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

OMB No 1545-0052

2010

Department of the Treasury Internal Revenue Service

Note The foundation may be able to use a copy of this return to satisfy state reporting requirements For calendar year 2010, or tax year beginning 2010, and ending G Check all that apply Initial return Initial Return of a former public charity Final return Amended return Address change Name change Employer identification number HELEN K. & JAMES S. COPLEY FOUNDATION 95-6051770 P. O. BOX 1530 В Telephone number (see the instructions) LA JOLLA, CA 92038 (858) 454-0411 С If exemption application is pending, check here D 1 Foreign organizations, check here Н X Section 501(c)(3) exempt private foundation 2 Foreign organizations meeting the 85% test, check Check type of organization here and attach computation Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation Ε If private foundation status was terminated J Accounting method X Cash Fair market value of all assets at end of year Accrual under section 507(b)(1)(A), check here (from Part II, column (c), line 16) Other (specify) If the foundation is in a 60-month termination <u>7,356,</u>098. ► S (Part I, column (d) must be on cash basis) under section 507(b)(1)(B), check here Part I Analysis of Revenue and (a) Revenue and (b) Net investment (c) Adjusted net (d) Disbursements Expenses (The total of amounts in expenses per books income ıncome for charitable columns (b), (c), and (d) may not neces sarily equal the amounts in column (a) purposes (cash basis only) (see the instructions)) Contributions, gifts, grants, etc, received (att sch) Ck ► X if the foundn is **not** req to att Sch B 2 Interest on savings and temporary cash investments 226 226 166,174 166,174 Dividends and interest from securities 5a Gross rents Net rental income -11,907 6a Net gain/(loss) from sale of assets not on line 10 Gross sales price for all assets on line 6a 1,659,753 Capital gain net income (from Part IV, line 2) 0 Net short-term capital gain 0 Income modifications 10a Gross sales less returns and allowances **b** Less Cost of goods sold c Gross profit/(loss) (att sch) 11 Other income (attach schedule) SEE STATEMENT 1 618 618 Total. Add lines 1 through 11 155,111. 167,018 0 13 Ο. Compensation of officers, directors, trustees, etc 22,822. 22,822 Other employee salaries and wages $\overline{\circ}$ 15 Pension plans, employee benefits 8 NUV 2 2011 16a Legal fees (attach schedule) **b** Accounting fees (attach sch) က် c Other prof fees (attach sch) INISTRAT OPERATING 17 Interest SEE STM 2 1,039. 1,039 Taxes (attach schedule)(see instr.) Depreciation (attach sch) and depletion Occupancy Travel, conferences, and meetings 21 22 Printing and publications 23 Other expenses (attach schedule) SEE STATEMENT 3 8,486. 8,486 Total operating and administrative <u>32,3</u>47 32,347 expenses. Add lines 13 through 23 Contributions, gifts, grants paid PART XV 5,637,267 5,637,267. Total expenses and disbursements. 5,669,614 0 5,637,267. Add lines 24 and 25 32,347 Subtract line 26 from line 12: a Excess of revenue over expenses -5,514,503 and disbursements 134,671 b Net investment income (if negative, enter 0-)

C Adjusted net income (if negative, enter -0-)

0.

Page 2

Dor	- 11	Balance Sheets Attached schedules and amounts in the description column should be for end of year amounts only	Beginning of year	End o	of year
Par	<u> </u>	Balance Sheets column should be for end of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash – non-interest-bearing			
	2	Savings and temporary cash investments	4,510,888.	502,831.	502,831.
	3	Accounts receivable			
		Less allowance for doubtful accounts ▶			
	4	Pledges receivable			
		Less allowance for doubtful accounts			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons (attach schedule) (see the instructions)			
	7	Other notes and loans receivable (attach sch)			<u> </u>
A S S E		Less allowance for doubtful accounts ▶			
S		Inventories for sale or use			
Т	9	Prepaid expenses and deferred charges			
S	10 a	Investments – US and state government obligations (attach schedule)			
	b	Investments — corporate stock (attach schedule)			
	C	Investments — corporate bonds (attach schedule)			
	11	Investments – land, buildings, and equipment basis.			
		Less accumulated depreciation (attach schedule)			
	12	Investments – mortgage loans.			
	13	Investments – other (attach schedule)	8,141,989.	6,635,543.	6,853,267.
	14	Land, buildings, and equipment basis			
		Less accumulated depreciation (attach schedule)			
		Other assets (describe			
	16	Total assets (to be completed by all filers – see instructions. Also, see page 1, item I)	12,652,877.	7,138,374.	7,356,098.
$\overline{}$	17	Accounts payable and accrued expenses			
A		Grants payable			
B	19	Deferred revenue			
- !	20	Loans from officers, directors, trustees, & other disqualified persons			
<u>ī</u>	21	Mortgages and other notes payable (attach schedule)			
Ţ	22	Other liabilities (describe)			
Ė	-	Table California (add Loss 17 the cale 20)	0	0]
<u> </u>	23	Total liabilities (add lines 17 through 22)	0.	0.	1
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
N F E U T N		Unrestricted			
ΤŇ	25	Temporarily restricted			
A D	26	Permanently restricted			
A B S A E L		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
TA	27	Capital stock, trust principal, or current funds			
SŅ	28	Paid-in or capital surplus, or land, building, and equipment fund			
O E R S	29	Retained earnings, accumulated income, endowment, or other funds	12,652,877.	7,138,374.	
RS	30	Total net assets or fund balances (see the instructions)	12,652,877.	7,138,374.	
	31	Total liabilities and net assets/fund balances (see the instructions)	12,652,877.	7,138,374.	
Parl	1111	Analysis of Changes in Net Assets or Fund Balance		,,150,571	<u> </u>
		net assets or fund balances at beginning of year — Part II, colu		araa with	
•	end-c	field assets or fund balances at beginning of year — Fart II, cold of year figure reported on prior year's return).	imii (a), iiile 30 (must a	gree with 1	12,652,877.
2		amount from Part I, line 27a		2	-5,514,503.
		ncreases not included in line 2 (itemize)		3	
4	Add I	ines 1, 2, and 3		4	7,138,374.
		ses not included in line 2 (itemize)		5	
6	Total	net assets or fund balances at end of year (line 4 minus line 5)	- Part II, column (b),	ine 30 6	7,138,374.

Form 990-PF (2010)

(a) List and describ 2-story brick warehou	(b) How acquired P — Purchase	(C) Date acquired (month, day, year)	(d) Date sold (month, day, year)		
1a SEE STATEMENT 4	D — Donation	 			
b				-	
					
d		-		·	
		· · · · - · - · - · - · -		 	
(e) Gross sales price	(A Degravation allowed	(m) Cost or other base		(h) Corp. or	(1000)
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gaın or (e) plus (f) m	
	 				
ab	 - · - - 			<u> </u>	
С С	 				
d					
e					
	ving gain in column (h) and owned by	the foundation on 12/31/69		(1) 0 (0-1	
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (over column (j), if any	(i) y t	(1) Gains (Col gain minus column (han -0-) or Losses (fi	k), but not less
a		· · · · · · · · · · · · · · · · · · ·			
b		·········			<u> </u>
C					
d				-	
e					
2 Capital gain net income or (ne	et capital loss) If gain, also	enter in Part I, line 7 er -0- in Part I, line 7	2		~ 11,907.
3 Net short-term capital gain or	(loss) as defined in sections 1222(5)	and (6)			,
		_			
in Part I, line 8	e 8, column (c) (see the instructions)	ii (loss), enter -o-	3		- 15,872.
Part V Qualification Unde	r Section 4940(e) for Reduce	d Tax on Net Investmen	nt Income	•	•
If 'Yes,' the foundation does not qua	ction 4942 tax on the distributable arr lify under section 4940(e) Do not co	mplete this part	<u> </u>	Yes	X No
1 Enter the appropriate amount	in each column for each year, see th	e instructions before making	any entries		
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use asse	ets (co	(d) Distributior lumn (b) divided	
2009	2,816,624.	13,171	,926.		0.213835
2008	4,065,609.	20,298			0.200292
2007	1,865,652.	24,797	,715.		0.075235
2006	1,729,730.	29,367	<u>,</u> 710.		0.058899
2005	2,244,990.	25,877	,453.		0.086755
2 Total of line 1, column (d)			2		0.635016
3 Average distribution ratio for the number of years the foundation	he 5-year base period – divide the to n has been in existence if less than 5	tal on line 2 by 5, or by the years	3		0.127003
4 Enter the net value of nonchar	itable-use assets for 2010 from Part	X, line 5	4	1	0,491,224.
5 Multiply line 4 by line 3			5		1,332,417.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6		1,347.
7 Add lines 5 and 6			7		1,333,764.
8 Enter qualifying distributions for	rom Part XII, line 4		8		5,637,267.
If line 8 is equal to or greater Part VI instructions	than line 7, check the box in Part VI,	line 1b, and complete that pa	art using a 1	% tax rate See t	he

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Par	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see the instru	ctions)		
1 a	Exempt operating foundations described in section 4940(d)(2), check here			
	Date of ruling or determination letter: (attach copy of letter if necessary – see instr.)		-	
b	Domestic foundations that meet the section 4940(e) requirements in Part V,		1,3	347.
	check here ► X and enter 1% of Part I, line 27b			
c	: All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)			i
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable			ŗ
-	foundations only Others enter -0-)			0.
3	Add lines 1 and 2		1,3	<u>347.</u>
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			<u>0.</u>
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		<u>1,3</u>	347.
6	Credits/Payments			ĺ
	2010 estimated tax pmts and 2009 overpayment credited to 2010			
	Exempt foreign organizations — tax withheld at source			
	: Tax paid with application for extension of time to file (Form 8868)			į
	Backup withholding erroneously withheld			
7	Total credits and payments Add lines 6a through 6d		1,7	<u>776.</u>
8	Enter any penalty for underpayment of estimated tax. Check here			
9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed			<u>0.</u>
10	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		4	<u> 129.</u>
11				<u>0.</u>
Par	t VII-A Statements Regarding Activities			
1 a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	1 b		Х
	If the answer is 'Yes' to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c	Did the foundation file Form 1120-POL for this year?	1c		X
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			
	(1) On the foundation \Rightarrow 0. (2) On foundation managers \Rightarrow 0.	_		
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \blacktriangleright \$ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		х
2	If 'Yes,' attach a detailed description of the activities	2		
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles	3		v
	of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes	 		X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a 4b	N	/A
5	olf 'Yes,' has it filed a tax return on Form 990-T for this year? Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5	14	X
3	If 'Yes,' attach the statement required by General Instruction T			<u> </u>
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			
Ū	By language in the governing instrument, or			
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state legislation that effectively amends the governing instrument?	ا ۽ ا	х	إ
7	with the state law remain in the governing instrument? Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	7	X	
	Enter the states to which the foundation reports or with which it is registered (see the instructions)			
	N/A			
b	o If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G² If 'No,' attach explanation</i>	8b	Х]- -
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If 'Yes,' complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses	10		<u>x</u>
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11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)			11		Х
	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 exemptio Website address N/A	n applica	ition?	13	Х	
14	The books are in care of F KIM KOCH Telephon		(858)	454	-041	1_
15	Located at > 7776 IVANHOE AVENUE LA JOLLA CA ZIP + 4 > Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here and enter the amount of tax-exempt interest received or accrued during the year		15	N/A		 N/2
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other a bank, securities, or other financial account in a foreign country?	uthority	over a	16	Yes	No X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1. If 'Yes,' enter the n foreign country.	ame of t	he			
	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
	During the year did the foundation (either directly or indirectly)	 .	.			ļ
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	∐ Yes	X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes	XNo			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes	X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes	X 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)?	Yes	XNo			
	(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)	Yes	X No			
	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 the instruction Organizations relying on a current notice regarding disaster assistance check here	ons)?	· 🗆	1 b	N	/A
С	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?			1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section $4942(j)(3)$ or $4942(j)(5)$)					
	At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? If 'Yes,' list the years 20, 20, 20, 20	Yes	X No			
	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942 (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942 all years listed, answer 'No' and attach statement — see the instructions)			2b	N	/A
С	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years ▶ 20 , 20 , 20 , 20	here				
	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	Yes	X No			
	If 'Yes,' did it have excess business holdings in 2010 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 approve 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 2010)	ed		3 b	 N	- /A
	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?			4a		Х
	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 2010?			4b		X
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Part VII-B Statements Regarding Activit	ies for Which Forn	n 4720 May Be Req	uired (continued)		
5a During the year did the foundation pay or incu	•			,	
(1) Carry on propaganda, or otherwise attempt	ot to influence legislation	on (section 4945(e))?	∐ Yes X	No	l
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	lic election (see section ation drive?	n 4955), or to carry		No	
(3) Provide a grant to an individual for travel,	study, or other similar	purposes?	Yes X	No	,
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	han a charitable, etc, o 4940(d)(2)? (see instr	rganization described uctions)	Yes X	No] []
(5) Provide for any purpose other than religio educational purposes, or for the prevention	us, charitable, scientific n of cruelty to children	c, literary, or or animals?	Yes X	No	
b If any answer is 'Yes' to 5a(1)-(5), did any of described in Regulations section 53 4945 or in (see instructions)?	the transactions fail to a current notice regar	qualify under the excep ding disaster assistance	tions	5 b	N/A
Organizations relying on a current notice rega	rding disaster assistan	ce check here	▶ [1	
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon If 'Yes,' attach the statement required by Reg	sibility for the grant?	·	N/A Yes] No	
6a Did the foundation, during the year, receive as on a personal benefit contract?	ny funds, directly or ind	lirectly, to pay premium	S ∐Yes X]No	
b Did the foundation, during the year, pay prem If 'Yes' to 6b, file Form 8870	iums, directly or indirec	ctly, on a personal bene	fit contract?	6Ь	X
7a At any time during the tax year, was the found				No	;
b If yes, did the foundation receive any proceed				N/A 7b	
Part VIII Information About Officers, D and Contractors	irectors, irustees,	Foundation Manag	gers, Highly Paid i	:mpioyees	,
1 List all officers, directors, trustees, foundation	n managers and their	compensation (see inst	ructions).		
(a) Name and address	(b) Title and average hours per week devoted to position		(d) Contributions to employee benefit plans and deferred compensation	(e) Expense other allo	
SEE STATEMENT 5					
		0.	0.		0.
			-		
2 Compensation of five highest-paid employee	s (other than those inc	luded on line 1- see ir	structions). If none, e	nter '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 other allo	: account, wances
NONE	-				
Total number of other employees paid over \$50,000	<u>. </u>	•	-		0

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid and Contractors (continued)	d Employees,
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.'	
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
NONE	
	
Total number of others receiving over \$50,000 for professional services	0
Part X-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 <u>N/A</u>	
2	
	. -
3	
`	· -
4	
Part X B Summary of Program-Related Investments (see instructions)	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 <u>N/A</u>	· -
	-
2	
	·
All other program-related investments. See instructions	
3	
Total Add lines 1 through 3	▶ 0

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Part X Minimum Investment Return (All domestic foundations must complete this see instructions.)	s part. Foreign f	oundations,
1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purpose a Average monthly fair market value of securities.		8,022,265.
b Average of monthly cash balances	<u>16</u>	2,628,724.
c Fair market value of all other assets (see instructions)	1c	10 (50 000
d Total (add lines 1a, b, and c)	1d	10,650,989.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c	0.	
(attach detailed explanation)	2	0.
2 Acquisition indebtedness applicable to line 1 assets3 Subtract line 2 from line 1d	3	10,650,989.
5 Subtract line 2 from line 1d	3	10,030,363.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	159,765.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line	<u> </u>	10,491,224.
6 Minimum investment return. Enter 5% of line 5	7 6	524,561.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private in the section 4942(j)(3) and (j)(4) an	vate operating fo	
and certain foreign organizations check here ► □ and do not comple	, ,	
1 Minimum investment return from Part X, line 6	1	524,561.
2a Tax on investment income for 2010 from Part VI, line 5	1,347.	
b Income tax for 2010 (This does not include the tax from Part VI)		
c Add lines 2a and 2b	2c	1,347.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	523,214.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	523,214.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	523,214.
Part XII Qualifying Distributions (see instructions)		
1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes a Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1 a	5,637,267.
b Program-related investments — total from Part IX-B	1 b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purp		
3 Amounts set aside for specific charitable projects that satisfy the a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	.=
4 Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII,		5,637,267.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment incor Enter 1% of Part I, line 27b (see instructions)		. ,
		1,347.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	5,635,920.

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

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Part XIII Undistributed Income (see instructions)

, - ,	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				523,214.
2 Undistributed income, if any, as of the end of 2010				323,214.
a Enter amount for 2009 only			0.	
b Total for prior years 20, 20, 20		0.		
3 Excess distributions carryover, if any, to 2010				· · · · · · · · · · · · · · · · · · ·
a From 2005 982, 811.				
b From 2006 311, 763.	,			
c From 2007 666,882.				
d From 2008 3, 056, 930.				
e From 2009 2,161,580.	n 400 066			
f Total of lines 3a through e	7,179,966.			
4 Qualifying distributions for 2010 from Part				
XII, line 4 \(\begin{array}{c} \\$ 5,637,267. \\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \			0.	
a Applied to 2009, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required – see instructions)	0.			
d Applied to 2010 distributable amount				523,214.
e Remaining amount distributed out of corpus	5,114,053.			•
5 Excess distributions carryover applied to 2010	0.			0.
(If an amount appears in column (d), the same amount must be shown in column (a))				*
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	12,294,019.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistribut-				
ed income for which a notice of deficiency has been issued, or on which the section				
4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable				
amount - see instructions		0.		
e Undistributed income for 2009 Subtract line 4a from				
line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2010 Subtract lines				
4d and 5 from line 1. This amount must be distributed in 2011				0.
7 Amounts treated as distributions out of				<u> </u>
corpus to satisfy requirements imposed				
by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
,				
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see instructions)	982,811.			······
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	11,311,208.			
10 Analysis of line 9				
a Excess from 2006 311, 763.				
b Excess from 2007 666, 882.				
c Excess from 2008 3, 056, 930.				
d Excess from 2009 2, 161, 580.				
e Excess from 2010 5,114,053.				

Form 990-PF (2010) HELEN K. & JAMES				93-0031//	
Part XIV Private Operating Foundation				_	N/A
1a If the foundation has received a ruling or use effective for 2010, enter the date of the		that it is a private	operating foundation	n, and the ruling	
b Check box to indicate whether the founda	ion is a private ope	erating foundation o	described in section	4942(j)(3) or	4942(J)(5)
2a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year		Prior 3 years		
investment return from Part X for	(a) 2010	(b) 2009	(c) 2008	(d) 2007	(e) Total
each year listed b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					-
d Amounts included in line 2c not used directly for active conduct of exempt activities					
 Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c 					
3 Complete 3a, b, or c for the alternative test relied upon					
a 'Assets' alternative test — enter					
(1) Value of all assets		-	1		
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c 'Support' alternative test — enter					
 Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) 					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942()(3)(B)(III)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income				145.000	
PartXXX Supplementary Information assets at any time during the	(Complete this e vear — see in	part only if the	organization ha	d \$5,000 or moi	re in
Information Regarding Foundation Mana- a List any managers of the foundation who close of any tax year (but only if they have NONE	gers: have contributed m	ore than 2% of the	total contributions re section 507(d)(2))	eceived by the found	dation before the
b List any managers of the foundation who	own 10% or more of	of the stock of a co	rporation (or an equa	ally large portion of	the ownership of
a partnership or other entity) of which the NONE	foundation has a 1	0% or greater inter	rest		
2 Information Regarding Contribution, Grancheck here In the foundation only requests for funds. If the foundation make complete items 2a, b, c, and d	nakes contributions	to preselected cha	arıtable organızatıons		
a The name, address, and telephone number	er of the person to	whom applications	should be addressed	i	
SEE STATEMENT 6					
b The form in which applications should be	submitted and info	mation and materi	als they should inclu	de	
SEE STATEMENT FOR LINE 2A					
c Any submission deadlines					
SEE STATEMENT FOR LINE 2A	auch ac hu canne	high arong shorts	able fields lands of	netitutions of albert	factors
d Any restrictions or limitations on awards,	sucii as by geograf	micai areas, chanta	able Helds, KINGS OF II	nsulutions, or other	Iaciois
SEE STATEMENT FOR LINE 2A					

3 Grants and Contributions Paid During the Ye		ure Paymen	1	·
, , , , , , , , , , , , , , , , , , , ,	If recipient is an individual.			
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation	Purpose of grant or contribution	Amount
Name and address (home or business)	any toundation manager or	recipient	contribution	/ who drift
a Paid during the year	Substantial contributor	 		
SEE STATEMENT- SCHEDULE XV LINE 3(A)				5,637,267.
3 (A)				
,		<u> </u>		
				ŀ
				}
	<u> </u>			
Total	T		► 3a	5,637,267.
b Approved for future payment				
SEE STATEMENT - SCHEDULE XV				6,765,683.
LINE 3(B)				
,				
				1
Total		•	► 3b	6,765,683.
DAA	TEFACEOU			Form 990-PF (2010)

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelate	d business income	Excluded b	y section 512, 513, or 514	(e)
Program service revenue	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	Related or exempt function income (see the instructions)
a	 				
b	\bot				
С	\longrightarrow				
d	↓		 		
e	 		\perp		·
f	++		 		
g Fees and contracts from government agencies	——				
2 Membership dues and assessments	—				
3 Interest on savings and temporary cash investments	 		14	226.	
4 Dividends and interest from securities			14	166,174.	
5 Net rental income or (loss) from real estate					
a Debt-financed property	<u> </u>		\perp		
b Not debt-financed property	<u> </u>		\vdash		
6 Net rental income or (loss) from personal property					
7 Other investment income			<u> </u>		
8 Gain or (loss) from sales of assets other than inventory			18	-11,907.	
9 Net income or (loss) from special events.	\vdash				
10 Gross profit or (loss) from sales of inventory			\perp		
11 Other revenue					<u> </u>
a PUTNAM FAIR FUND SETTLMNT	\bot				618.
b					
c					
d	\bot		\perp		
e	<u> </u>				
12 Subtotal Add columns (b), (d), and (e)				154,493.	618.
13 Total. Add line 12, columns (b), (d), and (e)				13	155,111.
(See worksheet in line 13 instructions to verify calculation	ons)				

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See the instructions)
N/A	

Form **990-PF** (2010)

Form 990-PF (2010) HELEN K. & JAMES S. COPLEY FOUNDATION 95-6051770 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

										
descri	. e organization directly bed in section 501(c) o ig to political organizat	of the Code (oth	igage in any of the section	the following wit 501(c)(3) organ	h any ot izations)	her organization or in section 5	n 27,		Yes	No
a Transf	fers from the reporting	foundation to a	noncharitable	exempt organiza	ation of					
(1) Ca	ash							1 a (1)		X
(2) Of	ther assets							1a (2)		Х
• • •	transactions							, ,		
	ales of assets to a non	charitable exen	not organization	1				1 b (1)		X
• •	urchases of assets from							1 b (2)		Х
	ental of facilities, equip							1 b (3)		<u>X</u>
•	eimbursement arrangei	•	assets					1b (4)		X
• •	oans or loan guarantee							1b (5)		X
٠,	ŭ		6							X
٠,	erformance of services	•	•					1b (6)		X
c Snarir	ng of facilities, equipmi	ent, mailing list	s, other assets,	or paid employ	ees			1c		
the ac	answer to any of the a ods, other assets, or s ansaction or sharing a	services aiven b	ov the reporting	foundation If the	e founda	ation received le	ess than fair marke	t value in	ue of	
(a) Line no	(b) Amount involved	 	noncharitable exem	-			fers, transactions, and		naement	s
N/A	(b) / induit involved	(G) Hamile Si	THE	pr organization			,	<u>g</u>	,g	
										
	_	<u> </u>								
						-		 		
		-								
										
		 								
	_									
		 								
i		-								
	.,	<u> </u>		<u> </u>						
		<u></u>								
					ļ					
		L			<u> </u>					
	foundation directly or ibed in section 501(c) os, complete the following		ted with, or rela her than section	ated to, one or n n 501(c)(3)) or in	nore tax- section	exempt organiz 527?	ations	Yes	X	No
	(a) Name of organizati	ion	(b) Type	of organization		(c	Description of rela	ationship		
N/A										
<u> </u>										
		Î				-				
Unde	er penalties of perjury, I declar	re that I have exami	ned this return, includ	ling accompanying so	hedules an	d statements, and to	the best of my knowledge	e and belief, i	t is true,	,
Sign	ect, and complete Declaration	of preparer (other the	han taxpayer or fiduc	nary) is based on all i	nformation	of which preparer ha	s any knowledge TREASURER			
	Signature of officer or trustee		, , , , , ,		Date	. , , , , , ,	Title	•		
	Print/Type preparer's nar	me ()	Preparer's	signatue		Date	Check if X if	PTIN		
	1	IELDS, CPA		XX.	_	11/10/11		P00368	3722	
Paid			HIELDS, CE			1 7 7011	self-employed	11 00300	144	
Preparer					285		Firm's EIN			
Jse Only	Firm's address	9820 WILLO		URD, SIE. 4	.05		Ohana =) 577.	ろちっし	
	<u>\</u>	SAN DIEGO,	CA 92131		_ 		Phone no (858			
BAA								Form 99	W-PF ((2010)

SCHEDULE D (Form 1041)

Name of estate or trus

Capital Gains and Losses

Employer identification number

Department of the Treasury Internal Revenue Service

► Attach to Form 1041, Form 5227, or Form 990-T. See the Instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).

2010

OMB No 1545-0092

HELEN K AND JAMES S COPLEY FOUNDATION 95-6051770 Note: Form 5227 filers need to complete only Parts I and II Parti Short-Term Capital Gains and Losses - Assets Held One Year or Less (c) (e) **(f)** (a) Description of property (Example 100 shares Date acquired Date sold Sales price Cost or Gain or (loss) (mo, day, yr) (mo, day, yr) other basis for the entire year 7% preferred of 'Z' Co) (see instructions) Subtract (e) from (d) 9102.22 JP MORGAN SHORT DURATION BOND FUND 12/01/10 11/30/10 100,307 9,972 90,335. **b** Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b 1 b 2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 2 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts 3 Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2009 Capital Loss Carryover Worksheet 4 -201,151. Net short-term gain or (loss). Combine lines 1a through 4 in column (f) Enter here and 5 on line 13, column (3) on page 2 -110,816. Ramus Long-Term Capital Gains and Losses — Assets Held More Than One Year (a) (c) (d) (e) 6a Description of property Date acquired Date sold Sales price Cost or Gain or (loss) (Example 100 shares (mo, day, yr) (mo, day, yr) other basis for the entire year 7% preferred of 'Z' Co) (see instructions) Subtract (e) from (d) 90654.97 JP MORGAN SHORT DURATION BOND FUND 999,018 975,704 11/02/09 11/30/10 23,314. 8991.784 SELECT INVEST MULTISTRATEGY LTD 6/01/07 1/01/10 83,227 89,918 -6,691. 18201.175 SELECT INVEST MULTISTRATEGY LTD 6/01/07 182,012 7/01/10 167,460 -14,552. 32435.452 SELECT INVEST MULTISTRATEGY LTD 6/01/07 11/01/10 307,847 324,354 -16,507. MORGAN STANLEY LONG TERM CAP GAIN DISTRI **VARIOUS** VARIOUS 1,894 0 1,894. **b** Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b 6b 7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 7 8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts Capital gain distributions 9 Gain from Form 4797, Part I 10 Long-term capital loss carryover Enter the amount, if any, from line 14, of the 2009 Capital Loss Carryover Worksheet 11 -2,587,615. Net long-term gain or (loss). Combine lines 6a through 11 in column (f) Enter here and on line 14a, -2,600,157.column (3) on page 2 12

	edule D (Form 1041) 2010 HELEN K AND JAMES S	CO	PLEY FOUNDATION	95-	<u> 6051</u>	. <u>770 Page 2</u>
Par	t III Summary of Parts I and II		(1) Beneficiaries'	(2)		(3)
	Caution: Read the instructions before completing this pa	ert	(see instructions)	Estate's or trus		Tòtal
13	Net short-term gain or (loss)	13		-110,8	16.	110,816.
	Net long-term gain or (loss):					
a	Total for year	14a		-2,600,1	57.	-2,600,157.
Ŀ	Unrecaptured section 1250 gain (see line 18 of the worksheet					
	in the instructions)	14b				
	: 28% rate gain	14 c				
	Total net gain or (loss). Combine lines 13 and 14a	15		-2,710,9	73.	-2,710,973.
Note	: If line 15, column (3), is a net gain, enter the gain on Form 10	41. lin	ne 4 (or Form 990-T. Pa	rt I. line 4a) If lin	es 14	a and 15. column (2).
are i	net gains, go to Part V, and do not complete Part IV If line 15, o yover Worksheet, as necessary	colum	n (3), ıs a net loss, com	plete Part IV and	the C	Capital Loss
	t IV Capital Loss Limitation		· · · · · · · · · · · · · · · · · · ·			
	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line	Ac if	a truct) the emaller of			
	The loss on line 15, column (3) or b \$3,000	5 46, II d	a trust), the sinaher of		16	3,000.
	: If the loss on line 15, column (3), is more than \$3,000, or if Fo	rm 10	041 nage 1 line 22 (or	 Form 990-T line		
Capi	ital Loss Carryover Worksheet in the instructions to figure your	capıta	l loss carryover	TOTTI JOO T, TIME	J-7, 13	a 1033, complete the
Par	t V Tax Computation Using Maximum Capital Ga	ins F	Rates			
Forn	n 1041 filers. Complete this part only if both lines 14a and 15 in	colum	nn (2) are gains, or an a	mount is entered	ın Pa	irt I or Part II and there
	entry on Form 1041, line 2b(2), and Form 1041, line 22, is more		zero			
	t ion: Skip this part and complete the worksheet in the instruction					
	Either line 14b, column (2) or line 14c, column (2) is more than z					
• E	Both Form 1041, line 2b(1), and Form 4952, line 4g are more tha	n zero	0			
Form	n 990-T trusts. Complete this part only if both lines 14a and 15 an 990-T, and Form 990-T, line 34 is more than zero. Skip this part (2) or line 14c, column (2) is more than zero.	re gar rt and	ins, or qualified dividend complete the workshee	ds are included in et in the instructio	incor ns if e	ne in Part I of either line 14b,
17	Enter taxable income from Form 1041, line 22 (or Form 990-T,	lıne 3	4) 17			
18	Enter the smaller of line 14a or 15 in column (2)					
	but not less than zero					
19	Enter the estate's or trust's qualified dividends		[]			
	from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of					
	Form 990-T) 19					
20	Add lines 18 and 19 20					
21	If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0-					
22	Subtract line 21 from line 20 If zero or less, enter -0-		22			
23	Subtract line 22 from line 17 If zero or less, enter -0-		23			
24	Enter the smaller of the amount on line 17 or \$2,300		24			
	Is the amount on line 23 equal to or more than the amount on	line 2/		-		
LJ	Yes. Skip lines 25 and 26, go to line 27 and check the 'No'		T			
	No. Enter the amount from line 23	DOX	25			
26	Subtract line 25 from line 24		26			
	Are the amounts on lines 22 and 26 the same?					ı.
	Yes. Skip lines 27 through 30, go to line 31 No. Enter the smaller o	f line 17	or line 22 27			
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)		28	_		
20	Subtract line 28 from line 27		29			
29 30	Multiply line 29 by 15% (15)		23		30	
	Figure the tax on the amount on line 23 Use the 2010 Tax Rat	e Sch	edule for Estates and T	rusts (see the	30	
31	Schedule G instructions in the instructions for Form 1041)	- JUI	cadic for Estates afful I	idoto (oce the	31	
	4.111 20 121				20	
32	Add lines 30 and 31	- 0-1	adula fas Fat-t : ! *		32	
	Figure the tax on the amount on line 17 Use the 2010 Tax Rat Schedule G instructions in the instructions for Form 1041)			rusts (see the	33	
34	Tax on all taxable income. Enter the smaller of line 32 or line 3 on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)	33 her	re and		34	

Form 990-PF (2010) HELEN K. & JAMES S. COPLEY FOUNDATION 95-6051770 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

	•	-	-					Yes	No
de	d the organization direct escribed in section 501 (or lating to political organization	c) of the Code (o	engage in any of ther than section	the following win 501(c)(3) organ	th any other organiz nizations) or in secti	ation on 527,		103	
	ansfers from the reporti		a noncharitable	e exempt organiz	ation of				
(1)) Cash						1 a (1)		X
(2)) Other assets						1 a (2)		<u>X</u>
	her transactions								·
•) Sales of assets to a n						1 b (1)		X
•	Purchases of assets for			anızatıon			1 b (2)		X
•	Rental of facilities, eq	•	er assets				1 b (3)		X
•	Reimbursement arran	-					1b (4)		X
	 Loans or loan guarant Performance of service 		un or fundraisin	r collectations			1 b (5) 1 b (6)		X
•	naring of facilities, equip		•	•	PP2		1c		$\frac{\lambda}{X}$
C 01	laring or lacinties, equip	mient, maning n	sis, other assets	, or paid cripicy	CC3				
th	the answer to any of the e goods, other assets, o ly transaction or sharing	r services given	by the reporting	i foundation. If th	ne foundation receiv	ed less than fair marke	t value in	ue of	
(a) Line	-		of noncharitable exer		T	transfers, transactions, and		ngement	<u></u>
N/A									
						_			
					-				
		_			-				
				-					
		-							
						· · · · · · · · · · · · · · · · · · ·			
de	the foundation directly described in section 501(c	:) of the Code (o	ated with, or rel ther than section	ated to, one or n n 501(c)(3)) or in	nore tax-exempt org section 527?	anizations	Yes	X	No
<u> b II</u>	'Yes,' complete the follo		(h) Tura	- of organization	<u> </u>	(a) Description of role	t.ooob.o		
N/A	(a) Name of organiz	alion	(6) Typ	e of organization		(c) Description of rela	ationship		
IV/ A									
	<u>.</u>								
·									
	Under penalties of perjury, I decorrect, and complete Declarat	clare that I have exam	ined this return, inclu	ding accompanying so	hedules and statements, a	nd to the best of my knowledge	and belief, i	t is true,	
Sign	correct, and complete Declarat	ion of preparer (other	than taxpayer or nou	ciary) is based on all r	mormation of which prepar	er has any knowledge			
Here	9.00 D.	Dung	_ لما		111-14-1	TREASURER			
i ieie	Signature of officer or trust		$\overline{}$		Date	Title			
	Print/Type preparer's		Preparer's	signature	Date	Check if X if	PTIN		
Paid	L. SCOTT S	HIELDS, CP	\mathbf{A}	X 0	M/10/	self-employed	P00368	3722	
Prepar			SHIELDS	(A)		Firm's EIN ►			
Use O	nlv	9820 WILL		DAD, STE. 2	285			-	
	Firm's address	SAN DIEGO,	CA 92131			Phone no (858) 577-	<u> 383</u> 0	
BAA							Form 99	0-PF (2010)

SCHEDULE D (Form 1041)

Capital Gains and Losses

OMB No 1545-0092

Employer identification number

Department of the Treasury Internal Revenue Şervice

Name of estate or trust

► Attach to Form 1041, Form 5227, or Form 990-T. See the Instructions for Schedule D (Form 1041) (also for Form 5227 or Form 990-T, if applicable).

2010

HELEN K AND JAMES S COPLEY FOUNDATION 95-6051770 Note: Form 5227 filers need to complete only Parts I and II - Assets Held One Year or Less Part I **Short-Term Capital Gains and Losses** (d) (a) (e) **(f)** Description of property (Example 100 shares Gain or (loss) for the entire year Date sold Date acquired Sales price Cost or 1a (mo, day, yr) (mo, day, yr) other basis 7'% preferred of 'Z' Co) (see instructions) Subtract (e) from (d) 9102.22 JP MORGAN SHORT DURATION BOND **FUND** 12/01/10 11/30/10 9,972 100,307 90,335. b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b 1 b 2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts 3 Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2009 Capital Loss Carryover Worksheet 4 -201,151. Net short-term gain or (loss). Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on page 2 5 -110,816. Part Il Long-Term Capital Gains and Losses -**Assets Held More Than One Year** Description of property (Example 100 shares 7% preferred of 'Z' Co) Cost or Date acquired Date sold Gain or (loss) Sales price 6a (mo, day, yr) (mo, day, yr) other basis for the entire year Subtract (e) from (d) (see instructions) 90654.97 JP MORGAN SHORT DURATION BOND FUND 11/02/09 11/30/10 999,018 975,704 23,314. 8991.784 SELECT INVEST MULTUSTRATEGY LTD 6/01/07 1/01/10 83,227 89,918 -6,691.18201.175 SELECT INVEST MULTISTRATEGY LTD 6/01/07 7/01/10 167,460 182,012 -14,552. 32435.452 SELECT INVEST MULTISTRATEGY LTD 6/01/07 11/01/10 307,847. 324,354 -16,507. MORGAN STANLEY LONG TERM CAP GAIN DISTRI VARIOUS VARIOUS 1,894 0. 1,894. b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b 6b 7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 7 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts 8 Capital gain distributions 9 Gain from Form 4797, Part I 10 ຺10 Long-term capital loss carryover Enter the amount, if any, from line 14, of the 2009 Capital Loss Carryover Worksheet -2,587,615.11 Net long-term gain or (loss). Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on page 2 -2,600,157.

	dale o (Louin 1041) 5010 HETER V VIND OWNES 3	<u> </u>	FLEI FOUNDALIO	<u> </u>	0021	.770 Page_Z
Par	till Summary of Parts I and II Caution: Read the instructions before completing this pa	art	(1) Beneficiaries' (see instructions)	(2) Estate's or tru	st's	(3) Total
13	Net short-term gain or (loss)	13		-110,8		-110,816.
	Net long-term gain or (loss):					
	Total for year	14a		-2,600,1	L57.	-2,600,157.
Ł	Unrecaptured section 1250 gain (see line 18 of the worksheet in the instructions)	14Ь				
	: 28% rate gain	14c				
	Total net gain or (loss). Combine lines 13 and 14a	15	<u></u>	-2,710,9		-2,710,973.
are r	: If line 15, column (3), is a net gain, enter the gain on Form 10 net gains, go to Part V, and do not complete Part IV If line 15, o yover Worksheet, as necessary	41, lın columi	e 4 (or Form 990-T, I n (3), is a net loss, co	Part I, line 4a) If lir omplete Part IV and	nes 14 I the C	a and 15, column (2), Capital Loss
Par	t IV Capital Loss Limitation					
16	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line	e 4c, if a	trust), the smaller of			
а	The loss on line 15, column (3) or b \$3,000				16	3,000.
Note	: If the loss on line 15, column (3), is more than \$3,000, or if Fo ital Loss Carryover Worksheet in the instructions to figure your o	orm 10 capita	41, page 1, line 22 (d Lloss carryover	or Form 990-T, line	34), 15	s a loss, complete the
Par		<u> </u>				
Form	1 1041 filers. Complete this part only if both lines 14a and 15 in	colum	in (2) are gains, or ar	amount is entered	I in Pa	art I or Part II and there
	entry on Form 1041, line 2b(2), and Form 1041, line 22, is more		zero			
	ion: Skip this part and complete the worksheet in the instruction					
	Either line 14b, column (2) or line 14c, column (2) is more than z					
• •	Both Form 1041, line 2b(1), and Form 4952, line 4g are more tha	n zero)			
Form	n 990-T trusts. Complete this part only if both lines 14a and 15 and 990-T, and Form 990-T, line 34 is more than zero. Skip this parm (2) or line 14c, column (2) is more than zero.	re gai rt and	ns, or qualified divide complete the worksh	ends are included in leet in the instruction	i incor ins if e	me in Part I of either line 14b,
17	Enter taxable income from Form 1041, line 22 (or Form 990-T,	line 3	4) 17			
18	Enter the smaller of line 14a or 15 in column (2) but not less than zero					
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)					
20	Add lines 18 and 19					
21	If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0-					
22	Subtract line 21 from line 20 If zero or less, enter -0-		22			
23	Subtract line 22 from line 17 If zero or less, enter -0-		23		1	
0.4	Take the annual and the annual and a 17 and 60 200					
	Enter the smaller of the amount on line 17 or \$2,300 ls the amount on line 23 equal to or more than the amount on	luna 2/	24		┨` ∦	
25	Yes. Skip lines 25 and 26, go to line 27 and check the 'No'		' '			
	No. Enter the amount from line 23	DUX	25			
26	Subtract line 25 from line 24		26		j !	
-	Are the amounts on lines 22 and 26 the same?				f !	
	Yes. Skip lines 27 through 30, go to line 31 No. Enter the smaller of	f line 17	or line 22 27			
28	Enter the amount from line 26 (If line 26 is blank, enter -0-)		28			
29	Subtract line 28 from line 27		29		l	
30	Multiply line 29 by 15% (15)	٠.			30	
31	Figure the tax on the amount on line 23 Use the 2010 Tax Rate Schedule G instructions in the instructions for Form 1041)	e Sch	edule for Estates and	rusts (see the	31	
	Add lines 30 and 31				32	
33	Figure the tax on the amount on line 17 Use the 2010 Tax Rat Schedule G instructions in the instructions for Form 1041)			Trusts (see the	33	
34	Tax on all taxable income. Enter the smaller of line 32 or line 3 on Form 1041, Schedule G, line 1a (or Form 990-T, line 36)	33 her	e and		34	

	_	_
20	•	n
/U		u

FEDERAL STATEMENTS

PAGE 1

HELEN K. & JAMES S. COPLEY FOUNDATION

95-6051770

STATEMENT 1 FORM 990-PF, PART I, LINE 11 OTHER INCOME

(A)	(B) NET	(C)
REVENUE	INVESTMENT	ADJUSTED
PER BOOKS	INCOME	NET INCOME

PUTNAM FAIR FUND SETTLMNT

	\$ 618.		
TOTAL	\$ 618.\$	0.\$	0.

STATEMENT 2 FORM 990-PF, PART I, LINE 18 TAXES

			(A)		(B) NET	(C)		•	D)
			ENSES	IN	VESTMENT	ADJUS:			TABLE
		<u>PER</u>	BOOKS		INCOME	<u>NET INC</u>	COME_	<u>PURF</u>	POSES
TAXES & MISC		\$	1,039.	\$	1,039.				
	TOTAL	\$	1,039.	\$	1,039.	\$	0.	\$	0.

STATEMENT 3 FORM 990-PF, PART I, LINE 23 OTHER EXPENSES

		(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING INSURANCE PAYROLL PROCESSING	\$ TOTAL <u>\$</u>	4,250. 2,595. 1,641. 8,486.	\$ 4,250. 2,595. 1,641. \$ 8,486.	\$ 0.	\$ 0.

STATEMENT 4 FORM 990-PF, PART IV, LINE 1 CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM		(A) DES	CRIPTION		(B) ACOU		C) DATE COUIRED	(D) DATE SOLD
1	JPM SHORT		ND FD		PURCH		VARIOUS	VARIOUS
2	JPM SHORT	DURATION BO	ND FD		PURCH	IASED	VARIOUS	VARIOUS
3	MORGAN STA	ANLEY LONG T	ERM CAP G	AIN DISTRI	PURCE	IASED	VARIOUS	VARIOUS
4	8991.784	SELECTINVEST	' MULTISTR	ATEGY LTD	PURCE	IASED (6/01/2007	1/01/2010
5	18201.175	SELECTINVES	T MULTIST	RATEGY LTD	PURCE	IASED (6/01/2007	7/01/2010
6	32435.452	SELECTINVES	T MULTIST	RATEGY LTD	PURCH	IASED (6/01/2007	11/01/2000
	(E)	(F)	(G)	(H)	(I)	(J)	(K)	(L)
	GROSS	DEPREC.	COST	GAIN	FMV	ADJ. BAS	. EXCESS	GAIN
ITEM	SALES	ALLOWED	BASIS	(LOSS)	12/31/69	12/31/69	(I) - (J)	(LOSS)

<u> </u>	SALES ALLOW	ED BASIS	(LOSS)	12/31/69 12/31/69	. <u>(1) - (J)</u>	 (TO22)
1	635.	0.	635.			\$ 635.
2	1098690.	1075376.	23,314.			23,314.
3	1,894.	0.	1,894.			1,894.

2010

FEDERAL STATEMENTS

PAGE 2

HELEN K. & JAMES S. COPLEY FOUNDATION

95-6051770

STATEMENT 4 (CONTINUED) FORM 990-PF, PART IV, LINE 1 CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
4	83,227.	TIBLONED	89,918.	-6,691.	12/31/05	12/31/05		\$ -6,691.
5	167,460.		182,012.	-14,552.				-14,552.
6	307,847.		324,354.	-16,507.				-16,507.
							TOTAL	<u>\$</u> −11,907.

STATEMENT 5 FORM 990-PF, PART VIII, LINE 1 LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DO	O ACCOUNT/
DAVID C. COPLEY PO BOX 1530 LA JOLLA, CA 92038	PRESIDENT 0	\$ (0.\$0	. \$ 0.
ROBERT CROUCH PO BOX 1530 LA JOLLA, CA 92038	VICE PRESIDENT 0	(0. 0	. 0.
CHARLES F. PATRICK PO BOX 1530 LA JOLLA, CA 92038	VICE PRESIDENT 0	(0. 0	. 0.
DEAN DWYER PO BOX 1530 LA JOLLA, CA 92038	TREASURER 0	(0. 0	. 0.
KIM KOCH PO BOX 1530 LA JOLLA, CA 92038	SECRETARY 0	(0. 0	. 0.
	TOTAL	\$ (<u>\$</u> 0	<u>\$</u> 0.

STATEMENT 6 FORM 990-PF, PART XV, LINE 2A-D APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:

HELEN K AND JAMES S COPLEY GRANTS

NAME:

KIM KOCH

PO BOX 1530

CARE OF: STREET ADDRESS: CITY, STATE, ZIP CODE:

LA JOLLA, CA 92038

TELEPHONE:

(858) 454-0411

FORM AND CONTENT:

LETTER OUTLINING SPECIFIC NEED WITH COPY OF TAX EXEMPT CERTIFICATE, LIST OF BOARD/TRUSTEE MEMBERS, FINACIAL

BUDGETARY INFORMATION.

2010

FEDERAL STATEMENTS

PAGE 3

HELEN K. & JAMES S. COPLEY FOUNDATION

95-6051770

STATEMENT 6 (CONTINUED) FORM 990-PF, PART XV, LINE 2A-D APPLICATION SUBMISSION INFORMATION

SUBMISSION DEADLINES: RESTRICTIONS ON AWARDS:

IS GENERALLY JAN.2, THE ANNUAL MEETING IS GENERALLY IN MAY LIMITED PRIMARILY TO THE IMMEDIATE CIRCULATION AREAS OF COPLEY NEWPAPERS LOCATED IN CALIFORNIA, ILLINOIS AND OHIO.

HELEN K. & JAMES S. COPLEY FOUNDATION STATEMENT OF CHARITABLE CONTRIBUTIONS FOR TWELVE MONTHS ENDED DECEMBER 31, 2010

Payee Organization		Payment
Arts and Culture		
Abraham Lincoln Presidential Library Foundat	ion	\$200,000
La Jolla Playhouse		\$300,000
Museum Of Contemporary Art, San Diego		\$428,600
Old Globe Theatre		\$200,000
Playwrights Project		\$1,000
San Diego History Center		\$5,000
San Diego Museum of Art		-\$5,000
San Diego Museum of Art		\$5,000
San Diego Museum of Art		\$10,000
San Diego Opera		\$50,000
San Diego Symphony		\$10,000
Children's Museum / Museo de los Ninos		\$100,000
Timken Museum of Art		\$10,000
Total .	Arts and Culture	\$1,314,600
Civic and Community		\$75,000
San Diego Crew Classic		•
San Diego Public Library Foundation		\$666,666
The Zoological Society of San Diego		\$10,000
Total Civic	and Community	\$751,667
Education		
Adobe Bluffs Educational Foundation		\$250
Borrego Springs Unified School District		\$1,000
Borrego Springs Unified School District		\$1,000
Monarch School		\$20,000
Nativity Prep Academy		\$1,000
Nativity Prep Academy		\$1,000
Ottawa University		\$1,000
Ottawa University		\$1,000
Ottawa University		\$1,000
Reading Literacy Learning, Inc		\$16,000
Southern Illinois University Foundation		\$750
St. Charles Borromeo School		\$1,000
St. Jerome School		\$1,000
Syracuse University		\$1,000
The UCLA Foundation		\$1,000,000
The UCLA Foundation		\$1,000,000
The UCLA Foundation		\$1,000,000
University of Missouri		\$3,000
	Total Education	\$3,050,000
	i Otai Education	\$5,050,000

<u>Human Services</u>	
Big Brothers Big Sisters of San Diego County	\$5,000
Canine Companions for Independence	\$10,000
'Devil Pups, Inc.	\$1,500
Helen Woodward Anımal Center	\$1,000
Mama's Kıtchen	\$1,000
Voices for Children	\$1,000
Total Human Services	\$19,500
Medical and Health	
Emilio Nares Foundation	\$750
SHARP HealthCare Foundation, San Diego	\$500,000
Total Medical and Health	\$500,750
<u>Other</u>	
Aurora Cemetery Company	\$750
Total Other	\$750
Count Tatal	es (27.2/7.
Grand Total _	\$5,637,267

.



Statement of Charitable Contributions

12/31/2010

Fiscal Year 2010

Recipient and/or Purpose	Tax Status	Amount Paid 2010
Abraham Lincoln Presidential Library	501c(3)	\$200,000.00
Foundation	• •	,
500 E. Madison St.		
Suite 200		
Springfield, IL 62701		
Museum Support		
\$400,000.00		
2009		
Adobe Bluffs Educational Foundation	Non-profit	\$250.00
8707 Adobe Bluffs Drive	organization	
San Diego, CA 92129-4448		
m/g - Anıta Ta		
\$250.00		
2010		
Aurora Cemetery Company	Non-profit	\$750.00
Spring Lake Cemetery	organization	
745 South Lincoln Avenue		
Aurora, IL 60505		
Improvement Fund Trust #157		
\$7,500.00		
2006	501()(0)	
Big Brothers Big Sisters of San Diego	501(c)(3)	\$5,000.00
County		
8515 Arjons Drive, Suite A		
San Diego, CA 92126		
Operation Bigs		
\$5,000.00 2010		
Borrego Springs Unified School District	Other	\$1,000.00
1315 Palm Canyon Drive	Julei	\$1,000.00
Borrego Springs, CA 92004		
m/g - A. Navarro		
\$1,000 00		
2010		
Borrego Springs Unified School District	Other	\$1,000.00
1315 Palm Canyon Drive		41,000.00
Borrego Springs, CA 92004		
m/g - E. Carr		
\$1,000.00		
2010		

Canine Companions for Independence	501c(3)	\$10,000.00
Southwest Regional Center		
P. O. Box 4568		
Oceanside, CA 92052-4568		
Sponsor Two Canine Companion Dogs		
\$10,000.00 2010		
Devil Pups, Inc.	501-(2)	71.500.00
	501c(3)	\$1,500.00
3027 Townsgate Road Suite 210		
Westlake Village, CA 91361		
2010 Emcampment Program \$1,500.00		
2010		
Emilio Nares Foundation	501c(3)	\$750.00
P.O. Box 86165	3010(3)	\$730.00
San Diego, CA 92138-6165		
New Car Seats		
\$750.00		
2010		
Helen Woodward Animal Center	501c(3)	\$1,000.00
P. O. Box 64		\$1,000.00
Rancho Santa Fe, CA 92067		
AnıMobile Program		
\$1,000.00		
2010		
Theatre & Arts Foundation of SD County	501c(3)	\$300,000.00
P. O. Box 12039		
La Jolla, CA 92039		
Artistic Innovation Initiative		
\$1,200,000.00		
2007		
Mama's Kitchen	501c(3)	\$1,000.00
1875 Second Avenue		
San Diego, CA 92101		
Children's Nutritional Health Program		
\$1,000 00		
2010		
Monarch High School Project 808 West Cedar Street	501c(3)	\$20,000.00
San Diego, CA 92101		
After School Program		
\$20,000.00		
2010		
Museum Of Contemporary Art, San Diego	501c(3)	\$428,600 00
700 Prospect Street	,	, ,
La Jolla, CA 92037		
21st Century Campaign-Downtown		

Facility •		
\$3,000,200.00		
2004	501 (2)	
Nativity Prep Academy 3233 Market Street	501c(3)	\$1,000.00
San Diego, CA 92102		
m/g - Vargas		
\$1,000 00		
2010	501 (2)	** ***
Nativity Prep Academy 3233 Market Street	501c(3)	\$1,000.00
San Diego, CA 92102		
D.Dwyer - m/g		
\$1,000.00 2010		
Old Globe Theatre	501-(2)	#200 000 00
P. O. Box 122171	501c(3)	\$200,000.00
San Diego, CA 92112		
Securing a San Diego Landmark		
\$200,000.00		
2009		
Ottawa University	Other	\$1,000,00
1001 S. Cedar	Other	\$1,000.00
Ottawa, KS 66067-3399		
m/g - V. Perrine (Zorro)		
\$1,000.00		
2010		
Ottawa University	Other	\$1,000.00
1001 S. Cedar		\$1,000.00
Ottawa, KS 66067-3399		
m/g - A. Navarro (Zorro)		
\$1,000.00		
2010		
Ottawa University	Other	\$1,000.00
1001 S. Cedar		,
Ottawa, KS 66067-3399		
m/g - E. Carr		
\$1,000 00		
2010		
Playwrights Project	501c(3)	\$1,000.00
2590 Truxtun Road		
Suite 202		
San Diego, CA 92106		
Plays by Young Writers		
\$1,000 00		
2010		
Reading Literacy Learning, Inc.	501c(3)	\$16,000.00
4455 Federal Blvd., Suite #64		

San Diego, CA*92102 <i>Annual Book Party - 2010</i> \$16,000.00 2010 San Diego Crew Classic	501c(3)	\$75,000 00
1875 Quivira Way, C-6 San Diego, CA 92109 2010 Crew Classic \$75,000 00		
2010 San Diego History Center 1649 El Prado San Diego, CA 92101 K-12 Education Programs	501c(3)	\$5,000.00
\$10,000.00		
San Diego Museum of Art Balboa Park P.O. Box 122107	501c(3)	\$10,000.00
San Diego, CA 92112-2107 Education and Outreach Programs \$10,000.00 2010		
San Diego Opera Assocation 1200 Third Avenue 18th Floor San Diego, CA 92101-4112 2010-11 Student Night at the Opera \$50,000.00	501c(3)	\$50,000.00
2010 San Diego Public Library Foundation 820 E Street	501c(3)	\$666,667 00
San Diego, CA 92101-6478 Central Library Building Project \$2,000,000 00 2010 San Diego Symphony Ovekertye	501 (0)	
San Diego Symphony Orchestra Association Copley Symphony Hall 1245 Seventh Avenue San Diego, CA 92101 Music Education and Outreach \$10,000.00	501c(3)	\$10,000.00
2010 SHARP HealthCare San Diego, Inc. 8695 Spectrum Center Boulevard San Diego, CA 92123 The Campaign for Sharp HealthCare	501c(3)	\$500,000.00

\$5,000,000.00		
2005	404 (4)	
Southern Illinois University Foundation	501c(3)	\$750.00
Colyer Hall - Mail Code 6805 Carbondale, IL 62901-9988		
m/g - Povse		
\$750.00		
2010		
St. Charles Borromeo School	School	\$1,000.00
288 E Jefferson Ave.	23/133/	Ψ1,000.00
Hampshire, IL 60140		
m/g - P Warner		
\$1,000.00		
2010		
St. Jerome School	501c(3)	\$1,000.00
222 Alexander Avenue		
Bronx, NY 10454-3800		
m/g - Vargas		
\$1,000.00		
2010		
Syracuse University	501c(3)	\$1,000.00
820 Comstock Avenue Syracuse, NY 13244		
m/g - E Prina (CNS DC)		
\$1,000 00		
2010		
The New Childrens Museum	501c(3)	\$100,000.00
200 West Island Avenue	0010(0)	Ψ100,000.00
San Diego, CA 92101		
Capital and Programmatic Aspects		
\$100,000.00		
2010		
The Putnam Foundation	509a(1)	\$10,000.00
1500 El Prado		
Balboa Park		
San Diego, CA 92101		
Arts Education Program		
\$10,000.00 2010		
UCLA Foundation Charitable Fund	501c(3)	\$3,000,000.00
P. O. Box 24209	3010(3)	\$3,000,000.00
Los Angeles, CA 90024-0909		
The David C. Copley Center /		
The David C Copley Chair		
\$6,000,000.00		
2008		
University of Missouri	Non-profit	\$3,000.00

School of Journalism	organization	
102 Jay H Neff Hall	_	
Columbia, MO 65211		
Copley Newspapers Scholarship Program		
\$9,000.00		
2008		
Voices for Children	501c(3)	\$1,000.00
2851 Meadow Lark Drive		
San Diego, CA 92123		
CASA Program		
\$1,000 00		
2010		
The Zoological Society of San Diego	501c(3)	\$10,000.00
P. O. Box 120551		
San Diego, CA 92112-0551		
Institute for Conservation Research		
\$10,000.00		
2010		
Grand Totals (39 items)		\$5,637,267.00

HELEN K. & JAMES S. COPLEY FOUNDATION December 31, 2010 Schedule of Unpaid Charitable Pledges

	TOTAL PLEDGE	BALANCE DUE	PAYABLE 2011	PAYABLE 2012	PAYABLE 2013	PAYABLE 2014	PAYABLE 2015
Copley Family YMCA (Quarterly)* SHARP Healthcare Foundation San Diego Public Library Foundation** (pd in Aug) Museum of Contemporary Art San Diego (pd in June) Aurora Cemetary (Paid annually in Dec)	3,200,000 5,000,000 2,000,000 3,000,200	3,000,000 2,000,000 1,333,333 428,600 3750	500,000 666,667 428,600 750	1,000,000 500,000 666,666	2,000,000 500,000 -	500,000	
	Grand Totals \$13,200,200	\$6,765,683	\$1,596,017	\$2,167,416	\$2,500,750	\$500,750	\$750

Must start construction no later than August 2012.

^{**} Second payment due one year from construction start date of August 2010. Last payment due at project completion.

Form **8868**(Rev January 2011)

Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

File a separate application for each return.

OMB No 1545 1709

If you ar	re filing for an Automatic 3-Month Extensi	on, complete only	Part I and check this box		► X	
If you ar	re filing for an Additional (Not Automatic)	3-Month Extensio	n, complete only Part II (on page 2 of	this form)		
Do not com	nplete Part II unless you have already beer	granted an auton	natic 3-month extension on a previous	y filed Form 8868		
corporation request an e	iling (e-file). You can electronically file For required to file Form 990-T), or an addition extension of time to file any of the forms li With Certain Personal Benefit Contracts, with ling of this form, visit www.irs.gov/efile.and	nal (not automatic sted in Part I or P which must be sent) 3-month extension of time You can art II with the exception of Form 8870, to the IRS in paper format (see instri	electronically file Form Information Return for	i 8868 to r Transfers	
Partil A	Automatic 3-Month Extension of T	ime. Only subn	nit original (no copies needed).	-		
	on required to file Form 990-T and request			··· — ·-	•	
All other coi	rporations (including 1120-C filers), partne returns	rships, REMICS, a	and trusts must use Form 7004 to requ	est an extension of tim	ne to file	
	Name of exempt organization			Employer (dentification)	number	
Type or print File by the due date for	HELEN K. & JAMES S. COPLE Number, street, and room or suite number. If a P O b		N	95-6051770	_	
filing your return See	P. O. BOX 1530					
instructions	City, town or post office, state, and ZIP code. For a foreign address, see instructions					
	LA JOLLA, CA 92038			·		
Enter the Re	eturn code for the return that this applicati	on is for (file a se	parate application for each return)		04	
Application Is For		Return Code	Application Is For		Return Code	
Form 990		01	Form 990-T (corporation)		07	
Form 990-B	L	02	Form 1041-A		08	
Form 990-E.	Z	03	Form 4720		09	
Form 990-P	F	04	Form 5227		10	
Form 990-T	(section 401(a) or 408(a) trust)	05	Form 6069		11	
Form 990-T	(trust other than above)	06	Form 8870		12	
Telephor If the ore If this is check the		n's four digit Group	e United States, check this box			
	ension is for					
1 reque	est an automatic 3-month (6 months for a	corporation require	ed to tile Form 990-T) extension of tim	ie		

until 8/15, 20 11, to file the exempt organization return for the organization named above The extension is for the organization's return for X calendar year 20 10 or tax year beginning _____, 20 ___, and ending 2 If the tax year entered in line 1 is for less than 12 months, check reason Initial return | Final return Change in accounting period 3a 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 3a |\$ 1,347. 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 1,776. 3b|\$ c Balance due. Subtract line 3b from line 3a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions 0.

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

BAA For Paperwork Reduction Act Notice, see Instructions.

Form 8868 (Rev 1-2011)

*** 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). Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed). Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed). Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed). Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed). Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed). Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed). Part II Additional (Not Automatic) 3-Month Extension of Time. Only file 1 Part II	Form 8868	3 (Rev 1-2011)					Page 2
Part II Additional (Not Automatic) 3-Month Extension, complete only Part I (on page 1)	• If you a	are filing for an Additional (Not Automatic) 3-Mont	h Extension	n, complete only Part II and check the	ns box	·	► X
Part Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).	Note. Only	complete Part II if you have already been granted	l an automa	tic 3-month extension on a previous	ly filed For	rm 8868	_
Name of exempt organization HeLEN K. & JAMES S. COPLEY FOUNDATION 95-6051770	• If you a	are filing for an Automatic 3-Month Extension, cor	nplete only	Part I (on page 1)			
HELEN K. & JAMES S. COPLEY FOUNDATION 95-6051770	Part II	Additional (Not Automatic) 3-Month Exte	ension of	Time. Only file the original (n	o copies	needed	1).
HELEN K. & JAMES S. COPLEY FOUNDATION 95-6051770		Name of exempt organization			Employer ide	ntification nu	mber
HELEN K. & JAMES S. COPLEY FOUNDATION 95-6051770	Type or						
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