Form 990-PF
Department of the Treasury
Internal Revenue Service

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

For calendar year 2002, or tax year beginning 2002, and ending 2002.

G Check all that apply

Initial return
Final return
Amended return
Address change
Name change

Use the IRS label
Otherwise, print or type
See Specific Instructions

Name of organization
F M KIRBY FOUNDATION, INC

Number and street (or P O box number if mail is not delivered to street address)
17 DEHART ST
PO BOX 151

City or town name and ZIP code
MORRISTOWN, NJ 07960-0151

Department of the Treasury or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

ID No 1545-0052

Internal Revenue Service

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

For calendar year 2002,


Check all that apply on the return

Final return
Amended return
Address change
Name change

Name of organization
F M KIRBY FOUNDATION, INC

Employer identification number
51-6017929

Telephone number (see page 10 of the instructions)
(973) 538-4800

Check type of organization
X Section 501(c)(3) exempt private foundation

Check all that apply

Section 501(a)(1) nonexempt charitable trust
Other tax-exempt private foundation

Fair market value of all assets at end of year (from Part II, col (c), line 16)
342,067,001

Analysis of Revenue and Expenses

(a) Revenue and expenses per books
(b) Net investment income
(c) Adjusted net income
(d) Disbursements for charitable purposes (cash basis only)

1 Contributions, gifts, grants, etc received

Check if this foundation is not required to attach Schedule G

2 Distributions from split-interest trusts

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

5a Gross rents

b (Net rental income or (loss))

-29,577,022

6 Capital gain net income (from Part IV, line 2)

7 Interest on investments

8 Other income (attach schedule)

9 Income modifications

10 Capital gains

11 Other income (attach schedule)

12 Total Add lines 1 through 11

-23,483,336

13 Compensation of officers, directors, trustees, etc

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule)

b Accounting fees (attach schedule)

c Other professional fees (attach schedule)

17 Interest

18 Taxes (attach schedule) (see page 13 of Schedule M-1)

19 Depreciation (attach schedule) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

24 Total operating and administrative expenses

Add lines 13 through 23

2,484,656

2,200,044

245,686

237,691

25 Contributions, gifts, grants paid

26 Total expenses and disbursements Add lines 24 and 25

20,418,484

2,200,044

245,686

20,045,199

27 Subtract line 26 from line 12

-43,901,820

b Net investment income (if negative, enter -0-)

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

3,893,642

5,848,000

For Paperwork Reduction Act Notice, see the instructions

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Form 990-PF (2002)
### Part II: Balance Sheets

<table>
<thead>
<tr>
<th>Account Description</th>
<th>Beginning of year</th>
<th>End of year</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(a) Book Value</td>
<td>(b) Book Value</td>
</tr>
<tr>
<td>1. Cash - non-interest-bearing</td>
<td>239,111</td>
<td>28,897</td>
</tr>
<tr>
<td>2. Savings and temporary cash investments</td>
<td>3,414,256</td>
<td>1,829,880</td>
</tr>
<tr>
<td>3. Accounts receivable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less allowance for doubtful accounts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Pledges receivable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less allowance for doubtful accounts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Grants receivable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Other notes and loans receivable (attach schedule)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less allowance for doubtful accounts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Inventories for sale or use</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Prepaid expenses and deferred charges</td>
<td>147,572</td>
<td>108,636</td>
</tr>
<tr>
<td>10a. Investments - U.S. and state government obligations (attach schedule)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10b. Investments - corporate stock (attach schedule)</td>
<td>450,918,295</td>
<td>409,732,197</td>
</tr>
<tr>
<td>10c. Investments - corporate bonds (attach schedule)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Investments - land buildings and equipment basis</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Less accumulated depreciation (attach schedule)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. Investments - mortgage loans</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. Investments - other (attach schedule)</td>
<td>12,392,212</td>
<td>9,509,017</td>
</tr>
<tr>
<td>14. Land buildings, and equipment basis</td>
<td>60,584</td>
<td></td>
</tr>
<tr>
<td>Less accumulated depreciation (attach schedule)</td>
<td>39,984</td>
<td>22,161</td>
</tr>
<tr>
<td>15. Other assets (describe)</td>
<td>424,862</td>
<td>518,411</td>
</tr>
<tr>
<td>16. Total assets (to be completed by all filers - see page 16 of the instructions)</td>
<td>467,558,469</td>
<td>421,747,638</td>
</tr>
<tr>
<td>17. Accounts payable and accrued expenses</td>
<td>349,881</td>
<td>273,870</td>
</tr>
<tr>
<td>18. Grants payable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19. Deferred revenue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20. Loans from officers, directors, trustees, and other disqualified persons</td>
<td></td>
<td></td>
</tr>
<tr>
<td>21. Mortgages and other notes payable (attach schedule)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>22. Other liabilities (describe)</td>
<td>4,490,000</td>
<td>2,657,000</td>
</tr>
<tr>
<td>23. Total liabilities (add lines 17 through 22)</td>
<td>4,839,881</td>
<td>2,930,870</td>
</tr>
</tbody>
</table>

### Part III: Analysis of Changes in Net Assets or Fund Balances

1. Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)  
   1.01. 462,718,588

2. Enter amount from Part I, line 27a  
   2. 462,718,588

3. Other increases not included in line 2 (itemize)  
   3. 462,718,588

4. Add lines 1, 2, and 3  
   4. 462,718,588

5. Decreases not included in line 2 (itemize)  
   5. 462,718,588

6. Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30  
   6. 462,718,588
Form PF (2002)

Page 3

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
Purchase (P) or Other (O)

(c) Date acquired (mo., day, yr.)

(d) Date sold (mo., day, yr.)

1a SEE PART IV SCHEDULE

1b

1c

1d

1e

(e) Gross sales price

(f) Depreciation allowed (or allowable)

(g) Cost or other basis plus expense of sale

(h) Gain or (loss)

(e) plus (f) minus (g)

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) Fair Market Value of asset as of 12/31/69

(j) Adjusted basis as of 12/31/69

(k) Excess of col (i) over col (j) if any

(l) Gain or (loss) (Col (h) gain minus col (k), but not less than 0-) or Losses (from col (h))

2 Capital gain net income or (net capital loss) {If gain, also enter in Part I, line 7

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)

If gain, also enter in Part I, line 8, column (c) (see pages 12 and 17 of the instructions)

If (loss), enter -0- in Part I, line 8

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 organization liable for the section 4942 tax on the distributable amount of any year in the base period? Yes [x] No

1 Enter the appropriate amount in each column for each year, see page 17 of the instructions before making any entries

(a) Base period years Calendar year

(b) Adjusted qualifying distributions

(c) Net value of noncharitable-use assets

(d) Distribution ratio

2 Total of line 1, column (d)

3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years

4 Enter the net value of noncharitable-use assets for 2002 from Part X, line 5

5 Multiply line 4 by line 3

6 Enter 1% of net investment income (1% of Part I, line 27b)

7 Add lines 5 and 6

8 Enter qualifying distributions from Part XII, line 4

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 17

JSA 2E1430 1000 Forin

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**Part VI**

**Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 17 of the instructions)**

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<thead>
<tr>
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**Part VII-A**

**Statements Regarding Activities**

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<tr>
<td>10</td>
<td>X</td>
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</tbody>
</table>

**Web site address**

![HTTP://FDNCENTER.ORG/GRANTMAKER/KIRBY](HTTP://FDNCENTER.ORG/GRANTMAKER/KIRBY)

**The books are in care of**

![F M KIRBY FOUNDATION, INC](F M KIRBY FOUNDATION, INC)

**Located at**

![27 DEHART ST, MORRISTOWN, NJ](27 DEHART ST, MORRISTOWN, NJ)

**ZIP+4**

![07960](07960)

**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 income received or accrued during the year**

![38,936](38,936)

**JSA**

![2E1449 1 000](2E1449 1 000)

**CED1IL F505 05/09/2003 10 11 21 V02-5 301222 000 6**
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

1a. During the year did the organization (either directly or indirectly)
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)
a disqualified person? Yes No
(3) Furnish goods services or facilities to (or accept them from) a disqualified person? Yes No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
Yes 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 No
(6) Agree to pay money or property to a government official? (Exception: Check "No"
if the organization 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 No
b. If any answer is "Yes" to la(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 19 of the instructions)?
Organizations relying on a current notice regarding disaster assistance check here.

2. Taxes on failure to distribute income (section 4942) (does not apply for years the organization was a private
operating foundation defined in section 4942(j)(3) or 4942(j)(5))
a. At the end of tax year 2002 did the organization have any undistributed income (lines 6d
and 6e, Part XIII) for tax year(s) beginning before 2002? Yes No
b. Are there any years listed in 2a for which the organization is not applying the provisions of section 4942(a)(2)
(relating to incorrect valuation of assets) in the year's undistributed income? (If applying section 4942(a)(2)
to all years listed, answer "No" and attach statement - see page 19 of the instructions)

3. Did the organization hold more than a 2% direct or indirect interest in any business
enterprise at any time during the year? Yes No
b. If "Yes" did it have excess business holdings in 2002 as a result of (1) any purchase by the organization
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 organization had excess business holdings in 2002)

4a. Did the organization invest during the year any amount in a manner that would jeopardize its charitable purposes?
b. Did the organization 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 2002?

5a. During the year did the organization 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 organization other than a charitable etc. organization described
in section 509(a)(1), (2), (3), or section 4940(d)(2)? Yes No
(5) Provide for any purpose other than religious charitable, scientific, literary, or
educational purposes or for the prevention of cruelty to children or animals? Yes No
b. If any answer is "Yes" to 5a(1)-(5) did any of the transactions fail to qualify under the exceptions described in
Regulations section 53 4945 or in a current notice regarding disaster assistance (see page 20 of the instructions)?
Organizations relying on a current notice regarding disaster assistance check here.
c. If the answer is "Yes" to question 5a(4) does the organization claim exemption from the
tax because it maintained expenditure responsibility for the grant?
If "Yes" attach the statement required by Regulations section 53 4945-5(d)

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

If you answered "Yes" to 6b, also file Form 8870.
**Part VIII**

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

1. List all officers, directors, trustees, foundation managers, and highly paid employees (see page 20 of the instructions)
   
<table>
<thead>
<tr>
<th>(a) Name and address</th>
<th>(b) Title and average hours per week devoted to position</th>
<th>(c) Compensation (If not paid, enter 0)</th>
<th>(d) Contributions to employee benefit plans and deferred compensation</th>
<th>(e) Expense account other allowances</th>
</tr>
</thead>
<tbody>
<tr>
<td>SEP STATEMENT 19</td>
<td></td>
<td>234,481</td>
<td>24,496</td>
<td>640</td>
</tr>
</tbody>
</table>

2. Compensation of five highest-paid employees (other than those included on line 1 - see page 20 of the instructions)
   If none, enter "NONE"

<table>
<thead>
<tr>
<th>(a) Name and address of each employee paid more than $50,000</th>
<th>(b) Title and average hours per week devoted to position</th>
<th>(c) Compensation</th>
<th>(d) Contributions to employee benefit plans and deferred compensation</th>
<th>(e) Expense account other allowances</th>
</tr>
</thead>
<tbody>
<tr>
<td>NONE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   **Total number of other employees paid over $50,000**
   
   | NONE |

3. Five highest-paid independent contractors for professional services - (see page 20 of the instructions)
   If none, enter "NONE"

<table>
<thead>
<tr>
<th>(a) Name and address of each person paid more than $50,000</th>
<th>(b) Type of service</th>
<th>(c) Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td>NONE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   **Total number of others receiving over $50,000 for professional services**
   
   | NONE |

**Part IX-A**

**Summary of Direct Charitable Activities**

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

<table>
<thead>
<tr>
<th>Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>NONE</td>
</tr>
</tbody>
</table>

---

**Form 990-PF (2002)**

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### Part IX-B: Summary of Program-Related Investments (see page 21 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

<table>
<thead>
<tr>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>NONE</td>
</tr>
</tbody>
</table>

All other program-related investments. See page 21 of the instructions.

<table>
<thead>
<tr>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>NONE</td>
</tr>
</tbody>
</table>

#### Total:
Add lines 1 through 3.

### Part X: Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 21 of the instructions)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
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<tr>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
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<tr>
<td>4</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
</tr>
</tbody>
</table>

#### Minimum investment return:
Enter 5% of line 5.

### Part XI: Distributable Amount (see page 23 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)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>1</td>
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<td>5</td>
<td></td>
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<tr>
<td>6</td>
<td></td>
</tr>
</tbody>
</table>

#### Minimum investment return from Part X, line 6:
Enter here and on Part V, line 8, and Part XIII, line 4.

### Part XII: Qualifying Distributions (see page 23 of the instructions)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td>1</td>
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<tr>
<td>4</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
</tr>
</tbody>
</table>

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.
### Undistributed Income (see page 24 of the instructions)

<table>
<thead>
<tr>
<th></th>
<th>(a)</th>
<th>(b)</th>
<th>(c)</th>
<th>(d)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Distributable amount for 2002 from Part XI line 7</td>
<td></td>
<td></td>
<td>18,746,716</td>
</tr>
<tr>
<td>2</td>
<td>Undistributed income if any as of the end of 2001</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>a Enter amount for 2001 only</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>b Total for prior years 2000</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td>3</td>
<td>Excess distributions carryover, if any to 2002</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>a From 1997</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>b From 1998</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>c From 1999</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>d From 2000</td>
<td></td>
<td></td>
<td>172,932</td>
</tr>
<tr>
<td></td>
<td>e From 2001</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td>f</td>
<td>Total of lines 3a through e</td>
<td></td>
<td></td>
<td>172,932</td>
</tr>
<tr>
<td>4</td>
<td>Qualifying distributions for 2002 from Part XII line 4</td>
<td></td>
<td>20,004,519</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a Applied to 2001, but not more than line 2a</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>b Applied to undistributed income of prior years (Election required - see page 24 of the instructions)</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>c Treated as distributions out of corpus (Election required - see page 24 of the instructions)</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>d Applied to 2002 distributable amount</td>
<td></td>
<td></td>
<td>19,746,716</td>
</tr>
<tr>
<td>e</td>
<td>Remaining amount distributed out of corpus</td>
<td></td>
<td></td>
<td>257,803</td>
</tr>
<tr>
<td>5</td>
<td>Excess distributions carryover applied to 2002 (if an amount appears in column (d), the same amount must be shown in column (a))</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td>6</td>
<td>Enter the net total of each column as indicated below</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>a Corpus Add lines 3f, 4c and 4e Subtract line 5</td>
<td></td>
<td></td>
<td>430,735</td>
</tr>
<tr>
<td></td>
<td>b Prior years undistributed income Subtract line 4b from line 2b</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>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</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>d Subtract line 6c from line 6b Taxable amount - see page 24 of the instructions</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>e Undistributed income for 2001 Subtract line 4a from line 2a Taxable amount - see page 24 of the instructions</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>f Undistributed income for 2002 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2003</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td>7</td>
<td>Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) (see page 24 of the instructions)</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td>8</td>
<td>Excess distributions carryover from 1997 not applied on line 5 or line 7 (see page 25 of the instructions)</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td>9</td>
<td>Excess distributions carryover to 2003 Subtract lines 7 and 8 from line 6a</td>
<td></td>
<td></td>
<td>430,735</td>
</tr>
<tr>
<td>10</td>
<td>Analysis of line 9</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>a Excess from 1998</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>b Excess from 1999</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>c Excess from 2000</td>
<td></td>
<td></td>
<td>172,932</td>
</tr>
<tr>
<td></td>
<td>d Excess from 2001</td>
<td></td>
<td></td>
<td>NONE</td>
</tr>
<tr>
<td></td>
<td>e Excess from 2002</td>
<td></td>
<td></td>
<td>257,803</td>
</tr>
</tbody>
</table>
Part XIV Private Operating Foundations (see page 25 of the instructions and Part VII-A, question 9) NOT APPLICABLE

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2002, enter the date of the ruling.

b Check box to indicate whether the organization is a private operating foundation 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 investment return from Part X for each year listed.

<table>
<thead>
<tr>
<th>Tax year</th>
<th>Prior 3 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a) 2002</td>
<td>(b) 2001</td>
</tr>
<tr>
<td>(c) 2000</td>
<td>(d) 1999</td>
</tr>
<tr>
<td>(e) Total</td>
<td></td>
</tr>
</tbody>
</table>

b 55% 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.

e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.

2b Complete 3a or c for the alternative test relied upon.

a Assets alternative test enter:

(1) Value of all assets

(b) Value of assets qualifying under section 4942(j)(3)(b)(5)

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:

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans, or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(b)(4)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV Supplementary Information (Complete this part only if the organization had $5,000 or more in assets at any time during the year - see page 25 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)).

N/A

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.

N/A

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs

Check here if the organization only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds.

If the organization makes gifts, grants, etc (see page 25 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.

SEE STATEMENT 13

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

SEE STATEMENT 14

c Any submission deadlines.

SEE STATEMENT 15

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

SEE STATEMENT 16
### Grants and Contributions Paid During the Year or Approved for Future Payment

<table>
<thead>
<tr>
<th>Recipient</th>
<th>If recipient is an individual show any relationship to any foundation manager or substantial contributor</th>
<th>Foundation status of recipient</th>
<th>Purpose of grant or contribution</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>a Paid during the year SEE STATEMENT 7A</td>
<td></td>
<td></td>
<td></td>
<td>19,766,828</td>
</tr>
<tr>
<td>b Approved for future payment SEE STATEMENT 17</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total**

| | 3a | 19,766,828 |

| | 3b | 2,657,000 |

---

Form 990-PF (2002)
### Part XVI-A  Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

<table>
<thead>
<tr>
<th>Unrelated business income</th>
<th>Excluded by section 512, 513 or 514</th>
<th>Related or exempt function income (See page 26 of the instructions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a) Business code</td>
<td>(b) Amount</td>
<td>(c) Exclusion code</td>
</tr>
</tbody>
</table>

1. Program service revenue
   - a
   - b
   - c
   - d
   - e
   - f Fees and contracts from government agencies
2. Membership dues and assessments
3. Interest on savings and temporary cash investments
4. Dividends and interest from securities
5. Net rental income or (loss) from real estate
   - a Debt-financed property
   - b Not debt-financed property
6. Net rental income or (loss) from personal property
7. Other investment income
   - 14 6,017,975
8. Gain or (loss) from sales of assets other than inventory
   - 18 -29,577,022
9. Net income or (loss) from special events
10. Gross profit or (loss) from sales of inventory
11. Other revenue
   - a
   - b
   - c
   - d
   - e
12. Subtotal
13. Total

Subtotal Add columns (b), (d), and (e) 12
Total Add line 12 columns (b), (d), and (e) 13

### 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 organization's exempt purposes (other than by providing funds for such purposes) (See page 26 of the instructions)

NOT APPLICABLE
### Part XVII

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

<table>
<thead>
<tr>
<th>Line no</th>
<th>Amount Involved</th>
<th>Name of noncharitable exempt organization</th>
<th>Description of transfers, transactions, and sharing arrangements</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a(1)</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1a(2)</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1b(1)</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1b(2)</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1b(3)</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1b(4)</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1b(5)</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1b(6)</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1c</td>
<td>X</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**2a**

Is the organization directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?  
- Yes [ ]  
- No [X]  

If "Yes," complete the following schedule:

<table>
<thead>
<tr>
<th>(a) Name of organization</th>
<th>(b) Type of organization</th>
<th>(c) Description of relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Under penalties of perjury, I declare that I have examined this return including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

**Signature of officer or trustee**

**Preparer’s name (or yours if self-employed)**

**Preparer’s signature**

**Firm’s name (or yours if self-employed)**

**Preparer’s address, and ZIP code**

**Signature of preparer**

**EISNER LLP**

**100 CAMPUS DRIVE-BOX 10-1121**

**FLORHAM PARK, NJ**
## FORM 990-PF - PART IV
### CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

<table>
<thead>
<tr>
<th>Kind of Property</th>
<th>Description</th>
<th>Date acquired</th>
<th>Date sold</th>
<th>Gross sale price less expenses of sale</th>
<th>Depreciation allowed/ allowable</th>
<th>Cost or other basis</th>
<th>FMV as of 12/31/09</th>
<th>Adj. basis as of 12/31/09</th>
<th>Excess of FMV over adj. basis</th>
<th>Gain or (loss)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SEE SCHEDULE D ATTACHMENT-BRANDES INVEST</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROPERTY TYPE SECURITIES</td>
<td>111553122</td>
<td>101947053</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>SEE SCHEDULE D ATTACHMENT-WADDELL &amp; REED</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROPERTY TYPE SECURITIES</td>
<td>58507413</td>
<td>73795961</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>SEE SCHEDULE D ATTACHMENT-MFS INSTITUTION</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PROPERTY TYPE SECURITIES</td>
<td>220738036</td>
<td>244632579</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>TOTAL GAIN(LOSS)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>-29577022</td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL GAIN(LOSS)**
<table>
<thead>
<tr>
<th>Description</th>
<th>Dividend and Interest Income</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Income Adjusted</td>
<td>6,017.975</td>
<td>6,017.975</td>
</tr>
<tr>
<td>Net Investment Income</td>
<td>6,017.975</td>
<td>6,017.975</td>
</tr>
<tr>
<td>Per Books and Expenses Revenue</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Form 990PF, Part I - Dividends and Interest from Securities

F.M. Kirby Foundation, Inc.
<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>ADJUSTED NET INCOME</th>
<th>NET INVESTMENT INCOME</th>
<th>REVENUE AND EXPENSES PER BOOKS</th>
<th>TOTALS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>75,711.</td>
<td>75,711.</td>
<td>75,711.</td>
<td></td>
</tr>
<tr>
<td>MISCellanEOUS</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## FORM 990PF, PART I - TAXES

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>REVENUE AND EXPENSES PER BOOKS</th>
<th>NET INVESTMENT INCOME</th>
<th>ADJUSTED NET INCOME</th>
<th>CHARITABLE PURPOSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAYROLL TAXES</td>
<td>21,373</td>
<td>10,686</td>
<td>10,687</td>
<td>10,687</td>
</tr>
<tr>
<td>FOREIGN TAXES PAID</td>
<td>1,072</td>
<td>1,072</td>
<td>NONE</td>
<td>NONE</td>
</tr>
<tr>
<td>FEDERAL EXCISE TAXES</td>
<td>38,936</td>
<td>NONE</td>
<td>NONE</td>
<td>NONE</td>
</tr>
<tr>
<td><strong>TOTA LS</strong></td>
<td><strong>61,381</strong></td>
<td><strong>11,758</strong></td>
<td><strong>10,687</strong></td>
<td><strong>10,687</strong></td>
</tr>
<tr>
<td></td>
<td>82'87</td>
<td>Totals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------</td>
<td>-------</td>
<td>--------</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>820</td>
<td></td>
<td></td>
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</tr>
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<td></td>
<td>746</td>
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<td>1,708</td>
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</tr>
<tr>
<td></td>
<td>1,923</td>
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<td></td>
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</tr>
<tr>
<td></td>
<td>3,967</td>
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<td></td>
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</tr>
<tr>
<td></td>
<td>8,753</td>
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<td></td>
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</tr>
<tr>
<td></td>
<td>22,133</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>41,683</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>POSTAGE</td>
</tr>
<tr>
<td>SERVICE CONTRACTS</td>
</tr>
<tr>
<td>OFFICE SUPPLIES</td>
</tr>
<tr>
<td>DUES &amp; PUBLICATIONS</td>
</tr>
<tr>
<td>TELEPHONE</td>
</tr>
<tr>
<td>REPAIRS &amp; MAINTENANCE</td>
</tr>
<tr>
<td>ONLINE SERVICES/INTERNET FEES</td>
</tr>
<tr>
<td>SOFTWARE MAINTENANCE &amp; SUPPORT</td>
</tr>
<tr>
<td>INSURANCE</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Form 990PF, Part I - OTHER EXPENSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>E.M. KIRBY FOUNDATION, INC.</td>
</tr>
<tr>
<td>Amount</td>
</tr>
<tr>
<td>------------</td>
</tr>
<tr>
<td>150,000</td>
</tr>
<tr>
<td>75,000</td>
</tr>
<tr>
<td>50,000</td>
</tr>
<tr>
<td>50,000</td>
</tr>
<tr>
<td>1,333,000</td>
</tr>
<tr>
<td>1,000,000</td>
</tr>
</tbody>
</table>

**TOTAL CONTRIBUTIONS PAID**: $19,766,828

**CIVIC AND COMMUNITY DEVELOPMENT**

**NOTE**: The amount listed above is the union's contribution to the union's campaign fund.
## F.M. KIRBY FOUNDATION, INC.

**Cumulative List of Grants**

January 1, 2002 through December 31, 2002

<table>
<thead>
<tr>
<th>Organization Description</th>
<th>Amount Paid</th>
</tr>
</thead>
</table>
| **Accuracy in Media, Inc.**  
  Washington, DC | $10,000 |
| **Action On Smoking And Health**  
  Washington, DC | $80,000 |
| **The Adirondack Council, Inc.**  
  Elizabethtown, NY  
  *For Acid Rain Awareness Campaign* | $30,000 |
| **The Adirondack Museum**  
  Blue Mountain Lake, NY | $15,000 |
| **Adirondack Nature Conservancy & Adirondack Land Trust**  
  Keene Valley, NY  
  *For Endowment components only of the Headwater's Capital Campaign-$200,000, $70,000 in 2000, $65,000 in 2001 and $65,000 in 2002* | $65,000 |
| **Adirondack Nature Conservancy & Adirondack Land Trust**  
  Keene Valley, NY | $25,000 |
| **AIDS Resource Foundation for Children**  
  Newark, NJ  
  *Final grant toward the Academy Street Firehouse Capital Campaign-$10,000* | $35,000 |
| **Albert Einstein College of Medicine of Yeshiva University**  
  Bronx, NY  
  *For The FM Kirby Program in Neural Repair and Protection* | $250,000 |
| **Alfre, Inc.**  
  Morristown, NJ | $15,000 |
| **The Alliance For Historic Hillsborough**  
  Hillsborough, NC  
  *Toward town clock restoration project-$5,000* | $20,000 |
| **Alzheimer's Association/Greater New Jersey Chapter**  
  Denville, NJ  
  *Toward programs based within the region previously covered by the former Northern New Jersey Chapter* | $15,000 |
<table>
<thead>
<tr>
<th>Organization</th>
<th>Project Description</th>
<th>Grant Amount Paid</th>
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<tr>
<td>Alzheimer's Disease and Related Disorders Association, Inc.</td>
<td>Chicago, IL</td>
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<tr>
<td></td>
<td>For Alzheimer's research</td>
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<tr>
<td>American Academy for Liberal Education</td>
<td>Washington, DC</td>
<td>$20,000</td>
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<tr>
<td>American Ballet Theatre</td>
<td>New York, NY</td>
<td>$25,000</td>
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<tr>
<td>American Cancer Society Foundation</td>
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<td>For Cancer Research</td>
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<td>American Cancer Society, Inc./Eastern Division</td>
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<td>For Programs in the Northwest New Jersey Region</td>
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<td>American Council on Science and Health</td>
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<td>For The adapted publication of &quot;Cigarettes What the Warning Label Doesn't Tell You&quot;-</td>
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<td>American Diabetes Association, Inc.</td>
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<td>For Diabetic cardiovascular research</td>
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<td>American Enterprise Institute for Public Policy Research</td>
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<td>American Federation for Aging Research</td>
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<td>For Basic research</td>
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<td>American Foundation for AIDS Research</td>
<td>New York, NY</td>
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<td>For Basic research on New Viral and Cellular Targets for HIV Drug Development</td>
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<td>American Foundation for the Blind, Inc.</td>
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<td>American Friends Service Committee</td>
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<td>For New Directions Youth Project-$15,000, Criminal Justice Program-$20,000</td>
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<tr>
<td><strong>Amount Paid</strong></td>
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<td><strong>Toward the AHA-Bugher Stroke Initiative Challenge</strong></td>
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<td><strong>Grant-$75,000</strong></td>
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<td><strong>American Red Cross of Morris Area</strong></td>
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<td>Morristown, NJ</td>
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<tr>
<td><strong>Toward disaster relief and blood donor programs</strong></td>
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<td><strong>American Red Cross/National Headquarters</strong></td>
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<td>Wilkes-Barre, PA</td>
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<td><strong>To fund new teaching equipment and classroom furniture</strong></td>
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<td><strong>America's Future Foundation</strong></td>
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<td>Washington, DC</td>
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<td><strong>For Campaign for Leadership-$5,000</strong></td>
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<td><strong>The Animal Medical Center</strong></td>
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<td><strong>Toward the Guide Dog Program</strong></td>
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<td><strong>The ARC/Morris County Chapter, New Jersey, Inc.</strong></td>
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<td><strong>Arthritis Foundation, Inc./National Office</strong></td>
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<td>Atlanta, GA</td>
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<td><strong>For Medical research only</strong></td>
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<td><strong>Arthritis Foundation/New Jersey Chapter</strong></td>
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<td>Iselin, NJ</td>
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<td><strong>For Research-$15,000</strong></td>
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<td>Bald Head Island, NC &lt;br&gt;For The purchase of technological equipment for environmental education programs</td>
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<td>BBB Wise Giving Alliance</td>
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<td>Washington, DC &lt;br&gt;For New Jersey Programs</td>
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<td>Bonnie Brae</td>
<td>Liberty Corner, NJ</td>
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<td>Boston Latin School Association</td>
<td>Boston, MA &lt;br&gt;For One-time grant in memory of Harry V Keefe and in support of the Keefe Library Book Fund</td>
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<td>Boy Scouts of America/Patriot's Path Council, Inc.</td>
<td>Mountainside, NJ &lt;br&gt;For Morris County programs</td>
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<td>Boys and Girls Club of Morris County, Inc.</td>
<td>Pequannock, NJ</td>
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<td>Chadds Ford, PA</td>
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<td><em>For Building for a New Century capital campaign in support of Museum construction:</em> $2,500</td>
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<td>The Brookings Institution</td>
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<td>The Browning School</td>
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<td>Bruce Museum of Arts and Science</td>
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<td>Greenwich, CT</td>
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<td>The Buffalo Fine Arts Academy</td>
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<td>Ridgewood, NJ</td>
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<td><em>For Services to residents of Morris County, NJ</em></td>
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<td>Cancer Research Institute, Inc.</td>
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<td>Capital Research Center</td>
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<td>Carolina Ballet, Inc.</td>
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<td>Raleigh, NC</td>
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<td>Carolina Theatre of Durham, Inc.</td>
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<td>Carrying Capacity Network, Inc.</td>
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<td>Cato Institute</td>
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<td>Washington, DC</td>
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<tr>
<td>Center for Child &amp; Family Health-North Carolina</td>
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<td>Durham, NC</td>
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<td>Organization</td>
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<td>Amount Paid</td>
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<tr>
<td>Center for Creative Leadership</td>
<td>Greensboro, NC</td>
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<td>Center for Equal Opportunity, Inc.</td>
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<td>Center For Individual Rights</td>
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<td>Center for Non-Profit Corporations, Inc.</td>
<td>North Brunswick, NJ</td>
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<td>Center for Responsive Politics</td>
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<tr>
<td>The Center on National Labor Policy, Inc.</td>
<td>North Springfield, VA</td>
<td>$17,500</td>
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<td>Central Park Conservancy</td>
<td>New York, NY</td>
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<td>Chatham Skate Park Committee</td>
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<td><em>For The Chatham Skate Park</em></td>
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<td>Cheshire Home, Inc.</td>
<td>Florham Park, NJ</td>
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<td><em>Toward renovation and update of four resident bathroom units</em></td>
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<td>Children’s Aid and Family Services, Inc.</td>
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<td><em>For Adoption Counseling and Support Services Programs</em></td>
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<td>Children’s Center for Therapy and Learning, Inc.</td>
<td>Cedar Knolls, NJ</td>
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<td><em>For The Early Care Program for Children with Autism</em></td>
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<td>Christian Appalachian Project</td>
<td>Lancaster, KY</td>
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<td>Christmas On The Green, Inc.</td>
<td>Morristown, NJ</td>
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<td>Organization</td>
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<td>Grant Amount Paid</td>
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<tr>
<td>The Christopher Reeve Paralysis Foundation</td>
<td>Springfield, NJ For Renewal and expansion of support of the Consortium laboratory efforts of Dr Carl W Cotman at the University of California Irvine</td>
<td>$150,000</td>
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<td>Citizens for a Sound Economy Foundation</td>
<td>Washington, DC For CSE Foundation-$10,000, New Jersey CSE Foundation-$15,000</td>
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<td>Clare Boothe Luce Policy Institute</td>
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<td>Collegiate Network, Inc.</td>
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<td>Communities In Schools of New Jersey, Inc.</td>
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<td>Community Hope, Inc.</td>
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<td>The Community Theatre</td>
<td>Morristown, NJ For Capital improvements-$50,000</td>
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<td>Cooper-Hewitt, National Design Museum</td>
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<td>Correll Institute for Medical Research, Inc.</td>
<td>Camden, NJ Toward the Barcoded Inventory Tracking System</td>
<td>$40,000</td>
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<td>Council of New Jersey Grantmakers, Inc.</td>
<td>Trenton, NJ</td>
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<td>Court Appointed Special Advocates of Morris &amp; Sussex Counties, Inc.</td>
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<td>Covenant House New Jersey, Inc.</td>
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<td>Organization</td>
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<tr>
<td>Criminal Justice Legal Foundation</td>
<td>Sacramento, CA</td>
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| Crohn's & Colitis Foundation of America, Inc.    | New York, NY  
  Toward support of Dr. R. Balfour Sartor's research at the University of North Carolina at Chapel Hill | $50,000           |
| Daughters of the American Revolution             | Morristown, NJ  
  For Schuyler-Hamilton House currently needed repairs | $5,000            |
| Defenders of Property Rights                     | Washington, DC                                                                       | $5,000            |
| Defense Forum Foundation, Inc.                   | Falls Church, VA                                                                     | $5,000            |
| Dolgeville Central School                        | Dolgeville, NY  
  For Jonathan A. Vedder Commencement Award | $1,000            |
| Duke University Medical Center                   | Durham, NC  
  Toward endowment campaign for the James Urbaniak Chair in Orthopedic Surgery | $50,000           |
| Durham Symphony Incorporated                     | Durham, NC  
  To support the Annual Durham Symphony Family Pops Concert in Historic Hillsborough's Cameron Park | $15,000           |
<p>| The Education and Research Foundation of the Better Business Bureau of Metropolitan New York, Inc. | New York, NY | $5,000 |
| Employment Horizons, Inc.                        | Cedar Knolls, NJ                                                                      | $30,000           |
| EngenderHealth                                   | New York, NY                                                                          | $70,000           |
| The English-Speaking Union of the United States  | New York, NY                                                                          | $7,500            |</p>
<table>
<thead>
<tr>
<th>Organization</th>
<th>Project Description</th>
<th>Grant Amount Paid</th>
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<tr>
<td>Environmental Defense, Inc.</td>
<td>To support activities to reduce nitrogen pollution in the Adirondacks-$75,000, like amount for like use in 2003</td>
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<td>Evergreen Freedom Foundation</td>
<td>Olympia, WA</td>
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<td>The Eye-Bank for Sight Restoration, Inc.</td>
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<td>F.M. Kirby Center for the Performing Arts</td>
<td>Wilkes-Barre, PA, For Children’s Cultural Education Endowment Fund-$50,000</td>
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<td>Family Service of Morris County</td>
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<td>The Federalist Society for Law &amp; Public Policy Studies</td>
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<td>Federation for American Immigration Reform</td>
<td>Washington, DC</td>
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<td>First Call For Help, Inc.</td>
<td>Parsippany, NJ, One-time support toward implementing 2-1-1 in Morris County, NJ</td>
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<td>First Night Morris, Inc.</td>
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<tr>
<td>The Foundation Center</td>
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<td>The Foundation Fighting Blindness, Inc.</td>
<td>Owings Mills, MD, For Retinal degenerative disease research</td>
<td>$60,000</td>
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<td>Foundation for Free Enterprise</td>
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<td>Foundation for New Jersey Public Broadcasting, Inc.</td>
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<td><em>For Closed captioning</em></td>
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<td>Foundation of the University of Medicine &amp; Dentistry of New Jersey</td>
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<td><em>Renewed support for Synaptic Interactions Formation and Plasticity and Brain Imaging and Memory, additional support for Cerebral Ischemic injury Mechanism and Repair</em></td>
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<td>Foundation of the University of Medicine &amp; Dentistry of New Jersey/Scleroderma Research Fund</td>
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<td><em>For Scleroderma research in memory of Hattie Frances Miller</em></td>
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<td>Fox Chase Cancer Center</td>
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<td><em>To endow the F M Kirby Postdoctoral Fellowship in Human Neurologic Disease and related educational program with Lafayette College</em></td>
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<td>The Franklin Institute</td>
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<td><em>To support the Exhibit Revitalization Plan and to name the F M Kirby Gallery of the Biosciences-$500,000, like amounts for like uses in each of the years 2003 and 2004</em></td>
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<td>Easton, PA&lt;br&gt;For Alumni Fund&lt;br&gt;Class of '42 - $10,000&lt;br&gt;Class of '80 - $1,000&lt;br&gt;Class of '81 - $2,000&lt;br&gt;Class of '84 - $5,000&lt;br&gt;Class of '87 - $1,000</td>
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<td>Lafayette College / Maroon Club</td>
<td>For Maroon Club-Football Program-Maroon Club-Swimming-Maroon Club-March</td>
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<td>For The Morris Williams Center for the Arts</td>
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<td>For Renovation and expansion of the Skillman Library</td>
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<td>The Lawrenceville School</td>
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<td>The Leukemia &amp; Lymphoma Society, Inc./Northern New Jersey Chapter</td>
<td>For Support of the Specialized Center of Research Program</td>
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<td>Liberty Science Center, Inc.</td>
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Statement 7A
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<td>Little Falls, NY Toward purchase of new radiographic-fluoroscopy system</td>
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<td>The Long Island Museum</td>
<td>Stony Brook, NY Toward support of educational programming in the Carriage Museum</td>
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<td>Maculloch Hall Historical Museum</td>
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<td>Madison Area YMCA</td>
<td>Madison, NJ Toward the FM Kirby Children's Center Annual Scholarship Fund</td>
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<td>Manhattan Institute for Policy Research, Inc.</td>
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<td>Market Street Mission, Inc.</td>
<td>Morrisstown, NJ</td>
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<td>The Marrow Foundation</td>
<td>Washington, DC Toward Dr. Shizuru's research of Post-Transplant Complications</td>
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<td>National Council For Adoption</td>
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<td>Toward the capital campaign to build the National Research and Training Institute for the Blind</td>
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<tr>
<td>National Right To Work Legal Defense Foundation, Inc.</td>
<td>$85,000</td>
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<td>Springfield, VA</td>
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<tr>
<td>National Transplant Assistance Fund, Inc.</td>
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<tr>
<td>Newtown Square, PA</td>
<td></td>
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<tr>
<td>Toward the In-Theatre Public Service Announcement Project</td>
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<tr>
<td>National Trust for Historic Preservation</td>
<td>$7,500</td>
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<tr>
<td>Washington, DC</td>
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<tr>
<td>The Nature Conservancy of New Jersey</td>
<td>$100,000</td>
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<tr>
<td>Chester, NJ</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Toward the Saving the Last Great Places of New Jersey campaign</td>
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<tr>
<td>Negative Population Growth, Inc.</td>
<td>$45,000</td>
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<tr>
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<tr>
<td>New Eyes for the Needy, Inc.</td>
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<tr>
<td>Short Hills, NJ</td>
<td></td>
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<tr>
<td>Organization</td>
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<td>Grant Amount Paid</td>
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<tr>
<td>New Jersey Audubon Society</td>
<td><strong>Construction costs at the Scherman-Hoffman Wildlife Sanctuary Education Center-$50,000, like amount pledged in 2003</strong></td>
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<td>New Jersey Coalition for Battered Women</td>
<td><em>For Matching funds for the Legal Services Project</em></td>
<td>$20,000</td>
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<tr>
<td>New Jersey Conservation Foundation</td>
<td><strong>For Farmland protection initiatives-$25,000</strong></td>
<td>$75,000</td>
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<td>New Jersey Family Policy Council, Inc.</td>
<td><strong>For Fatherhood Initiative-$6,000, Youth Initiative-$6,000</strong></td>
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<td>New Jersey GASP, Inc.</td>
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<tr>
<td>The New Jersey Historical Society</td>
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<td>New Jersey Performing Arts Center Corporation</td>
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<td>New Jersey SEEDS, Inc.</td>
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<tr>
<td>New Jersey Shakespeare Festival, Inc.</td>
<td><strong>For The S Dillard Kirby Endowment Fund-$50,000</strong></td>
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<td>New Jersey Theatre Alliance</td>
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<td>$7,500</td>
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<td>New Vernon Volunteer Fire Department, Inc.</td>
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<tr>
<td>New York Blood Center, Inc.</td>
<td><strong>For Fibrinogen project-$40,000, the cord blood program-$200,000</strong></td>
<td>$240,000</td>
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<td>Organization</td>
<td>Project Description</td>
<td>Grant Amount Paid</td>
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<tr>
<td>New York Botanical Garden</td>
<td>Bronx, NY</td>
<td>$35,000</td>
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<td>New York City Ballet, Inc.</td>
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<td>New York City Opera, Inc.</td>
<td>New York, NY</td>
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<tr>
<td>New York Public Library</td>
<td>New York, NY</td>
<td>$7,500</td>
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<tr>
<td>New York University School of Medicine</td>
<td>New York, NY</td>
<td>To support the Investigation of Low Molecular Weight Heparin as a Neuroprotective Agent for Stroke</td>
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<tr>
<td>Newark Academy</td>
<td>Livingston, NJ</td>
<td>$17,500</td>
</tr>
<tr>
<td>The Newark Museum</td>
<td>Newark, NJ</td>
<td>$35,000</td>
</tr>
<tr>
<td>Nightingale-Bamford School</td>
<td>New York, NY</td>
<td>$10,000</td>
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<tr>
<td>North Carolina Outward Bound School</td>
<td>Asheville, NC</td>
<td>For the F M Kirby Foundation Endowed Scholarship Fund</td>
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<tr>
<td>North Carolina School of the Arts Foundation, Inc.</td>
<td>Winston-Salem, NC</td>
<td>Towards the Building Hope capital campaign</td>
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<tr>
<td>North Jersey Community Research Initiative</td>
<td>Newark, NJ</td>
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**STATEMENT 7A**
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<tr>
<th>Organization</th>
<th>Project Description</th>
<th>Amount Paid</th>
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<tbody>
<tr>
<td>Oldfields School, Inc.</td>
<td>Glencoe, MD</td>
<td>$25,000</td>
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<tr>
<td>Orange Congregations in Mission</td>
<td>Hillsborough, NC</td>
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<tr>
<td>Outward Bound USA</td>
<td>Garrison, NY</td>
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<tr>
<td>Overlook Hospital Foundation</td>
<td>Summit, NJ</td>
<td>$45,000</td>
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<tr>
<td></td>
<td>For The Stroke Screening and Education Program</td>
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<tr>
<td>Pacific Legal Foundation</td>
<td>Sacramento, CA</td>
<td>$15,000</td>
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<tr>
<td>Paper Industry International Hall of Fame, Inc.</td>
<td>Appleton, WI</td>
<td>$25,000</td>
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<tr>
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<td>For Construction of World Paper Center</td>
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<tr>
<td>Paper Mill Playhouse</td>
<td>Millburn, NJ</td>
<td>$45,000</td>
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<tr>
<td>Partnership for a Drug-Free America, Inc.</td>
<td>New York, NY</td>
<td>$20,000</td>
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<tr>
<td>Partnership in Philanthropy</td>
<td>Chatham, NJ</td>
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<tr>
<td>The Peck School</td>
<td>Morristown, NJ</td>
<td>$50,000</td>
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<tr>
<td></td>
<td>For The Annual Giving Fund-$20,000, Reserved for Future Decision-$30,000</td>
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<tr>
<td>The Philanthropy Roundtable</td>
<td>Washington, DC</td>
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<tr>
<td>Pinelands Preservation Alliance, Inc.</td>
<td>Pemberton, NJ</td>
<td>$30,000</td>
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<tr>
<td>Plaid House, Inc.</td>
<td>Morristown, NJ</td>
<td>$10,000</td>
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<tr>
<td></td>
<td>Toward furniture and equipment needs</td>
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<tr>
<td>Organization</td>
<td>Project Description</td>
<td>Amount Paid</td>
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<tr>
<td>Planned Parenthood Federation of America, Inc.</td>
<td>New York, NY</td>
<td>$165,000</td>
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<tr>
<td></td>
<td><em>For General operating support, other than lobbying</em></td>
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<tr>
<td>Planned Parenthood of Greater Northern New Jersey, Inc.</td>
<td>Morristown, NJ</td>
<td>$70,000</td>
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<tr>
<td></td>
<td><em>For General operating support, other than lobbying, in Morris County only</em></td>
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<tr>
<td>Planned Parenthood of North East Pennsylvania, Inc.</td>
<td>Trexlertown, PA</td>
<td>$15,000</td>
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<tr>
<td></td>
<td><em>For General operating support, particularly Luzerne and Northampton counties</em></td>
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<tr>
<td>Planned Parenthood of Orange and Durham Counties, Inc.</td>
<td>Chapel Hill, NC</td>
<td>$17,500</td>
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<tr>
<td></td>
<td><em>For General operating support, other than lobbying, in Orange and Durham Counties</em></td>
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<tr>
<td>Playwrights Theatre of New Jersey, Inc.</td>
<td>Madison, NJ</td>
<td>$17,500</td>
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<tr>
<td>Population Action International</td>
<td>Washington, DC</td>
<td>$55,000</td>
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<tr>
<td>Population Council, Inc.</td>
<td>New York, NY</td>
<td>$50,000</td>
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<tr>
<td></td>
<td><em>For Support of a Postdoctoral Training Program in Reproductive Biology Research</em></td>
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<tr>
<td>The Population Institute</td>
<td>Washington, DC</td>
<td>$22,500</td>
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<tr>
<td>Population Resource Center</td>
<td>Princeton, NJ</td>
<td>$17,500</td>
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<tr>
<td>Population-Environment Balance</td>
<td>Washington, DC</td>
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<td>Prevent Child Abuse America</td>
<td>Chicago, IL</td>
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<tr>
<td>Prevent Child Abuse North Carolina, Inc.</td>
<td>Raleigh, NC</td>
<td>$15,000</td>
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<tr>
<td>Organization and Project Description</td>
<td>Amount Paid</td>
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<tr>
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<tr>
<td>ProEnglish, Arlington, VA&lt;br&gt;For Legal defense fund</td>
<td>$17,500</td>
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<td>Radio America, Washington, DC&lt;br&gt;Toward the establishment of the News Bureau-$15,000</td>
<td>$20,000</td>
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<tr>
<td>Rails-To-Trails Conservancy, Washington, DC&lt;br&gt;For Rail-trail projects-New Jersey Initiative</td>
<td>$27,500</td>
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<tr>
<td>Recording for the Blind &amp; Dyslexic, Inc., Princeton, NJ</td>
<td>$25,000</td>
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<tr>
<td>Re-creation, Inc., Port Trevorton, PA</td>
<td>$10,000</td>
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<tr>
<td>Residents' Committee to Protect the Adirondacks, Inc., North Creek, NY&lt;br&gt;For Adirondack Park Sustainable Forestry Project</td>
<td>$10,000</td>
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<tr>
<td>The Rockefeller University, New York, NY&lt;br&gt;For The purchase of a Multi-Photon Imaging System</td>
<td>$550,000</td>
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<tr>
<td>Roundabout Theatre Company, Inc., New York, NY</td>
<td>$30,000</td>
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<tr>
<td>Rutgers University Foundation/Network for Family Life Education, New Brunswick, NJ&lt;br&gt;For The Network for Family Life Education National Teen-to-Teen Sexuality Education Project</td>
<td>$10,000</td>
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<tr>
<td>Rutgers University Foundation/College of Nursing, Newark, NJ&lt;br&gt;Toward the construction of the new nursing facility in New Brunswick, $50,000 in 2002, like amount for like use in 2003</td>
<td>$50,000</td>
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<tr>
<td>The Salk Institute for Biological Studies, San Diego, CA&lt;br&gt;Toward Dr Jan Karlseder's research on gene regulation</td>
<td>$100,000</td>
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<tr>
<td>The Salvation Army/New Jersey Divisional Headquarters, Union, NJ&lt;br&gt;For Morristown Corps of which $12,500 is for emergency assistance</td>
<td>$35,000</td>
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<td>Organization</td>
<td>Project Description</td>
<td>Amount Paid</td>
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<td>--------------------------------------------------------</td>
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| The Sarah P. Duke Gardens                              | Durham, NC  
  *Toward the construction and upfitting of the garden
cottage food service courtyard comprising total support of Duke Gardens for 2002 and 2003* | $58,400     |
| Scheie Eye Institute                                   | Philadelphia, PA  
  *To purchase research equipment needed by the F.M Kirby Center scientists* | $500,000    |
| School of American Ballet, Inc.                        | New York, NY  
  *Toward the construction and upfitting of the garden
cottage food service courtyard comprising total support of Duke Gardens for 2002 and 2003* | $7,500      |
| The Seeing Eye, Inc.                                   | Morristown, NJ  
  *To purchase research equipment needed by the F.M Kirby Center scientists* | $45,000     |
| Sexuality Information and Education Council of the United States, Inc. | New York, NY  
  *Toward the preservation of stained-glass windows* | $25,000     |
| The Skin Cancer Foundation, Inc.                       | New York, NY  
  *Toward the preservation of stained-glass windows* | $25,000     |
| St. Hilda’s and St. Hugh’s School                      | New York, NY  
  *Toward the preservation of stained-glass windows* | $20,000     |
| St. Hubert’s Giralda                                   | Madison, NJ  
  *Toward the preservation of stained-glass windows* | $5,000      |
| St. Paul’s Episcopal Church                            | Brownville, NY  
  *Toward the preservation of stained-glass windows* | $3,500      |
| St. Peter’s Episcopal Church                           | Morristown, NJ  
  *Toward the preservation of stained-glass windows* | $75,000     |
| St. Philip’s Academy                                   | Newark, NJ  
  *Toward the preservation of stained-glass windows* | $40,000     |
| St. Stephen’s Episcopal Church                         | Wilkes-Barre, PA  
  *Toward the preservation of stained-glass windows* | $6,000      |
<table>
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<th>Organization</th>
<th>Amount Paid</th>
<th>Project Description</th>
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<tbody>
<tr>
<td>St. Stephen's Episcopal Church</td>
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<td>Wilkes-Barre, PA</td>
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<td>Stamford Hospital Health Foundation, Inc.</td>
<td>$27,500</td>
<td>Stamford, CT For Cancer Risk and Prevention Program</td>
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<td>State Theatre Center for the Arts, Inc.</td>
<td>$100,000</td>
<td>Easton, PA For The FM Kirby Endowment Fund-$25,000</td>
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<td>Stratford Volunteer Fire Company, Inc.</td>
<td>$2,500</td>
<td>Stratford, NY Toward the purchase of a demo saw and blades-$2,350</td>
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<td>The Student Conservation Association, Inc.</td>
<td>$5,000</td>
<td>Charlestown, NH Toward the SCA Adirondack Conservation Corps</td>
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<tr>
<td>Summit Speech School</td>
<td>$250,000</td>
<td>New Providence, NJ For FM Kirby Maintenance and Repair Endowment Fund-$250,000 in 2001 and $250,000 in 2002</td>
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<tr>
<td>Summit Speech School</td>
<td>$55,000</td>
<td>New Providence, NJ</td>
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<tr>
<td>Thomas Jefferson University</td>
<td>$100,000</td>
<td>Philadelphia, PA For Dr Schneider's continued research of Parkinson's disease</td>
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<td>Triangle Community Foundation</td>
<td>$37,500</td>
<td>Research Triangle Park, NC To match the Philanthropy Central challenge grant</td>
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<td>Triangle United Way, Inc.</td>
<td>$90,000</td>
<td>Research Triangle Park, NC For Orange County United Way-$40,000</td>
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<td>Trout Unlimited, Inc.</td>
<td>$27,500</td>
<td>Arlington, VA</td>
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<td>Trudeau Institute, Inc.</td>
<td>$70,000</td>
<td>Saranac Lake, NY Toward the purchase of a Becton Dickinson Immunocytometry systems FACSCalibur</td>
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<td>The Trust for Public Land</td>
<td>$50,000</td>
<td>Morristown, NJ For New Jersey Programs only</td>
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<td>U.S. English Foundation, Inc.</td>
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<td>United Cerebral Palsy Research &amp; Educational Foundation, Inc.</td>
<td>Washington, DC&lt;br&gt;For Thyroid deficiency and developmental brain damage research</td>
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<td>United Negro College Fund, Inc.</td>
<td>Fairfax, VA</td>
<td>$10,000</td>
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<td>United Network for Organ Sharing</td>
<td>Richmond, VA&lt;br&gt;Toward &quot;Build Your Own Tribute&quot; web site</td>
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<td>United Way of Morris County</td>
<td>Morristown, NJ&lt;br&gt;For Support of traditional member agencies</td>
<td>$325,000</td>
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<td>United Way of Wyoming Valley</td>
<td>Wilkes-Barre, PA&lt;br&gt;For Support of traditional member agencies</td>
<td>$70,000</td>
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<td>University of North Carolina at Chapel Hill</td>
<td>Chapel Hill, NC&lt;br&gt;For PlayMakers Repertory Company</td>
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<td>Visiting Health Service of Morris County</td>
<td>Cedar Knolls, NJ</td>
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<td>Visiting Nurse Association of Northern New Jersey, Inc.</td>
<td>Morristown, NJ&lt;br&gt;For Eldercare program</td>
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<td>Volunteers For Morris County, Inc.</td>
<td>Morristown, NJ</td>
<td>$15,000</td>
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<td>Volunteers of America, Inc./Greater New York</td>
<td>New York, NY&lt;br&gt;For Capital improvements at Respite II Crisis Shelter Home in Plainfield, NJ</td>
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<td>VZV Research Foundation, Inc.</td>
<td>New York, NY&lt;br&gt;For Research programs-$50,000, general operations-$25,000, like amounts and uses pledged in 2002</td>
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<tr>
<td>Wake Forest University</td>
<td>Winston-Salem, NC</td>
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<td>Washington Legal Foundation</td>
<td>Washington, DC</td>
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<td>Waterloo Foundation for the Arts, Inc.</td>
<td>Stanhope, NJ</td>
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<td>Weatherspoon Art Gallery</td>
<td>Greensboro, NC</td>
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<tr>
<td>Whitney Museum of American Art</td>
<td>New York, NY</td>
<td>$15,000</td>
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<td>The Wilderness Society</td>
<td>Washington, DC</td>
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<td>Wildlife Conservation Society</td>
<td>Bronx, NY</td>
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<td>Wilson College</td>
<td>Chambersburg, PA</td>
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<tr>
<td>Winterthur Museum, Garden &amp; Library</td>
<td>Winterthur, DE</td>
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<td>Wistar Institute of Anatomy and Biology</td>
<td>Philadelphia, PA</td>
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<td>Wyoming Seminary</td>
<td>Kingston, PA</td>
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<tr>
<td>Young America's Foundation</td>
<td>Herndon, VA</td>
<td>$75,000</td>
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<tr>
<td>Organization</td>
<td>Project Description</td>
<td>Grant Amount Paid</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
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| The Zachary and Elizabeth M. Fisher Center for Alzheimer's Research Foundation | New York, NY  
Toward the F M Kirby Fund for Research Initiatives in Alzheimer's and Parkinson's Disease | $500,000          |
| Zeta Psi Educational Foundation                  | Pearl River, NY  
For The Kirby Mid-Atlantic Regional Leadership Conference in 2003 | $17,500           |

| Grand Total                                      | $19,766,828                                                            |
|----------|---------------------------|-----------|-------------|--------|--------------|-------------|------------|
| 14,000   | 3M Company                | 145 15    | 1,612,111   | 123 30 | 1,726,200    | 0 5         | 2 0        |
| 8,700    | ACE Limited               | 31 44     | 273,563     | 29 34  | 255,258      | 0 1         | 2 2        |
| 17,300   | AFLAC Corporation         | 29 11     | 503,563     | 30 12  | 521,076      | 0 2         | 0 8        |
| 61,900   | AOL Time Warner Inc       | 15 23     | 942,526     | 13 10  | 810,890      | 0 2         | 0 0        |
| 25,200   | AT&T Wireless Services Inc| 7 96      | 200,717     | 5 65   | 142,380      | 0 0         | 0 0        |
| 10,700   | Abbott Laboratories       | 41 06     | 439,389     | 40 00  | 428,000      | 0 1         | 2 3        |
| 145,800  | Accenture Ltd             | 15 60     | 2,274,293   | 17 99  | 2,622,942    | 0 8         | 0 0        |
| 18,500   | Affiliated Computer Services| 48 93   | 905,224     | 52 65  | 974,025      | 0 3         | 0 0        |
| 32,050   | Air Products & Chemicals, Inc| 49 73    | 1,593,953   | 42 75  | 1,370,137    | 0 4         | 2 0        |
| 104,590  | Albertsons, Inc           | 23 87     | 2,496,984   | 22 26  | 2,328,173    | 0 7         | 3 4        |
| 23,700   | Alcon Inc                 | 37 73     | 894,225     | 39 45  | 934,965      | 0 3         | 0 7        |
| 90,900   | Altra Group Inc           | 41 96     | 3,814,617   | 40 53  | 3,684,177    | 1 1         | 6 3        |
| 29,000   | American Express Company  | 35 52     | 1,030,017   | 35 35  | 1,025,150    | 0 3         | 2 5        |
| 11,836   | American Int'l Group      | 64 33     | 761,459     | 57 85  | 684,712      | 0 2         | 0 3        |
| 78,000   | Amgen Inc                 | 45 82     | 3,573,897   | 48 34  | 3,770,520    | 1 1         | 0 0        |
| 32,800   | Anadarko Petroleum        | 50 05     | 1,641,550   | 47 90  | 1,571,120    | 0 5         | 0 6        |
|---------------------------------|-----------|--------------|-------|---------------|-------------|------------|
| Analog Devices, Inc             | 35 22     | 3,038,150 54 | 23 87 | 2,058,787 50  | 0 6         | 0 0        |
| Anheuser-Busch                  | 52 30     | 1,869,610 58 | 48 40 | 1,730,300 00  | 0 5         | 1 6        |
| Companies                       |           |              |       |               |             |            |
| Apollo Group Inc                | 43 37     | 897,691 50   | 44 00 | 910,800 00    | 0 3         | 0 0        |
| Applied Materials               | 22 43     | 3,415,704 09 | 13 03 | 1,984,469 00  | 0 6         | 0 0        |
| Archer-Daniels Midland Co       | 14 06     | 2,523,202 20 | 12 40 | 2,225,378 40  | 0 7         | 1 9        |
| AutoZone Inc                    | 81 36     | 1,631,204 90 | 70 65 | 1,416,532 50  | 0 4         | 0 0        |
| Automatic Data Processing, Inc  | 42 85     | 1,889,481 50 | 39 25 | 1,730,925 00  | 0 5         | 1 0        |
| Avaya Inc                       | 12 99     | 4,583,372 31 | 2 45  | 864,605 00    | 0 3         | 0 0        |
| Avon Products, Inc              | 49 97     | 1,504,191 27 | 53 87 | 1,621,487 00  | 0 5         | 1 5        |
| BJ Services Company             | 31 76     | 733,727 71   | 32 31 | 746,361 00    | 0 2         | 0 0        |
| Bank of America Corp            | 55 76     | 2,776,619 61 | 69 57 | 3,464,586 00  | 1 0         | 3 7        |
| Bea Systems                     | 11 69     | 918,050 69   | 11 47 | 900,395 00    | 0 3         | 0 0        |
| Bed Bath & Beyond               | 32 80     | 219,739 55   | 34 53 | 231,351 00    | 0 1         | 0 0        |
| BellSouth Corporation           | 27 95     | 2,627,636 63 | 25 87 | 2,431,780 00  | 0 7         | 3 1        |
| Berkshire Hathaway, Inc         | 73,192    | 146,384 68   | 72,750| 145,500 00    | 0 0         | 0 0        |
| Best Buy, Inc                   | 25 07     | 265,766 67   | 24 15 | 255,990 00    | 0 1         | 0 0        |
| Biogen                          | 34 40     | 92,889 18    | 40 06 | 108,162 00    | 0 0         | 0 0        |
| Boeing                          | 37 14     | 2,244,687 20 | 32 99 | 1,993,915 60  | 0 6         | 2 1        |
| Boston Scientific Corp          | 34 93     | 936,028 42   | 42 52 | 1,139,536 00  | 0 3         | 0 0        |
| Bristol-Myers Squibb            | 29 87     | 4,000,101 29 | 23 15 | 3,100,248 00  | 0 9         | 4 8        |
| CIT Group Inc                   | 23 00     | 4,462,000 00 | 19 60 | 3,802,400 00  | 1 1         | 2 4        |
| Cadence Design                  | 15 22     | 175,013 84   | 11 79 | 135,585 00    | 0 0         | 0 0        |
| Cardinal Health Inc             | 65 41     | 228,928 98   | 59 19 | 207,165 00    | 0 1         | 0 2        |
# PORTFOLIO APPRAISAL

**F.M. KIRBY FOUNDATION, INC.**

**CONSOLIDATED INVESTMENT PORTFOLIO**

*December 31, 2002*

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## PORTFOLIO APPRAISAL

**F.M. KIRBY FOUNDATION, INC.**

**CONSOLIDATED INVESTMENT PORTFOLIO**

*December 31, 2002*

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### F.M. KIRBY FOUNDATION, INC.
#### CONSOLIDATED INVESTMENT PORTFOLIO
##### December 31, 2002

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## PORTFOLIO APPRAISAL

**F.M. KIRBY FOUNDATION, INC.**

**CONSOLIDATED INVESTMENT PORTFOLIO**

*December 31, 2002*

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## PORTFOLIO APPRAISAL
### F.M. KIRBY FOUNDATION, INC.
### CONSOLIDATED INVESTMENT PORTFOLIO
### December 31, 2002

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F.M. KIRBY FOUNDATION, INC.
CONSOLIDATED INVESTMENT PORTFOLIO
December 31, 2002

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**F.M. KIRBY FOUNDATION, INC.**
**CONSOLIDATED INVESTMENT PORTFOLIO**
**December 31, 2002**

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# PORTFOLIO APPRAISAL

**F.M. KIRBY FOUNDATION, INC.**

**CONSOLIDATED INVESTMENT PORTFOLIO**

*December 31, 2002*

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| **Statement 8A** |
### PORTFOLIO APPRAISAL
#### F.M. KIRBY FOUNDATION, INC.
#### CONSOLIDATED INVESTMENT PORTFOLIO
#### December 31, 2002

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\[ \text{Total: } 4,657,676 94 \]
\[ \text{Market Value: } 4,570,594 64 \]
\[ \text{Yield: } 1 3 0 0 \]

| **JAPAN** |                            |           |             |       |                |             |            |
| 357,000  | Hitachi, LTD ORD           | 6 67      | 2,381,655 76| 3 83  | 1,368,795 34   | 0 4         | 0 0        |
| 290,000  | Matsushita Electric Industries ORD | 14 57 | 4,226,369 12| 9 86  | 2,859,188 35   | 0 8         | 0 0        |
| 976,000  | Mitsubishi Heavy Industries, LTD ORD | 4 05 | 3,949,021 88| 2 44  | 2,385,100 71   | 0 7         | 0 0        |
| 394      | Mitsubishi Tokyo Financial ORD | 10,184 77| 4,012,800 62| 5 43  | 2,141,484 04   | 0 6         | 0 0        |
| 538,000  | Nippon Mitsubishi Oil Co ORD | 3 37 | 1,811,535 84| 4 53  | 2,439,065 46   | 0 7         | 1 3        |
| 518      | Nippon Telegraph & Telephone Corp | 8,683 76| 4,498,189 10| 3 63  | 1,881,334 13   | 0 6         | 0 0        |
| 363      | Sumitomo Mitsui Financial Group ORD | 5,952 24| 2,160,661 49| 3 12  | 1,134,852 56   | 0 3         | 0 0        |

\[ \text{Total: } 23,040,233 80 \]
\[ \text{Market Value: } 14,209,820 59 \]
\[ \text{Yield: } 4 2 0 2 \]

| **SINGAPORE** |                            |           |             |       |                |             |            |
| 616,479    | Jardine Matheson Holdings ORD | 3 13 | 1,932,567 39| 6 25  | 3,852,994 15   | 1 1         | 0 0        |

\[ \text{Total: } 1,932,567 39 \]
\[ \text{Market Value: } 3,852,994 15 \]
\[ \text{Yield: } 1 1 0 0 \]
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December 31, 2002

CONSOLIDATED INVESTMENT PORTFOLIO
F.M. KIRBY FOUNDATION, INC.
PORTFOLIO APPRAISAL
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**TOTALS**

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F. M. KIRBY FOUNDATION, INC.

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FORM 990PF, PART II - OTHER INVESTMENTS

SEE STATEMENT 9A

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CEMTIL 09/2003 10:11:21 V02-5

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STATEMENT 5

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51-6017929

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24

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30,1222,000
# PORTFOLIO APPRAISAL
## CONSOLIDATED INVESTMENT PORTFOLIO
### December 31, 2002

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F.M. KIRBY FOUNDATION, INC.

F.M. KIRBY, PRESIDENT
F.M. KIRBY FOUNDATION, INC.
17 DEHART STREET, PO BOX 151
MORRISTOWN, NJ 07963-0151
(973) 538-4800
SOLICITATIONS MUST BE IN WRITING. SUGGESTED SOLICITATION GUIDELINES ARE AVAILABLE IN WRITING FROM THE FOUNDATION AND CAN BE FOUND ON THE INTERNET AT HTTP://FDNCENTER.ORG/GRANTMAKER/KIRBY. A VALID INTERNAL REVENUE SERVICE TAX-EXEMPTION LETTER MUST ACCOMPANY EACH SOLICITATION.
SUBMISSION DEADLINE IS OCTOBER 31ST OF EACH YEAR. SOLICITATIONS RECEIVED AFTER OCTOBER 31ST ARE HELD FOR CONSIDERATION THE FOLLOWING YEAR.
NO GRANTS ARE MADE TO INDIVIDUALS. SUCCESSFUL APPLICANTS TEND TO BE LIMITED TO ORGANIZATIONS ALREADY WELL KNOWN TO ONE OR MORE OF OUR DIRECTORS.
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Page 6 - Part VIII: Information about Officers, Directors, Trustees, and Foundation Managers, etc

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<tr>
<td>Thomas J. Bianchini</td>
<td>Secretary-Treasurer</td>
<td>35,194</td>
<td>4,223</td>
<td>0</td>
</tr>
<tr>
<td>17 DeHart Street</td>
<td></td>
<td></td>
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<tr>
<td>Morristown, NJ 07960</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Alice K. Horton</td>
<td>Assistant Secretary</td>
<td>0</td>
<td>0</td>
<td>316</td>
</tr>
<tr>
<td>4500 Schley Road</td>
<td></td>
<td></td>
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<tr>
<td>Hillsborough, NC 27278</td>
<td></td>
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<tr>
<td>Jefferson W. Kirby</td>
<td>Director</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>769 Shunpike Road</td>
<td></td>
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<tr>
<td>Green Village, NJ 07935</td>
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<td></td>
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</tbody>
</table>

TOTALS                              | $ 234,481       | $ 24,496     | $ 640                                  |
### Part I: Short-Term Capital Gains and Losses - Assets Held One Year or Less

<table>
<thead>
<tr>
<th>(a) Description of property</th>
<th>(b) Date acquired</th>
<th>(c) Date sold</th>
<th>(d) Sales price</th>
<th>(e) Cost or other basis</th>
<th>(f) Gain or (Loss)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Example: 100 shares 7% preferred of &quot;Z&quot; Co.)</td>
<td>(mo., day, yr)</td>
<td>(mo., day, yr)</td>
<td></td>
<td>(see page 31)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
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<tr>
<td>5</td>
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</tr>
</tbody>
</table>

2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts
4 Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2001 Capital Loss Carryover Worksheet
5 Net short-term gain or (loss) Combine lines 1 through 4 in column (f) Enter here and on line 14 below

### Part II: Long-Term Capital Gains and Losses - Assets Held More Than One Year

<table>
<thead>
<tr>
<th>(a) Description of property</th>
<th>(b) Date acquired</th>
<th>(c) Date sold</th>
<th>(d) Sales price</th>
<th>(e) Cost or other basis</th>
<th>(f) Gain or (Loss)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Example: 100 shares 7% preferred of &quot;Z&quot; Co.)</td>
<td>(mo., day, yr)</td>
<td>(mo., day, yr)</td>
<td></td>
<td>(see page 31)</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 SEE STATEMENT 1</td>
<td>390,798,571</td>
<td>420,375,593</td>
<td>-29,577,022</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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<td>10</td>
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<td>11</td>
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<td></td>
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<tr>
<td>12</td>
<td></td>
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<td></td>
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<td></td>
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<tr>
<td>13</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts
9 Capital gain distributions
10 Gain from Form 4797, Part I
11 Long-term capital loss carryover Enter in both columns (f) and (g) the amount, if any, from line 14, of the 2001 Capital Loss Carryover Worksheet
12 Combine lines 6 through 11 in column (g)
13 Net long-term gain or (loss) Combine lines 6 through 11 in column (f) Enter here and on line 15 below

*28% rate gain or loss includes all "collectibles gains and losses" (as defined on page 31 of the instructions) and up to 50% of the eligible gain on qualified small business stock (see page 30 of the instructions)

### Part III: Summary of Parts I and II

<table>
<thead>
<tr>
<th>(1) Beneficiaries’ (see page 32)</th>
<th>(2) Estate’s or trust’s</th>
<th>(3) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>14 Net short-term gain or (loss) (from line 5 above)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15 Net long-term gain or (loss)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a Total for year (from line 13 above)</td>
<td>15a</td>
<td>-29,577,022</td>
</tr>
<tr>
<td>b 28% rate gain or (loss) (from line 12 above)</td>
<td>15b</td>
<td></td>
</tr>
<tr>
<td>c Qualified 5-year gain</td>
<td>15c</td>
<td></td>
</tr>
<tr>
<td>d Unrecaptured section 1250 gain (see line 17 of the worksheet on page 33)</td>
<td>15d</td>
<td></td>
</tr>
<tr>
<td>16 Total net gain or (loss) Combine lines 14 and 15a</td>
<td>16</td>
<td>-29,577,022</td>
</tr>
</tbody>
</table>

Note: If line 16 column (3), is a net gain, enter the gain on Form 1041, line 4. If lines 15a and 16, column (2) are net gains, go to Part V, and do not complete Part IV. If line 16 column (3) is a net loss, complete Part IV and the Capital Loss Carryover Worksheet, as necessary.
### Part IV Capital Loss Limitation

17 Enter here and enter as a (loss) on Form 1041, line 4, the smaller of:
   a. The loss on line 16, column (3) or
   b. $3,000

If the loss on line 16, column (3), is more than $3,000, or if Form 1041, page 1, line 22, is a loss, complete the Capital Loss Carryover Worksheet on page 34 of the instructions to determine your capital loss carryover.

### Part V Tax Computation Using Maximum Capital Gains Rates

(Complete this part only if both lines 15a and 16 in column (2) are gains, and Form 1041, line 22 is more than zero)

**Note**: If line 15b, column (2) or line 15d, column (2) is more than zero, complete the worksheet on page 35 of the instructions to figure the amount to enter on lines 20 and 38 below and skip all other lines below. Otherwise, go to line 18.

<table>
<thead>
<tr>
<th>18</th>
<th>Enter taxable income from Form 1041, line 22</th>
</tr>
</thead>
<tbody>
<tr>
<td>19</td>
<td>Enter the smaller of line 15a or 16 in column (2)</td>
</tr>
<tr>
<td>20</td>
<td>If the estate or trust is filing Form 4952, enter the amount from line 4e, otherwise, enter -0-</td>
</tr>
<tr>
<td>21</td>
<td>Subtract line 20 from line 19 If zero or less, enter -0-</td>
</tr>
<tr>
<td>22</td>
<td>Subtract line 21 from line 18 If zero or less, enter -0-</td>
</tr>
<tr>
<td>23</td>
<td>Figure the tax on the amount on line 22 Use the 2002 Tax Rate Schedule on page 21 of the instructions</td>
</tr>
<tr>
<td>24</td>
<td>Enter the smaller of the amount on line 18 or $1,850</td>
</tr>
</tbody>
</table>

If line 24 is greater than line 22, go to line 25. Otherwise, skip lines 25 through 31 and go to line 32.

| 25 | Enter the amount from line 22 |
| 26 | Subtract line 25 from line 24 If zero or less, enter -0- and go to line 32 |
| 27 | Enter the estate's or trust's allocable portion of qualified 5-year gain, if any, from line 15c, column (2) |
| 28 | Enter the smaller of line 26 or line 27 |
| 29 | Multiply line 28 by 8% (0.08) |
| 30 | Subtract line 28 from line 26 |
| 31 | Multiply line 30 by 10% (0.10) |

If the amounts on lines 21 and 26 are the same, skip lines 32 through 35 and go to line 36.

| 32 | Enter the smaller of line 18 or line 21 |
| 33 | Enter the amount, if any, from line 26 |
| 34 | Subtract line 33 from line 32 |
| 35 | Multiply line 34 by 20% (0.20) |

| 36 | Add lines 23, 29, 31, and 35 |
| 37 | Figure the tax on the amount on line 18 Use the 2002 Tax Rate Schedule on page 21 of the instructions |
| 38 | Tax on all taxable income (including capital gains) Enter the smaller of line 36 or line 37 here and on line 1a of Schedule G, Form 1041 |

---

CED11L F505 05/09/2003 10 11 21 V02-5 301222 000
### F.M. KIRBY FOUNDATION, INC.

**SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES**

**REALIZED GAINS AND LOSSES**

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY**

**BRANDES INVESTMENT PARTNERS**

**From 01-01-02 Through 12-31-02**

<table>
<thead>
<tr>
<th>Date</th>
<th>Quantity</th>
<th>Security</th>
<th>Cost Basis</th>
<th>Proceeds</th>
<th>Gain Or Loss</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-08-02</td>
<td>47,500</td>
<td>Conagra Foods Inc</td>
<td>794,742.04</td>
<td>1,161,371.79</td>
<td>366,629.75</td>
</tr>
<tr>
<td>01-23-02</td>
<td>40,400</td>
<td>Waste Management, Inc</td>
<td>883,915.32</td>
<td>1,210,365.82</td>
<td>326,450.50</td>
</tr>
<tr>
<td>01-28-02</td>
<td>248,800</td>
<td>Diageo ORD</td>
<td>2,064,627.17</td>
<td>2,767,565.78</td>
<td>702,938.61</td>
</tr>
<tr>
<td>01-28-02</td>
<td></td>
<td>Pound Sterling (GBP)</td>
<td>2,767,565.78</td>
<td>2,797,131.41</td>
<td>29,565.63</td>
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<tr>
<td>01-29-02</td>
<td>105,200</td>
<td>Diageo ORD</td>
<td>872,985.44</td>
<td>1,180,670.81</td>
<td>307,685.37</td>
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<tr>
<td>01-29-02</td>
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<td>Pound Sterling (GBP)</td>
<td>1,180,670.81</td>
<td>1,190,052.84</td>
<td>9,382.03</td>
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<td>02-04-02</td>
<td>12,635</td>
<td>Northrop Grumman Corp</td>
<td>1,118,197.50</td>
<td>1,394,732.71</td>
<td>276,535.21</td>
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<tr>
<td>02-06-02</td>
<td>455,300</td>
<td>Unilever PLC ORD</td>
<td>2,986,743.98</td>
<td>3,695,998.32</td>
<td>709,254.34</td>
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<td>02-06-02</td>
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<td>Pound Sterling (GBP)</td>
<td>3,695,998.32</td>
<td>3,704,285.24</td>
<td>8,286.92</td>
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<td>02-06-02</td>
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<td>Hong Kong Dollars (HKD)</td>
<td>1,885,327.00</td>
<td>1,885,315.56</td>
<td>-1,44</td>
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<td>02-06-02</td>
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<td>European Currency (EMU)</td>
<td>2,095,315.71</td>
<td>2,091,539.11</td>
<td>-3,766.60</td>
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<tr>
<td>02-22-02</td>
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<td>Swiss Francs (CHF)</td>
<td>501,053.19</td>
<td>500,285.52</td>
<td>-767.67</td>
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<td>02-25-02</td>
<td>196,544</td>
<td>Tyson Foods, Inc Class A</td>
<td>1,522,865.18</td>
<td>2,536,440.77</td>
<td>1,013,575.59</td>
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<tr>
<td>03-05-02</td>
<td>95,688</td>
<td>Diageo ORD</td>
<td>794,051.63</td>
<td>1,140,760.09</td>
<td>346,708.47</td>
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<tr>
<td>03-05-02</td>
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<td>Pound Sterling (GBP)</td>
<td>1,140,760.09</td>
<td>1,137,083.08</td>
<td>-3,677.01</td>
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<td>03-05-02</td>
<td>255,212</td>
<td>Diageo ORD</td>
<td>2,117,836.13</td>
<td>3,018,175.56</td>
<td>900,339.43</td>
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<td>03-05-02</td>
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<td>Pound Sterling (GBP)</td>
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<td>Pound Sterling (GBP)</td>
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<tr>
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<td>European Currency (EMU)</td>
<td>569,826.10</td>
<td>565,584.88</td>
<td>-4,241.22</td>
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<td>03-12-02</td>
<td>44,193</td>
<td>Raytheon Company</td>
<td>1,507,137.04</td>
<td>1,715,131.08</td>
<td>207,994.04</td>
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<td>03-13-02</td>
<td>62,007</td>
<td>Raytheon Company</td>
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<td>2,409,090.78</td>
<td>294,433.57</td>
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<td>Marks &amp; Spencer PLC ORD</td>
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<td>563,350.19</td>
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<tr>
<td>04-02-02</td>
<td>1</td>
<td>Telefonica de Espana SA (ADR)</td>
<td>25.79</td>
<td>18.43</td>
<td>-7.36</td>
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<tr>
<td>04-03-02</td>
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<td>European Currency (EMU)</td>
<td>2,046,003.99</td>
<td>2,063,617.02</td>
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<td>Bank One Corp</td>
<td>1,496,920.21</td>
<td>2,358,357.40</td>
<td>861,437.19</td>
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<td>05-01-02</td>
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<td>Pound Sterling (GBP)</td>
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<td>575,452.50</td>
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<td>Altrna Group Inc</td>
<td>1,004,818.59</td>
<td>1,352,514.19</td>
<td>347,695.60</td>
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<td>45,879</td>
<td>British American Tobacco PLC ORD</td>
<td>350,257.64</td>
<td>505,883.35</td>
<td>155,574.71</td>
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<td>Pound Sterling (GBP)</td>
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<td>05-14-02</td>
<td>26,256</td>
<td>Bank One Corp</td>
<td>690,971.28</td>
<td>1,092,983.34</td>
<td>402,012.06</td>
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<td>05-15-02</td>
<td>10,463</td>
<td>Bank One Corp</td>
<td>275,351.63</td>
<td>436,788.83</td>
<td>161,437.20</td>
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<td>European Currency (EMU)</td>
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<td>535,758.87</td>
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<td>05-16-02</td>
<td>76,521</td>
<td>British American Tobacco PLC ORD</td>
<td>584,190.26</td>
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<td>358.19</td>
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<td>167,800</td>
<td>Unilever PLC ORD</td>
<td>1,100,759.15</td>
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<td>463,445.17</td>
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<td>05-17-02</td>
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<td>Pound Sterling (GBP)</td>
<td>1,564,204.32</td>
<td>1,555,729.77</td>
<td>-8,474.55</td>
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</table>
### REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY BRANDES INVESTMENT PARTNERS**

**From 01-01-02 Through 12-31-02**

<table>
<thead>
<tr>
<th>Date</th>
<th>Quantity</th>
<th>Security</th>
<th>Cost Basis</th>
<th>Proceeds</th>
<th>Gain Or Loss</th>
</tr>
</thead>
<tbody>
<tr>
<td>05-21-02</td>
<td>27,807</td>
<td>Conagra Foods Inc</td>
<td>465,250 36</td>
<td>680,163 74</td>
<td>214,913 38</td>
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<tr>
<td>05-22-02</td>
<td>92,803</td>
<td>Conagra Foods Inc</td>
<td>1,552,725 18</td>
<td>2,778,755 36</td>
<td>726,030 18</td>
</tr>
<tr>
<td>05-22-02</td>
<td>1</td>
<td>Telefonica de Espana SA (ADR)</td>
<td>34 04</td>
<td>21 22</td>
<td>-12 82</td>
</tr>
<tr>
<td>05-22-02</td>
<td></td>
<td>European Currency (EMU)</td>
<td>486,408 33</td>
<td>486,278 08</td>
<td>-130 25@</td>
</tr>
<tr>
<td>05-22-02</td>
<td>1,465</td>
<td>Lubrizol Corp</td>
<td>45,424 44</td>
<td>51,581 82</td>
<td>6,153 38</td>
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<tr>
<td>06-02-02</td>
<td>17,528</td>
<td>ENI Spa ORD</td>
<td>210,189 53</td>
<td>278,924 65</td>
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</tr>
<tr>
<td>06-02-02</td>
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<td>European Currency (EMU)</td>
<td>278,924 65</td>
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<tr>
<td>06-02-02</td>
<td>8,740</td>
<td>Allstate Corporation</td>
<td>301,597 55</td>
<td>324,585 94</td>
<td>22,988 39</td>
</tr>
<tr>
<td>06-02-02</td>
<td>20,200</td>
<td>Boeing Co</td>
<td>750,209 82</td>
<td>906,292 15</td>
<td>156,082 33</td>
</tr>
<tr>
<td>06-02-02</td>
<td>39,900</td>
<td>Du Pont (E I ) de Nemours &amp; Co</td>
<td>1,708,145 48</td>
<td>1,775,177 31</td>
<td>67,031 83</td>
</tr>
<tr>
<td>06-02-02</td>
<td>96,630</td>
<td>Prudential Financial Inc</td>
<td>2,873,790 84</td>
<td>3,221,904 63</td>
<td>348,113 79</td>
</tr>
<tr>
<td>06-02-02</td>
<td>20,000</td>
<td>Waste Management, Inc</td>
<td>437,581 84</td>
<td>529,042 05</td>
<td>91,460 21</td>
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<td>Unilever PLC ORD</td>
<td>418,620 15</td>
<td>600,495 42</td>
<td>180,875 27</td>
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<td>63,967</td>
<td>Unilever PLC ORD</td>
<td>418,620 15</td>
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<td>180,875 27</td>
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<td>-1,389 12@</td>
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**F. M. KIRBY FOUNDATION, INC. FEIN 51-6017929**

**SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES**
# SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

## REALIZED GAINS AND LOSSES
F. M. KIRBY FOUNDATION, INC.
PORTION OF THE ACCOUNT MANAGED BY BRANDES INVESTMENT PARTNERS
From 01-01-02 Through 12-31-02

<table>
<thead>
<tr>
<th>Date</th>
<th>Quantity</th>
<th>Security</th>
<th>Cost Basis</th>
<th>Proceeds</th>
<th>Gain Or Loss</th>
</tr>
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<tbody>
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<td>10-18-02</td>
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<td>Zurich Financial Services, AG (Rights)</td>
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<td>47 03</td>
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<td>276,253</td>
<td>307,275</td>
<td>31,022 26</td>
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</table>

**TOTAL GAINS**  
13,314,158 29

**TOTAL LOSSES**  
-3,708,089 73

An '@' denotes a currency transaction.
### Realized Gains and Losses

#### F. M. Kirby Foundation, Inc.

**Portion of the Account Managed by Waddell & Reed Asset Management Group**

From 01-01-02 Through 12-31-02

<table>
<thead>
<tr>
<th>Date</th>
<th>Quantity</th>
<th>Security</th>
<th>Cost Basis</th>
<th>Proceeds</th>
<th>Gain Or Loss</th>
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<tbody>
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## F. M. KIRBY FOUNDATION, INC.

### SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

**REALIZED GAINS AND LOSSES**

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY**

**WADDELL & REED ASSET MANAGEMENT GROUP**

**From 01-01-02 Through 12-31-02**

<table>
<thead>
<tr>
<th>Date</th>
<th>Quantity</th>
<th>Security</th>
<th>Cost Basis</th>
<th>Proceeds</th>
<th>Gain Or Loss</th>
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<td>930,832 06</td>
<td>-79,191 29</td>
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### F.M. KIRBY FOUNDATION, INC.

**SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES**

**REALIZED GAINS AND LOSSES**

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY**

**WADDELL & REED ASSET MANAGEMENT GROUP**

**From 01-01-02 Through 12-31-02**

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**TOTAL GAINS**  
1,346,156.22

**TOTAL LOSSES**  
-16,634,704.84

**TOTAL LOSSES**  
73,795,961.35  
58,507,412.73  
-15,288,548.62
## SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

### REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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### Realized Gains and Losses

**F. M. Kirby Foundation, Inc.**

**Portion of the Account Managed by MFS Institutional Advisors, Inc.**

*From 01-01-02 Through 12-31-02*

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### REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

*From 01-01-02 Through 12-31-02*

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## SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

### REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

*From 01-01-02 Through 12-31-02*

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# F.M. Kirby Foundation, Inc.

**Scheduled Detail of Long-Term Capital Gains and Losses**

**F. M. Kirby Foundation, Inc.**

**Portion of the Account Managed by MFS Institutional Advisors, Inc.**

*From 01-01-02 Through 12-31-02*

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### Schedule D: Detail of Long-Term Capital Gains and Losses

#### Realized Gains and Losses

**F. M. Kirby Foundation, Inc.**

**Portion of the Account Managed by MFS Institutional Advisors, Inc.**

*From 01-01-02 Through 12-31-02*

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## F. M. Kirby Foundation, Inc.

### Schedule D Detail of Long-Term Capital Gains and Losses

**Realized Gains and Losses**

F. M. Kirby Foundation, Inc.

Portion of the Account Managed by

MFS Institutional Advisors, Inc.

From 01-01-02 Through 12-31-02

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### Realized Gains and Losses

**F. M. Kirby Foundation, Inc.**

**Portion of the Account Managed by MFS Institutional Advisors, Inc.**

**From 01-01-02 Through 12-31-02**

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## F.M. KIRBY FOUNDATION, INC.

### SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

#### REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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**REALIZED GAINS AND LOSSES**

**F. M. KIRBY FOUNDATION, INC. PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

*From 01-01-02 Through 12-31-02*

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REALIZED GAINS AND LOSSES
F. M. KIRBY FOUNDATION, INC.
PORTION OF THE ACCOUNT MANAGED BY
MFS INSTITUTIONAL ADVISORS, INC.
From 01-01-02 Through 12-31-02

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### F. M. Kirby Foundation, Inc.

#### Schedule D: Detail of Long-Term Capital Gains and Losses

**Realized Gains and Losses**

*F. M. Kirby Foundation, Inc.*

**Portion of the Account Managed by MFS Institutional Advisors, Inc.*

*From 01-01-02 Through 12-31-02*

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# SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

## REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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## Schedule D: Detail of Long-Term Capital Gains and Losses

**F. M. Kirby Foundation, Inc.**

**Portion of the Account Managed by MFS Institutional Advisors, Inc.**

**From 01-01-02 Through 12-31-02**

### Realized Gains and Losses

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# Schedule D: Detail of Long-Term Capital Gains and Losses

**F. M. Kirby Foundation, Inc.**  
Porportion of the Account Managed by **MFS Institutional Advisors, Inc.**  
From 01-01-02 Through 12-31-02

## Realized Gains and Losses

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From 01-01-02 Through 12-31-02

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# Realized Gains and Losses

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Portion of the Account Managed by MFS Institutional Advisors, Inc.

**From 01-01-02 Through 12-31-02**

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### F.M. KIRBY FOUNDATION, INC.

**SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES**

**REALIZED GAINS AND LOSSES**

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY**

**MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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## SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

**REALIZED GAINS AND LOSSES**

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

*From 01-01-02 Through 12-31-02*

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# F.M. KIRBY FOUNDATION, INC.

**SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES**

**REALIZED GAINS AND LOSSES**

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

*From 01-01-02 Through 12-31-02*

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## SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

### REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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<th>Date</th>
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### F.M. KIRBY FOUNDATION, INC.

**SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES**

**REALIZED GAINS AND LOSSES**

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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<th>Quantity</th>
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## SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

### REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

*From 01-01-02 Through 12-31-02*

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# Schedule D: Detail of Long-Term Capital Gains and Losses

**F. M. Kirby Foundation, Inc.**  
**PORTION OF THE ACCOUNT MANAGED BY**  
**MFS INSTITUTIONAL ADVISORS, INC.**  
**From 01-01-02 Through 12-31-02**

## Realized Gains and Losses

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### F. M. KIRBY FOUNDATION, INC.

**SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES**

**REALIZED GAINS AND LOSSES**

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY**

**MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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# Realized Gains and Losses

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*Portion of the Account Managed by MFS Institutional Advisors, Inc.*

*From 01-01-02 Through 12-31-02*

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## F. M. KIRBY FOUNDATION, INC.
### SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

#### REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**
**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**
**From 01-01-02 Through 12-31-02**

<table>
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<tr>
<th>Date</th>
<th>Quantity</th>
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### SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

**REALIZED GAINS AND LOSSES**

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY**

**MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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### REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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## REALIZED GAINS AND LOSSES

### F. M. KIRBY FOUNDATION, INC.

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

*From 01-01-02 Through 12-31-02*

<table>
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<tr>
<th>Date</th>
<th>Quantity</th>
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<th>Cost Basis</th>
<th>Proceeds</th>
<th>Gain Or Loss</th>
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### Realized Gains and Losses

**F. M. Kirby Foundation, Inc.**

**Portion of the Account Managed By**

**MFS Institutional Advisors, Inc.**

**From 01-01-02 Through 12-31-02**

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F.M. KIRBY FOUNDATION, INC.

SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

REALIZED GAINS AND LOSSES
F. M. KIRBY FOUNDATION, INC.
PORTION OF THE ACCOUNT MANAGED BY
MFS INSTITUTIONAL ADVISORS, INC.
From 01-01-02 Through 12-31-02

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<th>Date</th>
<th>Quantity</th>
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<th>Cost Basis</th>
<th>Proceeds</th>
<th>Gain Or Loss</th>
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## F. M. KIRBY FOUNDATION, INC.

**SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES**

### REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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## F. M. Kirby Foundation, Inc.

### Schedule D Detail of Long-Term Capital Gains and Losses

#### Realized Gains and Losses

**F. M. Kirby Foundation, Inc.**

**Portion of the Account Managed by MFS Institutional Advisors, Inc.**

*From 01-01-02 Through 12-31-02*

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F. M. KIRBY FOUNDATION, INC.
SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

REALIZED GAINS AND LOSSES
F. M. KIRBY FOUNDATION, INC.
PORTION OF THE ACCOUNT MANAGED BY
MFS INSTITUTIONAL ADVISORS, INC.
From 01-01-02 Through 12-31-02

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### Realized Gains and Losses

**F. M. Kirby Foundation, Inc.**

**Portion of the Account Managed by MFS Institutional Advisors, Inc.**

**From 01-01-02 Through 12-31-02**

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### F.M. KIRBY FOUNDATION, INC.

#### SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

**REALIZED GAINS AND LOSSES**

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY**

**MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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## REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

*From 01-01-02 Through 12-31-02*

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## SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

### REALIZED GAINS AND LOSSES

**F. M. Kirby Foundation, Inc.**

**Portion of the Account Managed By MFS Institutional Advisors, Inc.**

*From 01-01-02 Through 12-31-02*

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# Realized Gains and Losses

**F. M. Kirby Foundation, Inc.**

Portion of the account managed by MFS Institutional Advisors, Inc.

From 01-01-02 Through 12-31-02

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### F.M. KIRBY FOUNDATION, INC.

**SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES**

**REALIZED GAINS AND LOSSES**

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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PORTION OF THE ACCOUNT MANAGED BY
MFS INSTITUTIONAL ADVISORS, INC.
From 01-01-02 Through 12-31-02

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### REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY**

**MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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### Realized Gains and Losses

**F. M. Kirby Foundation, Inc.**

Portion of the account managed by MFS Institutional Advisors, Inc.

From 01-01-02 Through 12-31-02

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REALIZED GAINS AND LOSSES
F. M. KIRBY FOUNDATION, INC.
PORTION OF THE ACCOUNT MANAGED BY
MFS INSTITUTIONAL ADVISORS, INC.
From 01-01-02 Through 12-31-02

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<th>Date</th>
<th>Quantity</th>
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<th>Cost Basis</th>
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<th>Gain Or Loss</th>
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REALIZED GAINS AND LOSSES
F. M. KIRBY FOUNDATION, INC.
PORTION OF THE ACCOUNT MANAGED BY
MFS INSTITUTIONAL ADVISORS, INC.
From 01-01-02 Through 12-31-02

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<th>Date</th>
<th>Quantity</th>
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<th>Proceeds</th>
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# Realized Gains and Losses

**F. M. Kirby Foundation, Inc.**

**Portion of the Account Managed by MFS Institutional Advisors, Inc.**

From 01-01-02 Through 12-31-02

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F. M. KIRBY FOUNDATION, INC.

SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

REALIZED GAINS AND LOSSES
F. M. KIRBY FOUNDATION, INC.
PORTION OF THE ACCOUNT MANAGED BY
MFS INSTITUTIONAL ADVISORS, INC.
From 01-01-02 Through 12-31-02

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### F.M. KIRBY FOUNDATION, INC.
#### SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

#### REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

*From 01-01-02 Through 12-31-02*

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## Schedule D: Detail of Long-Term Capital Gains and Losses

**F. M. Kirby Foundation, Inc.**

**Portion of the Account Managed by MFS Institutional Advisors, Inc.**

*From 01-01-02 Through 12-31-02*

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# Scheduled Detail of Long-Term Capital Gains and Losses

## Realized Gains and Losses

**F. M. Kirby Foundation, Inc.**

**Portion of the Account Managed by MFS Institutional Advisors, Inc.**

From 01-01-02 Through 12-31-02

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<th>Date</th>
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### F.M. Kirby Foundation, Inc.

**SCHEDULE D: DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES**

**REALIZED GAINS AND LOSSES**

**F.M. Kirby Foundation, Inc.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

*From 01-01-02 Through 12-31-02*

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### REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**
**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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### Schedule D: Detail of Long-Term Capital Gains and Losses

**F. M. Kirby Foundation, Inc.**

**Portion of the Account Managed by MFS Institutional Advisors, Inc.**

*From 01-01-02 Through 12-31-02*

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## REALIZED GAINS AND LOSSES

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PORTION OF THE ACCOUNT MANAGED BY  
MFS INSTITUTIONAL ADVISORS, INC.  
From 01-01-02 Through 12-31-02

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## F.M. KIRBY FOUNDATION, INC.

**SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES**

**REALIZED GAINS AND LOSSES**

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

*From 01-01-02 Through 12-31-02*

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## Realized Gains and Losses

**F. M. Kirby Foundation, Inc.**

**Portion of the account managed by MFS Institutional Advisors, Inc.**

*From 01-01-02 Through 12-31-02*

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### Realized Gains and Losses

#### F. M. Kirby Foundation, Inc.

**Portion of the Account Managed by MFS Institutional Advisors, Inc.**

*From 01-01-02 Through 12-31-02*

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# SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

## REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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REALIZED GAINS AND LOSSES
F. M. KIRBY FOUNDATION, INC.
PORTION OF THE ACCOUNT MANAGED BY
MFS INSTITUTIONAL ADVISORS, INC.
From 01-01-02 Through 12-31-02

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SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES
## SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

**REALIZED GAINS AND LOSSES**

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

From 01-01-02 Through 12-31-02

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### REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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## F.M. KIRBY FOUNDATION, INC.

**SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES**

**REALIZED GAINS AND LOSSES**

F. M. KIRBY FOUNDATION, INC.

PORTION OF THE ACCOUNT MANAGED BY

MFS INSTITUTIONAL ADVISORS, INC.

*From 01-01-02 Through 12-31-02*

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### Realized Gains and Losses

**F. M. Kirby Foundation, Inc.**

Portion of the account managed by

**MFS Institutional Advisors, Inc.**

From 01-01-02 Through 12-31-02

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### F.M. Kirby Foundation, Inc.

**Schedule D: Detail of Long-Term Capital Gains and Losses**

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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**84**
### F.M. Kirby Foundation, Inc.

**SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES**

**REALIZED GAINS AND LOSSES**

F. M. Kirby Foundation, Inc.

PORTION OF THE ACCOUNT MANAGED BY

**MFS Institutional Advisors, Inc.**

From 01-01-02 Through 12-31-02

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### F. M. Kirby Foundation, Inc.

**Portion of the Account Managed by MFS Institutional Advisors, Inc.**

**From 01-01-02 Through 12-31-02**

#### Realized Gains and Losses

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### Realized Gains and Losses

**F. M. Kirby Foundation, Inc.**

**Portion of the Account Managed by**

**MFS Institutional Advisors, Inc.**

**From 01-01-02 Through 12-31-02**

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### SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

**REALIZED GAINS AND LOSSES**

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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### SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

#### REALIZED GAINS AND LOSSES

**F. M. Kirby Foundation, Inc.**

**PORTION OF THE ACCOUNT MANAGED BY**

**MFS INSTITUTIONAL ADVISORS, INC.**

**From 01-01-02 Through 12-31-02**

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### SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES

#### REALIZED GAINS AND LOSSES

**F. M. KIRBY FOUNDATION, INC.**

**PORTION OF THE ACCOUNT MANAGED BY MFS INSTITUTIONAL ADVISORS, INC.**

*From 01-01-02 Through 12-31-02*

<table>
<thead>
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<th>Quantity</th>
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<th>Cost</th>
<th>Basis</th>
<th>Proceeds</th>
<th>Gain Or Loss</th>
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## F.M. Kirby Foundation, Inc. FEIN 51-6017929

**SCHEDULE D DETAIL OF LONG-TERM CAPITAL GAINS AND LOSSES**

### Realized Gains and Losses

**F. M. Kirby Foundation, Inc.**

**Portion of the Account Managed by**

**MFS Institutional Advisors, Inc.**

**From 01-01-02 Through 12-31-02**

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**Total Gains**  6,712,123 21

**Total Losses** -30,606,665 59

-23,894,542 38
### Depreciation and Amortization

#### General Depreciation

**Part I**  
**Election To Expense Certain Tangible Property Under Section 179**

**Note:** If you have any listed property, complete Part V before you complete Part I

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#### Section B - Assets Placed in Service During 2002 Tax Year Using the General Depreciation System

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<th>(b) Month and year placed in service</th>
<th>(c) Basis for depreciation (business/investment use only)</th>
<th>(d) Recovery period</th>
<th>(e) Convention</th>
<th>(f) Method</th>
<th>(g) Depreciation deduction</th>
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<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d 10-year property</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e 15-year property</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f 20-year property</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>g 25-year property</td>
<td>25 yrs</td>
<td>S/L</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>h Residential rental property</td>
<td>27.5 yrs</td>
<td>M M</td>
<td>S/L</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>i Nonresidential real property</td>
<td>39 yrs</td>
<td>M M</td>
<td>S/L</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Section C - Assets Placed in Service During 2002 Tax Year Using the Alternative Depreciation System

<p>| | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>a Class life</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b 12-year</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c 40-year</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Part IV  Summary (see page 6 of the instructions)

<p>| | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>21 Listed property</td>
<td>Enter amount from line 28</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>22 Total</td>
<td>Add amounts from line 12 through 17</td>
<td>11,124</td>
<td></td>
<td></td>
</tr>
<tr>
<td>23 For assets shown above and placed in service during the current year,</td>
<td>Enter the portion of the basis attributable to section 263A costs</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Part V - Listed Property (Include automobiles, certain other vehicles, cellular telephones, certain computers, and property used for entertainment, recreation, or amusement)**

*Note: For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.*

### Section A - Depreciation and Other Information

24a. Do you have evidence to support the business/investment use claimed? [ ] Yes [ ] No

<table>
<thead>
<tr>
<th>(a) Type of property (list vehicles first)</th>
<th>(b) Date placed in service</th>
<th>(c) Business/investment use percentage</th>
<th>(d) Cost or other basis</th>
<th>(e) Basis for depreciation (business/investment use only)</th>
<th>(f) Recovery period</th>
<th>(g) Method/Convention</th>
<th>(h) Depreciation deduction</th>
<th>(i) Elected section 179 cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use (see page 7 of the instructions)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>26 Property used more than 50% in a qualified business use (see page 7 of the instructions)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>27 Property used 50% or less in a qualified business use (see page 7 of the instructions)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>28 Add amounts in column (h), lines 25 through 27 Enter here and on line 21, page 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>29 Add amounts in column (l), line 26 Enter here and on line 7, page 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Section B - Information on Use of Vehicles

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person

If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

<table>
<thead>
<tr>
<th>(a) Vehicle 1</th>
<th>(b) Vehicle 2</th>
<th>(c) Vehicle 3</th>
<th>(d) Vehicle 4</th>
<th>(e) Vehicle 5</th>
<th>(f) Vehicle 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>30 Total business/investment miles driven during the year (do not include commuting miles - see page 2 of the instructions)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>31 Total commuting miles driven during the year</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>32 Total other personal (noncommuting) miles driven</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>33 Total miles driven during the year Add lines 30 through 32</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>34 Was the vehicle available for personal use during off-duty hours?</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>35 Was the vehicle used primarily by a more than 5% owner or related person?</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>36 Is another vehicle available for personal use?</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

### Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons (see page 8 of the instructions)

37 Do you maintain a written policy statement that prohibits all personal use of vehicles including commuting by your employees? [ ] Yes [ ] No

38 Do you maintain a written policy statement that prohibits personal use of vehicles except commuting by your employees? [ ] Yes [ ] No

See page 8 of the instructions for vehicles used by corporate officers, directors or 1% or more owners.

39 Do you treat all use of vehicles by employees as personal use? [ ] Yes [ ] No

40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles and retain the information received? [ ] Yes [ ] No

41 Do you meet the requirements concerning qualified automobile demonstration use? (See page 9 of the instructions) [ ] Yes [ ] No

*Note: If your answer to 37, 38, 39, 40 or 41 is "Yes," do not complete Section B for the covered vehicles.

### Part VI - Amortization

<table>
<thead>
<tr>
<th>(a) Description of costs</th>
<th>(b) Date amortization begins</th>
<th>(c) Amortizable amount</th>
<th>(d) Code section</th>
<th>(e) Amortization period or percentage</th>
<th>(f) Amortization for this year</th>
</tr>
</thead>
<tbody>
<tr>
<td>42 Amortization of costs that begins during your 2002 tax year (see page 9 of the instructions)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>43 Amortization of costs that began before your 2002 tax year</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>44 Total Add amounts in column (f) See page 9 of the instructions for where to report</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Description of Property

**GENERAL DEPRECIATION**

**DEPRECIATION**

<table>
<thead>
<tr>
<th>Asset description</th>
<th>Date placed in service</th>
<th>Unadjusted Cost or basis</th>
<th>Bus %</th>
<th>30% &amp; ITC Reduction in basis</th>
<th>Basis for depreciation</th>
<th>Beginning Accumulated depreciation</th>
<th>Ending Accumulated depreciation</th>
<th>Method</th>
<th>Conv</th>
<th>Life</th>
<th>ACRS class</th>
<th>MACRS class</th>
<th>Current-year 179 expense</th>
<th>Current-year depreciation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1997 COMPUTERS</td>
<td>1997</td>
<td>4,881 100 000</td>
<td></td>
<td></td>
<td>4,881</td>
<td>4,600</td>
<td>4,881</td>
<td>200DE</td>
<td>HY</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td></td>
<td>261</td>
</tr>
<tr>
<td>1998 COMPUTERS</td>
<td>1998</td>
<td>1,885 100 000</td>
<td></td>
<td></td>
<td>1,885</td>
<td>1,559</td>
<td>1,776</td>
<td>200DE</td>
<td>HY</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td></td>
<td>217</td>
</tr>
<tr>
<td>1998 FURN/FIXTURES</td>
<td>1998</td>
<td>15,227 100 000</td>
<td></td>
<td></td>
<td>15,227</td>
<td>12,596</td>
<td>14,350</td>
<td>200DE</td>
<td>HY</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td></td>
<td>1,754</td>
</tr>
<tr>
<td>1999 FURN/FIXTURES</td>
<td>1999</td>
<td>2,937 100 000</td>
<td></td>
<td></td>
<td>2,937</td>
<td>2,091</td>
<td>2,429</td>
<td>200DE</td>
<td>HY</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td></td>
<td>339</td>
</tr>
<tr>
<td>1999 COMP S'WARE</td>
<td>1999</td>
<td>2,207 100 000</td>
<td></td>
<td></td>
<td>2,207</td>
<td>1,839</td>
<td>2,207</td>
<td>SL</td>
<td>3 000</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td></td>
<td>369</td>
</tr>
<tr>
<td>2000 FURN/FIXTURES</td>
<td>2000</td>
<td>765 100 000</td>
<td></td>
<td></td>
<td>765</td>
<td>398</td>
<td>545</td>
<td>200DE</td>
<td>HY</td>
<td>5</td>
<td>5</td>
<td>5</td>
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<td>147</td>
</tr>
<tr>
<td>2000 COMPUTERS</td>
<td>2000</td>
<td>6,187 100 000</td>
<td></td>
<td></td>
<td>6,187</td>
<td>3,217</td>
<td>4,405</td>
<td>200DE</td>
<td>HY</td>
<td>5</td>
<td>1,198</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2000 COMP S'WARE</td>
<td>2000</td>
<td>1,065 100 000</td>
<td></td>
<td></td>
<td>1,065</td>
<td>533</td>
<td>888</td>
<td>SL</td>
<td>3 000</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td></td>
<td>355</td>
</tr>
<tr>
<td>2001 FURN/FIXTURES</td>
<td>2001</td>
<td>295 100 100</td>
<td></td>
<td></td>
<td>295</td>
<td>59</td>
<td>153</td>
<td>200DE</td>
<td>HY</td>
<td>5</td>
<td>94</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2001 COMPUTERS</td>
<td>2001</td>
<td>5,511 100 000</td>
<td></td>
<td></td>
<td>5,511</td>
<td>1,102</td>
<td>2,866</td>
<td>200DE</td>
<td>HY</td>
<td>5</td>
<td>1,764</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2001 COMP S'WARE</td>
<td>2001</td>
<td>5,196 100 000</td>
<td></td>
<td></td>
<td>5,196</td>
<td>866</td>
<td>2,598</td>
<td>SL</td>
<td>3 000</td>
<td>5</td>
<td>1,732</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2002 COMPUTERS</td>
<td>2002</td>
<td>14,428 100 000</td>
<td></td>
<td></td>
<td>14,428</td>
<td>2,886</td>
<td>200DE</td>
<td>HY</td>
<td>5</td>
<td>2,886</td>
<td>5</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Less Retired Assets**

<table>
<thead>
<tr>
<th>Subtotals</th>
<th>60,584</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>60,584</td>
</tr>
<tr>
<td></td>
<td>28,860</td>
</tr>
<tr>
<td></td>
<td>39,984</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>11,124</td>
</tr>
</tbody>
</table>

**Listed Property**

**AMORTIZATION**

<table>
<thead>
<tr>
<th>Asset description</th>
<th>Date placed in service</th>
<th>Cost or basis</th>
<th>Accumulated amortization</th>
<th>Ending Accumulated amortization</th>
<th>Code</th>
<th>Life</th>
<th>Current-year amortization</th>
</tr>
</thead>
</table>

### TOTALS

<table>
<thead>
<tr>
<th>Subtotals</th>
<th>60,584</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>60,584</td>
</tr>
<tr>
<td></td>
<td>28,860</td>
</tr>
<tr>
<td></td>
<td>39,984</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>11,124</td>
</tr>
</tbody>
</table>

*Assets Retired

5/09/2003 10 11 21 V02-5 301222 000