP code<br><b>WICHITA KS 67208</b>                                                                                            | <b>C</b> If exemption application is pending, check here <input type="checkbox"/><br><b>D 1.</b> Foreign organizations, check here <input type="checkbox"/><br><b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> |
| <b>H</b> Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation<br><input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation |                                                                                                                                                         | <b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/><br><b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>                                 |
| <b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <b>46,145,032</b>                                                                                                                                         | <b>J</b> Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual<br><input type="checkbox"/> Other (specify) _____ |                                                                                                                                                                                                                                                                                 |

| <b>Part I Analysis of Revenue and Expenses</b> (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions)) |           | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|------------------------------------|---------------------------|-------------------------|-------------------------------------------------------------|
| <b>1</b> Contributions, gifts, grants, etc., received (attach schedule)                                                                                                                  |           |                                    |                           |                         |                                                             |
| <b>2</b> Check <input type="checkbox"/> if the foundation is not required to attach Sch. B                                                                                               |           |                                    |                           |                         |                                                             |
| <b>3</b> Interest on savings and temporary cash investments                                                                                                                              |           | 225,253                            | 225,253                   |                         |                                                             |
| <b>4</b> Dividends and interest from securities                                                                                                                                          |           | 773,819                            | 773,819                   |                         |                                                             |
| <b>5a</b> Gross rents                                                                                                                                                                    |           |                                    |                           |                         |                                                             |
| <b>b</b> Net rental income or (loss)                                                                                                                                                     |           |                                    |                           |                         |                                                             |
| <b>6a</b> Net gain or (loss) from sale of assets not on line 10                                                                                                                          |           | (635,692)                          | SCHEDULE 3                |                         |                                                             |
| <b>b</b> Gross sales price for all assets on line 6a                                                                                                                                     | 3,874,324 |                                    |                           |                         |                                                             |
| <b>7</b> Capital gain net income (from Part IV, line 2)                                                                                                                                  |           |                                    | 0                         |                         |                                                             |
| <b>8</b> Net short-term capital gain                                                                                                                                                     |           |                                    |                           |                         |                                                             |
| <b>9</b> Income modifications                                                                                                                                                            |           |                                    |                           |                         |                                                             |
| <b>10a</b> Gross sales less returns and allowances                                                                                                                                       |           |                                    |                           |                         |                                                             |
| <b>b</b> Less: Cost of goods sold                                                                                                                                                        |           |                                    |                           |                         |                                                             |
| <b>c</b> Gross profit or (loss) (attach schedule)                                                                                                                                        |           | 0                                  |                           |                         |                                                             |
| <b>11</b> Other income (attach schedule) SEE SCH 1                                                                                                                                       |           | 54,469                             | 54,469                    |                         |                                                             |
| <b>12</b> Total. Add lines 1 through 11                                                                                                                                                  |           | 417,849                            | 1,053,541                 | 0                       |                                                             |
| <b>13</b> Compensation of officers, directors, trustees, etc.                                                                                                                            |           |                                    |                           |                         |                                                             |
| <b>14</b> Other employee salaries and wages                                                                                                                                              |           |                                    |                           |                         |                                                             |
| <b>15</b> Pension plans, employee benefits                                                                                                                                               |           |                                    |                           |                         |                                                             |
| <b>16a</b> Legal fees (attach schedule) SEE SCH 1                                                                                                                                        |           | 6,064                              | 6,064                     |                         |                                                             |
| <b>b</b> Accounting fees (attach schedule) SEE SCH 1                                                                                                                                     |           | 1,295                              | 1,295                     |                         |                                                             |
| <b>c</b> Other professional fees (attach schedule) SEE SCH 1                                                                                                                             |           | 72,070                             | 72,070                    |                         |                                                             |
| <b>17</b> Interest SEE SCH 1                                                                                                                                                             |           |                                    |                           |                         |                                                             |
| <b>18</b> Taxes (attach schedule) (see page 14 of the instructions)                                                                                                                      |           | 18,247                             | 3,247                     |                         |                                                             |
| <b>19</b> Depreciation (attach schedule) and depletion                                                                                                                                   |           |                                    |                           |                         |                                                             |
| <b>20</b> Occupancy                                                                                                                                                                      |           |                                    |                           |                         |                                                             |
| <b>21</b> Travel, conferences, and meetings                                                                                                                                              |           |                                    |                           |                         |                                                             |
| <b>22</b> Printing and publications                                                                                                                                                      |           |                                    |                           |                         |                                                             |
| <b>23</b> Other expenses (attach schedule) SEE SCH 1                                                                                                                                     |           | 836                                | 836                       |                         |                                                             |
| <b>24</b> Total operating and administrative expenses. Add lines 13 through 23                                                                                                           |           | 98,512                             | 83,512                    | 0                       | 0                                                           |
| <b>25</b> Contributions, gifts, grants paid                                                                                                                                              |           | 1,470,000                          |                           |                         | 1,470,000                                                   |
| <b>26</b> Total expenses and disbursements. Add lines 24 and 25                                                                                                                          |           | 1,568,512                          | 83,512                    | 0                       | 1,470,000                                                   |
| <b>27</b> Subtract line 26 from line 12:                                                                                                                                                 |           |                                    |                           |                         |                                                             |
| <b>a</b> Excess of revenue over expenses and disbursements                                                                                                                               |           | (1,150,663)                        |                           |                         |                                                             |
| <b>b</b> Net investment income (if negative, enter -0-)                                                                                                                                  |           |                                    | 970,029                   |                         |                                                             |
| <b>c</b> Adjusted net income (if negative, enter -0-)                                                                                                                                    |           |                                    |                           | 0                       |                                                             |

SCANNED NOV 26 2009 Revenue Operating and Administrative Expenses



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| <b>Part II Balance Sheets</b> Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions) |                                                                                                                                                           | Beginning of year | End of year    |                       |
|--------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|----------------|-----------------------|
|                                                                                                                                                  |                                                                                                                                                           | (a) Book Value    | (b) Book Value | (c) Fair Market Value |
| <b>Assets</b>                                                                                                                                    | <b>1</b> Cash—non-interest-bearing . . . . .                                                                                                              | 11,128,033        | 10,993,813     | 10,993,813            |
|                                                                                                                                                  | <b>2</b> Savings and temporary cash investments . . . . .                                                                                                 |                   |                |                       |
|                                                                                                                                                  | <b>3</b> Accounts receivable ▶ . . . . .                                                                                                                  |                   |                |                       |
|                                                                                                                                                  | Less: allowance for doubtful accounts ▶ . . . . .                                                                                                         |                   |                |                       |
|                                                                                                                                                  | <b>4</b> Pledges receivable ▶ . . . . .                                                                                                                   |                   |                |                       |
|                                                                                                                                                  | Less: allowance for doubtful accounts ▶ . . . . .                                                                                                         |                   |                |                       |
|                                                                                                                                                  | <b>5</b> Grants receivable . . . . .                                                                                                                      |                   |                |                       |
|                                                                                                                                                  | <b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions) . . . . . |                   |                |                       |
|                                                                                                                                                  | <b>7</b> Other notes and loans receivable (attach schedule) ▶ . . . . .                                                                                   |                   |                |                       |
|                                                                                                                                                  | Less: allowance for doubtful accounts ▶ . . . . .                                                                                                         |                   |                |                       |
|                                                                                                                                                  | <b>8</b> Inventories for sale or use . . . . .                                                                                                            |                   |                |                       |
|                                                                                                                                                  | <b>9</b> Prepaid expenses and deferred charges . . . . .                                                                                                  |                   |                |                       |
|                                                                                                                                                  | <b>10a</b> Investments—U.S. and state government obligations (attach schedule) . . . . .                                                                  | 1,487,563         | 449,941        | 449,996               |
|                                                                                                                                                  | <b>b</b> Investments—corporate stock (attach schedule) . . . . .                                                                                          | 19,193,296        | 17,536,601     | 25,806,810            |
|                                                                                                                                                  | <b>c</b> Investments—corporate bonds (attach schedule) . . . . .                                                                                          | 115,125           | 1,903,754      | 2,166,217             |
|                                                                                                                                                  | <b>11</b> Investments—land, buildings, and equipment, basis ▶ . . . . .                                                                                   |                   |                |                       |
| Less: accumulated depreciation (attach schedule) ▶ . . . . .                                                                                     |                                                                                                                                                           |                   |                |                       |
| <b>12</b> Investments—mortgage loans . . . . .                                                                                                   |                                                                                                                                                           |                   |                |                       |
| <b>13</b> Investments—other (attach schedule) . . . . .                                                                                          | 8,887,666                                                                                                                                                 | 8,781,474         | 6,728,196      |                       |
| <b>14</b> Land, buildings, and equipment: basis ▶ . . . . .                                                                                      |                                                                                                                                                           |                   |                |                       |
| Less: accumulated depreciation (attach schedule) ▶ . . . . .                                                                                     |                                                                                                                                                           |                   |                |                       |
| <b>15</b> Other assets (describe ▶ PURCHASED INTEREST . . . . .)                                                                                 | 4,563                                                                                                                                                     | 0                 | 0              |                       |
| <b>16 Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I) . . . . .                                  | 40,816,246                                                                                                                                                | 39,665,583        | 46,145,032     |                       |
| <b>Liabilities</b>                                                                                                                               | <b>17</b> Accounts payable and accrued expenses . . . . .                                                                                                 |                   |                |                       |
|                                                                                                                                                  | <b>18</b> Grants payable . . . . .                                                                                                                        |                   |                |                       |
|                                                                                                                                                  | <b>19</b> Deferred revenue . . . . .                                                                                                                      |                   |                |                       |
|                                                                                                                                                  | <b>20</b> Loans from officers, directors, trustees, and other disqualified persons . . . . .                                                              |                   |                |                       |
|                                                                                                                                                  | <b>21</b> Mortgages and other notes payable (attach schedule) . . . . .                                                                                   |                   |                |                       |
|                                                                                                                                                  | <b>22</b> Other liabilities (describe ▶ . . . . .)                                                                                                        |                   |                |                       |
|                                                                                                                                                  | <b>23 Total liabilities</b> (add lines 17 through 22) . . . . .                                                                                           | 0                 | 0              |                       |
| <b>Net Assets or Fund Balances</b>                                                                                                               | <b>Foundations that follow SFAS 117, check here ▶</b> <input type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>               |                   |                |                       |
|                                                                                                                                                  | <b>24</b> Unrestricted . . . . .                                                                                                                          |                   |                |                       |
|                                                                                                                                                  | <b>25</b> Temporarily restricted . . . . .                                                                                                                |                   |                |                       |
|                                                                                                                                                  | <b>26</b> Permanently restricted . . . . .                                                                                                                |                   |                |                       |
|                                                                                                                                                  | <b>Foundations that do not follow SFAS 117, check here ▶</b> <input type="checkbox"/> <b>and complete lines 27 through 31.</b>                            |                   |                |                       |
|                                                                                                                                                  | <b>27</b> Capital stock, trust principal, or current funds . . . . .                                                                                      |                   |                |                       |
|                                                                                                                                                  | <b>28</b> Paid-in or capital surplus, or land, bldg, and equipment fund . . . . .                                                                         |                   |                |                       |
|                                                                                                                                                  | <b>29</b> Retained earnings, accumulated income, endowment, or other funds . . . . .                                                                      | 40,816,246        | 39,665,583     |                       |
| <b>30 Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .                                                          | 40,816,246                                                                                                                                                | 39,665,583        |                |                       |
| <b>31 Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .                                             | 40,816,246                                                                                                                                                | 39,665,583        |                |                       |

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

|                                                                                                                                                                             |          |             |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-------------|
| <b>1</b> 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) . . . . . | <b>1</b> | 40,816,246  |
| <b>2</b> Enter amount from Part I, line 27a . . . . .                                                                                                                       | <b>2</b> | (1,150,663) |
| <b>3</b> Other increases not included in line 2 (itemize) ▶ . . . . .                                                                                                       | <b>3</b> |             |
| <b>4</b> Add lines 1, 2, and 3 . . . . .                                                                                                                                    | <b>4</b> | 39,665,583  |
| <b>5</b> Decreases not included in line 2 (itemize) ▶ . . . . .                                                                                                             | <b>5</b> |             |
| <b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .                                                      | <b>6</b> | 39,665,583  |

**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<br>P—Purchase<br>D—Donation    | (c) Date acquired<br>(mo., day, yr.)                                                            | (d) Date sold<br>(mo., day, yr.) |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------------|----------------------------------|
| <b>1a</b> SEE SCHEDULE 3                                                                                                                                                                                                         |                                            | P                                               | VARIOUS                                                                                         | 2009                             |
| <b>b</b>                                                                                                                                                                                                                         |                                            |                                                 |                                                                                                 |                                  |
| <b>c</b>                                                                                                                                                                                                                         |                                            |                                                 |                                                                                                 |                                  |
| <b>d</b>                                                                                                                                                                                                                         |                                            |                                                 |                                                                                                 |                                  |
| <b>e</b>                                                                                                                                                                                                                         |                                            |                                                 |                                                                                                 |                                  |
| (e) Gross sales price                                                                                                                                                                                                            | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g)                                                    |                                  |
| <b>a</b> 3,874,324                                                                                                                                                                                                               |                                            | 4,510,016                                       | (635,692)                                                                                       |                                  |
| <b>b</b>                                                                                                                                                                                                                         |                                            |                                                 |                                                                                                 |                                  |
| <b>c</b>                                                                                                                                                                                                                         |                                            |                                                 |                                                                                                 |                                  |
| <b>d</b>                                                                                                                                                                                                                         |                                            |                                                 |                                                                                                 |                                  |
| <b>e</b>                                                                                                                                                                                                                         |                                            |                                                 |                                                                                                 |                                  |
| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69                                                                                                                                      |                                            |                                                 | (i) Gains (Col. (h) gain minus<br>col. (k), but not less than -0-) or<br>Losses (from col. (h)) |                                  |
| (i) FMV as of 12/31/69                                                                                                                                                                                                           | (j) Adjusted basis<br>as of 12/31/69       | (k) Excess of col. (i)<br>over col. (j), if any |                                                                                                 |                                  |
| <b>a</b>                                                                                                                                                                                                                         |                                            |                                                 |                                                                                                 |                                  |
| <b>b</b>                                                                                                                                                                                                                         |                                            |                                                 |                                                                                                 |                                  |
| <b>c</b>                                                                                                                                                                                                                         |                                            |                                                 |                                                                                                 |                                  |
| <b>d</b>                                                                                                                                                                                                                         |                                            |                                                 |                                                                                                 |                                  |
| <b>e</b>                                                                                                                                                                                                                         |                                            |                                                 |                                                                                                 |                                  |
| <b>2</b> Capital gain net income or (net capital loss) $\left\{ \begin{array}{l} \text{If gain, also enter in Part I, line 7} \\ \text{If (loss), enter -0- in Part I, line 7} \end{array} \right\}$                             |                                            | <b>2</b>                                        | (635,692)                                                                                       |                                  |
| <b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):<br>If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions).<br>If (loss), enter -0- in Part I, line 8 |                                            | <b>3</b>                                        |                                                                                                 |                                  |

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

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

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

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

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

| (a) Base period years<br>Calendar year (or tax year beginning in) | (b) Adjusted qualifying distributions | (c) Net value of noncharitable-use assets | (d) Distribution ratio<br>(col. (b) divided by col. (c)) |
|-------------------------------------------------------------------|---------------------------------------|-------------------------------------------|----------------------------------------------------------|
| 2008                                                              | 1,162,500                             | 47,207,083                                | 0.0246                                                   |
| 2007                                                              | 2,548,782                             | 52,855,717                                | 0.0482                                                   |
| 2006                                                              | 2,764,186                             | 48,639,787                                | 0.0568                                                   |
| 2005                                                              | 2,118,776                             | 47,259,320                                | 0.0448                                                   |
| 2004                                                              | 2,325,170                             | 47,341,338                                | 0.0491                                                   |

  

|                                                                                                                                                                                     |          |            |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|------------|
| <b>2</b> Total of line 1, column (d)                                                                                                                                                | <b>2</b> | 0.2235     |
| <b>3</b> 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 | <b>3</b> | .0447      |
| <b>4</b> Enter the net value of noncharitable-use assets for 2009 from Part X, line 5                                                                                               | <b>4</b> | 42,081,787 |
| <b>5</b> Multiply line 4 by line 3                                                                                                                                                  | <b>5</b> | 1,881,056  |
| <b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)                                                                                                                 | <b>6</b> | 9,700      |
| <b>7</b> Add lines 5 and 6                                                                                                                                                          | <b>7</b> | 1,890,756  |
| <b>8</b> Enter qualifying distributions from Part XII, line 4                                                                                                                       | <b>8</b> | 1,470,000  |

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

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

|    |                                                                                                                                                                                                                                 |    |        |
|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|--------|
| 1a | Exempt operating foundations described in section 4940(d)(2), check here <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  |        |
| 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  | 19,400 |
| 3  | Add lines 1 and 2                                                                                                                                                                                                               | 3  | 19,400 |
| 4  | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)                                                                                                                     | 4  |        |
| 5  | <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-                                                                                                                                  | 5  | 19,400 |
| 6  | Credits/Payments:                                                                                                                                                                                                               |    |        |
| a  | 2009 estimated tax payments and 2008 overpayment credited to 2009                                                                                                                                                               | 6a | 30,986 |
| 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  | 30,986 |
| 8  | Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached                                                                                                               | 8  |        |
| 9  | <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter amount owed                                                                                                                                            | 9  | 0      |
| 10 | <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the amount overpaid                                                                                                                                | 10 | 11,586 |
| 11 | Enter the amount of line 10 to be: <b>Credited to 2010 estimated tax</b> 11,586 <b>Refunded</b>                                                                                                                                 | 11 | 0      |

**Part VII-A Statements Regarding Activities**

|                                                                                                                                                                                                      | Yes | No |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 1a                                                                                                                                                                                                   |     | X  |
| b                                                                                                                                                                                                    |     | X  |
| <i>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.</i> |     |    |
| c                                                                                                                                                                                                    |     | X  |
| d                                                                                                                                                                                                    |     |    |
| e                                                                                                                                                                                                    |     |    |
| 2                                                                                                                                                                                                    |     | X  |
| 3                                                                                                                                                                                                    |     | X  |
| 4a                                                                                                                                                                                                   |     | X  |
| 4b                                                                                                                                                                                                   |     |    |
| 5                                                                                                                                                                                                    |     | X  |
| 6                                                                                                                                                                                                    | X   |    |
| 7                                                                                                                                                                                                    | X   |    |
| 8a                                                                                                                                                                                                   |     |    |
| 8b                                                                                                                                                                                                   | X   |    |
| 9                                                                                                                                                                                                    |     | X  |
| 10                                                                                                                                                                                                   |     | 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 page 20 of the instructions) | 11 |   | X |
| 12 | Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?                                                                                  | 12 |   | X |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application?<br>Website address ▶                                                               | 13 | X |   |
| 14 | The books are in care of ▶ THE FOUNDATION Telephone no. ▶ 316-265-3311<br>Located at ▶ WICHITA, KS ZIP+4 ▶ 67206                                                                                       |    |   |   |
| 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                 |    |   |   |

**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 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <b>1a</b> During the year did the foundation (either directly or indirectly):                                                                                                                                                                                                                                                                                                                                                                                                                            |     |    |
| (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                                               |     |    |
| (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                       |     |    |
| (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input 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>b</b> If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>                                                                                                                                               | 1b  |    |
| <b>c</b> Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?                                                                                                                                                                                                                                                                                                         | 1c  | X  |
| <b>2</b> Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):                                                                                                                                                                                                                                                                                                                  |     |    |
| <b>a</b> At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input type="checkbox"/> No<br>If "Yes," list the years ▶ 20 , 20 , 20 , 20                                                                                                                                                                                                                                      |     |    |
| <b>b</b> Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions.)                                                                                                                                                                          | 2b  |    |
| <b>c</b> If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20 , 20 , 20 , 20                                                                                                                                                                                                                                                                                                                                                            |     |    |
| <b>3a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                 |     |    |
| <b>b</b> If "Yes," did it have excess business holdings in 2009 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 2009.) | 3b  |    |
| <b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?                                                                                                                                                                                                                                                                                                                                                                                | 4a  | X  |
| <b>b</b> Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?                                                                                                                                                                                                                                                               | 4b  | X  |

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?  Yes  No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?  Yes  No

(3) Provide a grant to an individual for travel, study, or other similar purposes?  Yes  No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions).  Yes  No

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

**b** If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here  **5b**

**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?  Yes  No  
If "Yes," attach the statement required by Regulations section 53.4945–5(d).

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

**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  Yes  No  
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?  Yes  No **7b**

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

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

| (a) Name and address                                                 | (b) Title, and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|----------------------------------------------------------------------|-----------------------------------------------------------|-------------------------------------------|-----------------------------------------------------------------------|---------------------------------------|
| ROBERT M. BEREN<br>13840 LE MANS WAY<br>PALM BEACH GARDENS, FL 33410 | TRUSTEE-2                                                 | NONE                                      | NONE                                                                  | NONE                                  |
|                                                                      |                                                           |                                           |                                                                       |                                       |
|                                                                      |                                                           |                                           |                                                                       |                                       |
|                                                                      |                                                           |                                           |                                                                       |                                       |

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

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

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

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

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

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

Total number of others receiving over \$50,000 for professional services . . . . . **▶**

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

| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc. | Expenses |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| 1                                                                                                                                                                                                                                                      |          |
| 2                                                                                                                                                                                                                                                      |          |
| 3                                                                                                                                                                                                                                                      |          |
| 4                                                                                                                                                                                                                                                      |          |

**Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)**

| Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 | Amount   |
|------------------------------------------------------------------------------------------------------------------|----------|
| 1 NONE                                                                                                           |          |
| 2                                                                                                                |          |
| All other program-related investments. See page 24 of the instructions                                           |          |
| 3                                                                                                                |          |
| <b>Total.</b> Add lines 1 through 3 . . . . . <b>▶</b>                                                           | <b>0</b> |



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

|          |                                                                                                                       |           |            |
|----------|-----------------------------------------------------------------------------------------------------------------------|-----------|------------|
| <b>1</b> | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:           |           |            |
| <b>a</b> | Average monthly fair market value of securities                                                                       | <b>1a</b> | 25,357,724 |
| <b>b</b> | Average of monthly cash balances                                                                                      | <b>1b</b> | 11,908,192 |
| <b>c</b> | Fair market value of all other assets (see page 24 of the instructions)                                               | <b>1c</b> | 5,456,710  |
| <b>d</b> | <b>Total</b> (add lines 1a, b, and c)                                                                                 | <b>1d</b> | 42,722,626 |
| <b>e</b> | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)             | <b>1e</b> |            |
| <b>2</b> | Acquisition indebtedness applicable to line 1 assets                                                                  | <b>2</b>  |            |
| <b>3</b> | Subtract line 2 from line 1d                                                                                          | <b>3</b>  | 42,722,626 |
| <b>4</b> | Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see page 25 of the instructions) | <b>4</b>  | 640,839    |
| <b>5</b> | <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4           | <b>5</b>  | 42,081,787 |
| <b>6</b> | <b>Minimum investment return.</b> Enter 5% of line 5                                                                  | <b>6</b>  | 2,104,089  |

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

|           |                                                                                                           |           |           |
|-----------|-----------------------------------------------------------------------------------------------------------|-----------|-----------|
| <b>1</b>  | Minimum investment return from Part X, line 6                                                             | <b>1</b>  | 2,104,089 |
| <b>2a</b> | Tax on investment income for 2009 from Part VI, line 5                                                    | <b>2a</b> | 19,400    |
| <b>b</b>  | Income tax for 2009. (This does not include the tax from Part VI)                                         | <b>2b</b> |           |
| <b>c</b>  | Add lines 2a and 2b                                                                                       | <b>2c</b> | 19,400    |
| <b>3</b>  | <b>Distributable amount before adjustments.</b> Subtract line 2c from line 1                              | <b>3</b>  | 2,084,689 |
| <b>4</b>  | Recoveries of amounts treated as qualifying distributions                                                 | <b>4</b>  |           |
| <b>5</b>  | Add lines 3 and 4                                                                                         | <b>5</b>  | 2,084,689 |
| <b>6</b>  | Deduction from distributable amount (see page 25 of the instructions)                                     | <b>6</b>  |           |
| <b>7</b>  | <b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | <b>7</b>  | 2,084,689 |

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

|          |                                                                                                                                                                     |           |           |
|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|-----------|
| <b>1</b> | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:                                                                          |           |           |
| <b>a</b> | Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26                                                                                         | <b>1a</b> | 1,470,000 |
| <b>b</b> | Program-related investments—total from Part IX-B                                                                                                                    | <b>1b</b> |           |
| <b>2</b> | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes                                                           | <b>2</b>  |           |
| <b>3</b> | Amounts set aside for specific charitable projects that satisfy the:                                                                                                |           |           |
| <b>a</b> | Suitability test (prior IRS approval required)                                                                                                                      | <b>3a</b> |           |
| <b>b</b> | Cash distribution test (attach the required schedule)                                                                                                               | <b>3b</b> |           |
| <b>4</b> | <b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4                                                   | <b>4</b>  | 1,470,000 |
| <b>5</b> | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions) | <b>5</b>  |           |
| <b>6</b> | <b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4                                                                                               | <b>6</b>  | 1,470,000 |

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

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

|                                                                                                                                                                            | (a)<br>Corpus | (b)<br>Years prior to 2008 | (c)<br>2008 | (d)<br>2009 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2009 from Part XI, line 7                                                                                                                       |               |                            |             | 2,084,689   |
| 2 Undistributed income, if any, as of the end of 2009:                                                                                                                     |               |                            |             |             |
| a Enter amount for 2008 only                                                                                                                                               |               |                            | 928,794     |             |
| b Total for prior years: 20____, 20____, 20____                                                                                                                            |               |                            |             |             |
| 3 Excess distributions carryover, if any, to 2009:                                                                                                                         |               |                            |             |             |
| a From 2004                                                                                                                                                                |               |                            |             |             |
| b From 2005                                                                                                                                                                |               |                            |             |             |
| c From 2006                                                                                                                                                                |               |                            |             |             |
| d From 2007                                                                                                                                                                |               |                            |             |             |
| e From 2008                                                                                                                                                                |               |                            |             |             |
| f Total of lines 3a through e                                                                                                                                              | 0             |                            |             |             |
| 4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 1,470,000                                                                                                   |               |                            |             |             |
| a Applied to 2008, but not more than line 2a                                                                                                                               |               |                            | 928,794     |             |
| b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)                                                                       |               |                            |             |             |
| c Treated as distributions out of corpus (Election required—see page 26 of the instructions)                                                                               |               |                            |             |             |
| d Applied to 2009 distributable amount                                                                                                                                     |               |                            |             | 541,206     |
| e Remaining amount distributed out of corpus                                                                                                                               |               |                            |             |             |
| 5 Excess distributions carryover applied to 2009<br>(If an amount appears in column (d), the same amount must be shown in column (a).)                                     |               |                            |             |             |
| 6 Enter the net total of each column as indicated below:                                                                                                                   |               |                            |             |             |
| a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5                                                                                                                        | 0             |                            |             |             |
| b Prior years' undistributed income. Subtract line 4b from line 2b                                                                                                         |               | 0                          |             |             |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed |               |                            |             |             |
| d Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions                                                                                            |               | 0                          |             |             |
| e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions                                                             |               |                            | 0           |             |
| f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010                                                              |               |                            |             | 1,543,483   |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)                   |               |                            |             |             |
| 8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)                                                               |               |                            |             |             |
| 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a                                                                                              | 0             |                            |             |             |
| 10 Analysis of line 9:                                                                                                                                                     |               |                            |             |             |
| a Excess from 2005                                                                                                                                                         |               |                            |             |             |
| b Excess from 2006                                                                                                                                                         |               |                            |             |             |
| c Excess from 2007                                                                                                                                                         |               |                            |             |             |
| d Excess from 2008                                                                                                                                                         |               |                            |             |             |
| e Excess from 2009                                                                                                                                                         |               |                            |             |             |

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

- 1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling . . . . . ▶
- b** Check box to indicate whether the foundation is a private operating foundation described in section  4942(j)(3) or  4942(j)(5)

|                                                                                                                                                                    | Tax year |          | Prior 3 years |          | (e) Total |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|---------------|----------|-----------|
|                                                                                                                                                                    | (a) 2009 | (b) 2008 | (c) 2007      | (d) 2006 |           |
| <b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .                      |          |          |               |          | 0         |
| <b>b</b> 85% of line 2a . . . . .                                                                                                                                  | 0        | 0        | 0             | 0        | 0         |
| <b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .                                                                             |          |          |               |          | 0         |
| <b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .                                                           |          |          |               |          | 0         |
| <b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .                                   | 0        | 0        | 0             | 0        | 0         |
| <b>3</b> Complete 3a, b, or c for the alternative test relied upon:                                                                                                |          |          |               |          |           |
| <b>a</b> "Assets" alternative test—enter:                                                                                                                          |          |          |               |          |           |
| <b>(1)</b> Value of all assets . . . . .                                                                                                                           |          |          |               |          | 0         |
| <b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .                                                                                     |          |          |               |          | 0         |
| <b>b</b> "Endowment" alternative test—enter $\frac{3}{4}$ of minimum investment return shown in Part X, line 6 for each year listed . . . . .                      |          |          |               |          | 0         |
| <b>c</b> "Support" alternative test—enter:                                                                                                                         |          |          |               |          |           |
| <b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . . |          |          |               |          | 0         |
| <b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) . . . . .                                      |          |          |               |          | 0         |
| <b>(3)</b> Largest amount of support from an exempt organization . . . . .                                                                                         |          |          |               |          | 0         |
| <b>(4)</b> Gross investment income . . . . .                                                                                                                       |          |          |               |          | 0         |

**Part XV Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see page 27 of the instructions.)

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

NONE

- b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

- 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**
- Check here  if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

N/A

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

N/A

- c** Any submission deadlines:

N/A

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

N/A

**Part XV** Supplementary Information (continued)

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

| Recipient                                                         | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount                |
|-------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|----------------------------------|-----------------------|
| Name and address (home or business)                               |                                                                                                           |                                |                                  |                       |
| <p><b>a</b> <i>Paid during the year</i></p> <p>SEE SCHEDULE 4</p> |                                                                                                           |                                |                                  |                       |
|                                                                   |                                                                                                           | PUBLIC                         | VARIOUS                          | 1,470,000             |
| <b>Total</b> .....                                                |                                                                                                           |                                |                                  | ▶ <b>3a</b> 1,470,000 |
| <p><b>b</b> <i>Approved for future payment</i></p>                |                                                                                                           |                                |                                  |                       |
| <b>Total</b> .....                                                |                                                                                                           |                                |                                  | ▶ <b>3b</b> 0         |





**ISRAEL HENRY BEREN CHARITABLE TRUST**  
**Schedule 1**

**48-6337836**  
**Form 990-PF, 2009**

**PART I, Line 1: Contributions, gifts, grants, etc., received:**

|      |   |
|------|---|
| None | 0 |
|      | 0 |

**PART I, Line 11: Other Income:**

|                                       |        |
|---------------------------------------|--------|
| Miscellaneous Income                  | 4      |
| Unclaimed Property - Avaya, Inc       | 45,294 |
| Cardinal Health Litigation Settlement | 9,171  |
|                                       | 54,469 |

**PART I, Line 16a: Legal Fees:**

|                                                          |       |
|----------------------------------------------------------|-------|
| Friedman, Kaplan, Seiler & Adelman - Lancer Receivership | 6,064 |
|                                                          | 6,064 |

**PART I, Line 16b: Accounting Expense:**

|                               |       |
|-------------------------------|-------|
| Gutschenritter & Johnson, LLC | 1,295 |
|                               | 1,295 |

**PART I, Line 16c: Other Professional Fees:**

|                                 |        |
|---------------------------------|--------|
| First Manhattan - Advisory Fees | 72,150 |
| Bank of America - Advisory Fees | (80)   |
|                                 | 72,070 |

**PART I, Line 18: Taxes:**

|                    |        |
|--------------------|--------|
| Federal Income Tax | 15,000 |
| Foreign Tax Paid   | 3,247  |
|                    | 18,247 |

**PART I, Line 23: Other Expenses:**

|                           |      |
|---------------------------|------|
| Portfolio Expense - Ascot | 589  |
| Bank Charges              | (12) |
| Freight & Postage         | 13   |
| Miscellaneous Expense     | 246  |
|                           | 836  |

**ISRAEL HENRY BEREN CHARITABLE TRUST**  
**Schedule 2**

**48-6337836**  
**Form 990-PF, 2009**

| BEGINNING OF YEAR | END OF YR BOOK VALUE | END OF YR MKT VALUE |
|-------------------|----------------------|---------------------|
|-------------------|----------------------|---------------------|

**PART II, Line 10a: Investments - U.S. & state government obligations:**

|                                   |           |                  |                |                |
|-----------------------------------|-----------|------------------|----------------|----------------|
| U.S. Treasury Bill-Due 01/10/2008 | 1,500,000 |                  | 0              | 0              |
| U S. Treasury Bill-Due 01/10/2008 | 1,100,000 |                  | 0              | 0              |
| U.S. Treasury Bill-Due 10/22/2009 | 900,000   | 1,487,563        | 449,941        | 449,996        |
|                                   |           | <b>1,487,563</b> | <b>449,941</b> | <b>449,996</b> |

**PART II, Line 10b: Investments - corporate stock:**

| Stocks:                           | # Shares   |           |           |            |
|-----------------------------------|------------|-----------|-----------|------------|
| Exxon/Mobil                       | 60,000     | 911,796   | 911,796   | 4,091,400  |
| Peoples Bancorp Inc.              | 24,136     | 203,322   | 203,322   | 233,636    |
| Peoples Bancorp Inc.              | incl above | 20,446    | 20,446    | incl above |
| Chevron/Texaco Inc.               | 60,570     | 1,197,102 | 1,197,102 | 4,663,284  |
|                                   |            | 0         | 0         |            |
| Abb LTD Sponsored ADR             | 18,500     | 372,591   | 372,591   | 353,350    |
| Altna Group Inc.                  | 8,000      | 89,110    | 89,110    | 157,040    |
| Altna Group Inc.                  | 1,000      | 10,644    | 10,644    | 19,630     |
| Altna Group Inc.                  | 1,000      | 9,164     | 9,164     | 19,630     |
| Altna Group Inc.                  | 11,500     | 234,204   | 234,204   | 225,745    |
| American Express Co.              | 8,000      | 465,206   | 465,206   | 324,160    |
| American Express Co.              | 4,000      | 171,540   | 171,540   | 162,080    |
| Astrazeneca                       | 8,500      | 0         | 385,960   | 398,990    |
| Becton Dickinson & Co             | 7,000      | 0         | 457,825   | 552,020    |
| Berkshire Hathaway                | 1          | 67,849    | 67,849    | 99,200     |
| Berkshire Hathaway                | 1          | 68,049    | 68,049    | 99,200     |
| Berkshire Hathaway                | 3          | 204,649   | 204,649   | 297,600    |
| Berkshire Hathaway                | 5          | 419,799   | 419,799   | 496,000    |
| CBS Corp CL B Com                 | 7,000      | 201,226   | 201,226   | 98,350     |
| CBS Corp CL B Com                 | 3,000      | 78,918    | 78,918    | 42,150     |
| CBS Corp CL B Com                 | 10,000     | 266,071   | 266,071   | 140,500    |
| CBS Corp CL B Com                 | 4,000      | 88,626    | 88,626    | 56,200     |
| CBS Corp CL B Com                 | 6,000      | 105,020   | 105,020   | 84,300     |
| CBS Corp CL B Com                 | 20,000     | 134,460   | 134,460   | 281,000    |
| Capital One Financial Corp        | 7,753      | 0         | 0         | 0          |
| CVS Corp                          | 20,875     | 611,156   | 611,156   | 672,384    |
| Comcast Corp CL A                 | 30,000     | 557,486   | 557,486   | 505,800    |
| Discovery Communications Inc      | 12,500     | 157,205   | 170,820   | 383,375    |
| Discovery Communications Inc      | 2,500      | 31,605    | 34,343    | 76,675     |
| Discovery Communications Inc      | 12,500     | 166,992   | 153,376   | 331,500    |
| Discovery Communications Inc      | 2,500      | 33,573    | 30,835    | 66,300     |
| General Electric                  | 16,500     | 515,578   | 515,578   | 249,645    |
| General Electric                  | 5,000      | 176,336   | 176,336   | 75,650     |
| Glaxosmithkline PLC ADR           | 5,500      | 536,801   | 295,241   | 232,375    |
| Glaxosmithkline PLC ADR           | 3,500      | 182,112   | 182,112   | 147,875    |
| Hartford Financial Services Group | 0          | 147,857   | 0         | 0          |
| Hartford Financial Services Group | 0          | 331,631   | 0         | 0          |
| IBM                               | 1,500      | 309,806   | 132,774   | 196,350    |
| IBM                               | 2,000      | 168,869   | 168,869   | 261,800    |
| IBM                               | 1,500      | 115,764   | 115,764   | 196,350    |
| Johnson & Johnson                 | 10,000     | 579,347   | 579,347   | 644,100    |
| Johnson & Johnson                 | 2,000      | 127,644   | 127,644   | 128,820    |
| Kellogg Co                        | 11,000     | 508,751   | 508,751   | 585,200    |
| Kimco Realty Corp                 | 0          | 388,186   | 0         | 0          |



**ISRAEL HENRY BEREN CHARITABLE TRUST**  
**Schedule 2**

**48-6337836**  
**Form 990-PF, 2009**

**PART II, Line 10b: Investments - corporate stock:**

|                              |        |                   |                   |                   |
|------------------------------|--------|-------------------|-------------------|-------------------|
| Liberty Capital Ser A        | 3,250  | 0                 | 0                 | 0                 |
| Microsoft Corp               | 13,500 | 353,512           | 353,512           | 411,480           |
| Microsoft Corp               | 7,500  | 201,251           | 201,251           | 228,600           |
| Microsoft Corp               | 5,000  | 125,981           | 125,981           | 152,400           |
| Nestle Sa-Sponsored          | 5,000  | 111,961           | 111,961           | 242,805           |
| Nestle Sa-Sponsored          | 12,500 | 296,809           | 296,809           | 607,013           |
| Northern Trust Co            | 10,000 | 429,204           | 429,204           | 524,000           |
| Pfizer Inc                   | 14,775 | 0                 | 260,927           | 268,757           |
| Philip Morris Intl Inc Com   | 1,000  | 24,454            | 24,454            | 48,190            |
| Philip Morris Intl Inc Com   | 1,000  | 21,054            | 21,054            | 48,190            |
| Philip Morris Intl Inc Com   | 8,000  | 204,719           | 204,719           | 385,520           |
| Procter & Gamble Co          | 10,000 | 539,259           | 539,259           | 606,300           |
| Procter & Gamble Co          | 3,500  | 218,692           | 218,692           | 212,205           |
| Reckitt Benckiser            | 12,000 | 455,125           | 455,125           | 650,220           |
| Reed Elsevier P L C Spon Adr | 11,686 | 482,226           | 482,226           | 383,184           |
| Reed Elsevier P L C Spon Adr | 2,314  | 104,563           | 104,563           | 75,876            |
| 3M CO COM                    | 4,000  | 329,280           | 329,280           | 330,680           |
| 3M CO COM                    | 2,000  | 156,177           | 156,177           | 165,340           |
| 3M CO COM                    | 1,500  | 115,761           | 115,761           | 124,005           |
| Staples Inc                  | 20,000 | 463,926           | 463,926           | 491,800           |
| Staples Inc                  | 5,000  | 115,774           | 115,774           | 122,950           |
| Tyco Intl Ltd                | 3,750  | 182,137           | 182,137           | 133,800           |
| Tyco Intl Ltd                | 1,250  | 56,804            | 56,804            | 44,600            |
| Tyco Intl Ltd                | 1,625  | 68,142            | 68,142            | 57,980            |
| Tyco Intl Ltd                | 5,375  | 212,566           | 212,566           | 191,780           |
| Tyco Intl Ltd                | 5,000  | 129,151           | 129,151           | 178,400           |
| United Parcel SVC INC CL B   | 7,000  | 516,104           | 0                 | 0                 |
| United Parcel SVC INC CL B   | 2,500  | 192,940           | 0                 | 0                 |
| United Technologies Corp     | 6,500  | 440,460           | 440,460           | 451,165           |
| Vornado Realty Trust         | 6,500  | 356,546           | 356,546           | 454,610           |
| Vornado Realty Trust         | 108    | 0                 | 3,464             | 7,554             |
| Vornado Realty Trust         | 72     | 0                 | 3,463             | 5,036             |
| Vornado Realty Trust         | 33     | 0                 | 1,791             | 2,308             |
| Vornado Realty Trust         | 24     | 0                 | 1,674             | 1,678             |
| Wells Fargo & Co New         | 5,000  | 113,804           | 113,804           | 134,950           |
| Wyeth                        | 15,000 | 575,490           | 0                 | 0                 |
| Zimmer Hldgs Inc             | 3,400  | 428,797           | 227,799           | 200,974           |
| Zimmer Hldgs Inc             | 2,300  | 152,965           | 152,965           | 135,953           |
| Zimmer Hldgs Inc             | 1,300  | 51,171            | 51,171            | 76,843            |
|                              |        | <b>19,193,296</b> | <b>17,536,601</b> | <b>25,806,810</b> |

**PART II, Line 10c: Investments - corporate bonds:**

|                              |                |                  |                  |
|------------------------------|----------------|------------------|------------------|
| Altria Group Inc             | 0              | 262,657          | 283,575          |
| Arch Capital Group           | 0              | 79,340           | 127,245          |
| Comcast Corp New NT          | 0              | 288,285          | 323,076          |
| Donnelley RR & Sons          | 0              | 289,125          | 302,142          |
| Iron Mtn Inc                 | 0              | 297,300          | 301,500          |
| Leucadia Nat'l Corp Sr Sub   | 0              | 294,725          | 351,313          |
| Sungard Data Systems Inc NTS | 115,125        | 115,125          | 153,750          |
| Western Un Corp              | 0              | 277,197          | 323,616          |
|                              | <b>115,125</b> | <b>1,903,754</b> | <b>2,166,217</b> |

**ISRAEL HENRY BEREN CHARITABLE TRUST**  
**Schedule 2**

**48-6337836**  
**Form 990-PF, 2009**

**PART II, Line 13: Investments - other:**

|                                        |           |           |           |
|----------------------------------------|-----------|-----------|-----------|
| Ascot Partners, L.P.                   | 19,375    | 18,788    | 18,788    |
| Ascot Partners, L.P. - Unrealized Gain | 719,135   | 719,135   | 719,135   |
| First Bio Med Ltd.                     | 3,000,000 | 3,000,000 | 5,982,677 |
| Gift Certificates.com                  | 0         | 0         | 0         |
| Gotham Partners International          | 149,156   | 149,156   | 7,596     |
| Lancer Offshore Inc.                   | 5,000,000 | 4,894,395 | 0         |

|           |           |           |
|-----------|-----------|-----------|
| 8,887,666 | 8,781,474 | 6,728,196 |
|-----------|-----------|-----------|

**ISRAEL HENRY BEREN CHARITABLE TRUST**  
**Schedule 3**

**48-6337836**  
**Form 990-PF, 2009**

| DESCRIPTION                                                            | NUMBER OF UNITS | DATE ACQUIRED | DATE SOLD | SALES PROCEEDS   | COST & EXPENSES OF SALE | SHORT-TERM GAIN/(LOSS) | LONG-TERM GAIN/(LOSS) |
|------------------------------------------------------------------------|-----------------|---------------|-----------|------------------|-------------------------|------------------------|-----------------------|
| FIRST MANHATTAN COMPANY<br>-SEE ATTACHED SCHEDULE 3A                   | STCG            | VARIOUS       | 2009      | 2,083,708        | 2,126,403               | (42,695)               |                       |
| FIRST MANHATTAN COMPANY<br>-SEE ATTACHED SCHEDULE 3A                   | LTCG            | VARIOUS       | 2009      | 1,789,229        | 2,383,613               |                        | (594,384)             |
| FIRST MANHATTAN COMPANY-LTCG DISTRIBUTION<br>-SEE ATTACHED SCHEDULE 3A |                 |               | 2009      | 181              |                         |                        | 181                   |
| CLPS OVERSEAS -<br>LIQUIDATION DISTRIBUTION                            |                 |               | 2009      | 1,206            |                         |                        | 1,206                 |
|                                                                        |                 |               |           | <b>3,874,324</b> | <b>4,510,016</b>        | <b>(42,695)</b>        | <b>(592,997)</b>      |
|                                                                        |                 |               |           |                  |                         |                        | <b>(635,692)</b>      |

**ISRAEL HENRY BEREN CHARITABLE TRUST**  
**Schedule 3A**

**48-6337836**  
**Form 990-PF, 2009**

| DESCRIPTION                               | NUMBER OF UNITS | DATE ACQUIRED | DATE SOLD  | SALES PROCEEDS      | COST & EXPENSES OF SALE | SHORT-TERM GAIN/(LOSS) | LONG-TERM GAIN/(LOSS) |
|-------------------------------------------|-----------------|---------------|------------|---------------------|-------------------------|------------------------|-----------------------|
| KIMCO REALTY CORP                         | 30,000          | 12/1/2008     | 5/18/2009  | 337,791 27          | 388,185 88              | (50,394 61)            |                       |
| U S TREASURY BILLS DTD 02/12/09           | 400,000         | 3/12/2009     | 3/19/2009  | 399,571 73          | 399,410 10              | 161 63                 |                       |
| U S TREASURY BOND DTD 10/23/08            | 2,400,000       | 11/26/2008    | 1/16/2009  | 349,026 81          | 347,098 11              | 1,928 70               |                       |
| U S TREASURY BOND DTD 10/23/08            | 400,000         | 11/26/2008    | 3/19/2009  | 448,779 60          | 446,269 00              | 2,510 60               |                       |
| U S TREASURY BOND DTD 10/23/08            | 750,000         | 11/26/2008    | 3/25/2009  | 548,538 60          | 545,439 90              | 3,098 70               |                       |
|                                           |                 |               |            | <b>2,083,708 01</b> | <b>2,126,402 99</b>     | <b>(42,694 98)</b>     |                       |
| GLAXOSMITHKLINE PLC ADR                   | 4,500           | 3/21/2006     | 12/9/2009  | 186,565 19          | 241,560 42              |                        | (54,995 23)           |
| HARTFORD FINANCIAL SERVICES GP            | 2,500           | 12/13/2001    | 5/18/2009  | 38,448 26           | 147,857 37              |                        | (109,409 11)          |
| HARTFORD FINANCIAL SERVICES GP            | 5,000           | 6/4/2004      | 5/18/2009  | 76,896 51           | 331,630 77              |                        | (254,734 26)          |
| INTERNATIONAL BUSINESS MACHINE            | 2,000           | 6/4/2004      | 2/27/2009  | 185,474 76          | 177,031 76              |                        | 8,443 00              |
| UNITED PARCEL SVC INC CL B                | 7,000           | 10/17/2006    | 3/9/2009   | 270,997 87          | 516,104 20              |                        | (245,106 33)          |
| UNITED PARCEL SVC INC CL B                | 2,500           | 12/15/2006    | 3/9/2009   | 96,784 96           | 192,939 97              |                        | (96,155.01)           |
| WYETH                                     | 15,000          | 9/19/2008     | 10/16/2009 | 755,926 50          | 575,489 50              |                        | 180,437 00            |
| ZIMMER HLDGS INC                          | 3,000           | 11/15/2007    | 12/16/2009 | 178,134 81          | 200,998 69              |                        | (22,863 88)           |
|                                           |                 |               |            | <b>1,789,228 86</b> | <b>2,383,612 68</b>     |                        | <b>(594,383 82)</b>   |
| VORNADO RLTY TR CG DISTRIB                |                 |               | 2009       | 181 12              |                         |                        | 181 12                |
| FIRST MANHATTAN CAPITAL GAIN DISTRIBUTION |                 |               |            | 181 12              | -                       | -                      | 181 12                |
| TOTAL GAINS/LOSS                          |                 |               |            | <b>3,873,117 99</b> | <b>4,510,015 67</b>     | <b>(42,694 98)</b>     | <b>(594,202 70)</b>   |
|                                           |                 |               |            |                     |                         |                        | <b>(636,897 68)</b>   |

"X" = Written ackn rec'd  
"NN" = Written ackn not necessary

| CONTRIBUTIONS:   |                                                                                             | PURPOSE        |                                           |
|------------------|---------------------------------------------------------------------------------------------|----------------|-------------------------------------------|
| 8/27/2009 #1310  | HILLEL AT UNIVERSITY OF FLORIDA<br>2020 W UNIVERSITY AVENUE<br>GAINSVILLE, FL 32603         | 20,000.00 X    | JEWISH LIFE/KOSHER DINING                 |
| 12/24/2009 #1311 | FOUNDATION FOR JEWISH CAMPING, INC<br>15 WEST 36TH STREET, 13TH FLOOR<br>NEW YORK, NY 10018 | 100,000.00 X   | GENERAL FUND                              |
| 12/24/2009 #1312 | HADASSAH<br>50 WEST 58 STREET<br>NEW YORK, NY 10019-2500                                    | 250,000.00 X   | IHB CARDIOTHORACIC INTENSIVE<br>CARE UNIT |
| 12/24/2009 #1314 | OHR TORAH STONE<br>49 WEST 45TH STREET #701<br>NEW YORK, NY 10036                           | 1,000,000.00 X | IHB ACADEMIC CENTER                       |
| 12/24/2009 #1453 | AMERICAN FRIENDS OF BEIT MORASHA<br>PO BOX 940459<br>ROCKAWAY BEACH, NY 11694               | 100,000.00 X   | GENERAL FUND                              |

TOTAL CONTRIBUTIONS 1,470,000.00

## Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

▶ **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).  
**Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.**

**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension—check this box and complete Part I only

*All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.*

**Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on *e-file for Charities & Nonprofits*.

|                                                                                                       |                                                                                                                          |                                                     |
|-------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------|
| <b>Type or print</b><br><small>File by the due date for filing your return. See instructions.</small> | Name of Exempt Organization<br><b>ISRAEL HENRY BEREN CHARITABLE TRUST</b>                                                | Employer identification number<br><b>48-6337836</b> |
|                                                                                                       | Number, street, and room or suite no. If a P.O. box, see instructions.<br><b>ROBERT M. BEREN, TRUSTEE P.O. BOX 20380</b> |                                                     |
|                                                                                                       | City, town or post office, state, and ZIP code. For a foreign address, see instructions.<br><b>WICHITA, KS 67208</b>     |                                                     |

**Check type of return to be filed (file a separate application for each return):**

- |                                                 |                                                                   |                                    |
|-------------------------------------------------|-------------------------------------------------------------------|------------------------------------|
| <input type="checkbox"/> Form 990               | <input type="checkbox"/> Form 990-T (corporation)                 | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL            | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ            | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A                              | <input type="checkbox"/> Form 8870 |

● The books are in the care of ▶ DONNA STUCKY

Telephone No. ▶ 316-265-3311 FAX No. ▶ 316-265-9661

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ . If this is for the whole group, check this box  . If it is for part of the group, check this box  and attach a list with the names and EINs of all members the extension will cover.

**1** I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2010, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- ▶  calendar year 2009 or
- ▶  tax year beginning \_\_\_\_\_, 20\_\_\_\_, and ending \_\_\_\_\_, 20\_\_\_\_\_.

**2** If this tax year is for less than 12 months, check reason:  Initial return  Final return  Change in accounting period

|                                                                                                                                                                                                                               |           |    |        |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|----|--------|
| <b>3a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.                                                                    | <b>3a</b> | \$ | 5,433  |
| <b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.                                               | <b>3b</b> | \$ | 25,553 |
| <b>c Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions. | <b>3c</b> | \$ | 0.00   |

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box  **Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.
- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

|                                                                                           |                                                                                                                 |                                              |
|-------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|----------------------------------------------|
| Type or print<br><br>File by the extended due date for filing the return See Instructions | Name of Exempt Organization<br>ISRAEL HENRY BEREN CHARITABLE TRUST                                              | Employer identification number<br>48-6337836 |
|                                                                                           | Number, street, and room or suite no. If a P O box, see instructions<br>ROBERT M. BEREN, TRUSTEE P.O. BOX 20380 | For IRS use only                             |
|                                                                                           | City, town or post office, state, and ZIP code. For a foreign address, see instructions.<br>WICHITA, KS 67208   |                                              |

Check type of return to be filed (File a separate application for each return):

- |                                      |                                                                   |                                      |                                    |
|--------------------------------------|-------------------------------------------------------------------|--------------------------------------|------------------------------------|
| <input type="checkbox"/> Form 990    | <input checked="" type="checkbox"/> Form 990-PF                   | <input type="checkbox"/> Form 1041-A | <input type="checkbox"/> Form 6069 |
| <input type="checkbox"/> Form 990-BL | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 4720   | <input type="checkbox"/> Form 8870 |
| <input type="checkbox"/> Form 990-EZ | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 5227   |                                    |

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

• The books are in the care of **▶ DONNA STUCKY**

Telephone No. **▶ 316-265-3311** FAX No. **▶ 316-265-9661**

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ . If this is for the whole group, check this box  . If it is for part of the group, check this box  and attach a list with the names and EINs of all members the extension is for.

- 4 I request an additional 3-month extension of time until NOVEMBER 15, 2010.
- 5 For calendar year 2009, or other tax year beginning \_\_\_\_\_, 20\_\_\_\_, and ending \_\_\_\_\_, 20\_\_\_\_.
- 6 If this tax year is for less than 12 months, check reason:  Initial return  Final return  Change in accounting period
- 7 State in detail why you need the extension INFORMATION NEEDED TO FILE A COMPLETE AND ACCURATE RETURN IS NOTE YET AVAILABLE.

|                                                                                                                                                                                                                                            |                     |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| <b>8a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.                                                                                 | <b>8a</b> \$ 5,433  |
| <b>b</b> If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868. | <b>8b</b> \$ 25,553 |
| <b>c Balance Due.</b> Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.              | <b>8c</b> \$ 0.00   |

**Signature and Verification**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form.

Signature **▶** 

Title **▶** CPA

Date **▶** 8/16/10