Form 5500-SF

Department of the Treasury Internal Revenue Service

Department of Labor Employee Benefits Security Administration Pension Benefit Guaranty Corporation

Short Form Annual Return/Report of Small Employee **Benefit Plan**

This form is required to be filed under sections 104 and 4065 of the Employee Retirement Income Security Act of 1974 (ERISA), and section 6058(a) of the Internal Revenue Code (the Code).

▶ Complete all entries in accordance with the instructions to the Form 5500-SF.

OMB Nos. 1210-0110 1210-0089

2009

This Form is Open to Public Inspection

	art I Annual Report Identification Information							
For	For calendar plan year 2009 or fiscal plan year beginning 01/01/2009 and ending 12/31/2009							
A	This return/report is for:	multiple-e	employer plan (not multiemployer)		nt plan			
В -	This return/report is for: first return/report	final retur	n/report					
	an amended return/report	short plar	year return/report (less than 12 m	onths)				
C	Check box if filing under: Form 5558	automatio	extension		DFVC program			
	special extension (enter descripti	on)						
Pa	Int II Basic Plan Information—enter all requested inform	,						
	Name of plan	idilori		1b	Three-digit			
	ICAL ASSOCIATES OF THE TONAWANDAS, P.C., MONEY PENS	SION PLAN			plan number	002		
				4.	(PN) •			
				10	Effective date of 01/01/1			
	Plan sponsor's name and address (employer, if for single-employer	r plan)		2b	Employer Identif			
MEDI	ICAL ASSOCIATES OF THE TONAWANDAS, P.C.			20	(EIN) 16-1136			
33 TL	JRNBERRY DRIVE			20	2c Plan sponsor's telephone number 716-690-2211			
WILL	IAMSVILLE, NY 14221-8203			2d	2d Business code (see instructions)			
32	Plan administrator's name and address (if same as Plan sponsor, e	ntor "Com	, "\	3h	621111			
	ICAL ASSOCIATES OF THE TONAWANDA 33 TURNBE	RRY DRIV	E	35	3b Administrator's EIN 16-1136136			
	WILLIAMSV	ILLE, NY 1	4221-8203	3c	Administrator's t	elephone number		
4 11	f the name and/or EIN of the plan sponsor has changed since the la	st return/re	port filed for this plan, enter the	4b	EIN			
r	name, EIN, and the plan number from the last return/report. Sponso	or's name		40	PN			
52	Total number of participants at the beginning of the plan year				PN			
						1		
b Total number of participants at the end of the plan year			5b	1				
C Total number of participants with account balances as of the end of the plan year (defined benefit plans do not complete this item)			. 5c		1			
6a	Were all of the plan's assets during the plan year invested in eligit	ole assets?	(See instructions.)			X Yes No		
b	Are you claiming a waiver of the annual examination and report of					X Yes ☐ No		
	under 29 CFR 2520.104-46? (See instructions on waiver eligibility If you answered "No" to either 6a or 6b, the plan cannot use F		•			V les No		
Pa	rt III Financial Information	01111 0000	or and must misted use roim o					
7	Plan Assets and Liabilities		(a) Beginning of Year		(b) End of Year			
а	Total plan assets	7a	138780)2		1929007		
b	Total plan liabilities	. 7b	128	50				
С	Net plan assets (subtract line 7b from line 7a)	7с	138655	52		1929007		
8	Income, Expenses, and Transfers for this Plan Year		(a) Amount		(b) Total			
а	Contributions received or receivable from:	0-(4)	1625					
	(1) Employers		1023	00				
	(2) Participants	` '						
b	(3) Officia findiudina follovers)							
	, , , ,		52620	15				
C	Other income (loss)	8b	52620)5		542455		
c d	, , , ,	8b	52620)5		542455		
	Other income (loss)	8b 8c	52620	05		542455		
d	Other income (loss)	8b 8c	52620	05		542455		
d	Other income (loss)	8b 8c 8d 8d 8e	52620	05		542455		
d e	Other income (loss)	8b 8c 8d 8e 8f	52620	05		542455		
d e f	Other income (loss)	8b 8c 8c 8d 8e 8f 8g	52620	05				
d e f g	Other income (loss)	8b 8c 8c 8d 8d 8e 8f 8g 8h 8i	52620	05		542455 542455		

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Part IV	Plan	Charac	teristics

HERE

SIGN HERE Signature of plan administrator

Signature of employer/plan sponsor

Filed with incorrect/unrecognized electronic signature.

9a If the plan provides pension benefits, enter the applicable pension feature codes from the List of Plan Characteristic Codes in the instructions:

b If the plan provides welfare benefits, enter the applicable welfare feature codes from the List of Plan Characteristic Codes in the instructions:

	· · · · · · · · · · · · · · · · · · ·							
art	V Compliance Questions							
0	During the plan year:		Yes	No	Α	mount		
а	Was there a failure to transmit to the plan any participant contributions within the time period described in 29 CFR 2510.3-102? (See instructions and DOL's Voluntary Fiduciary Correction Program)	10a		X				
b	Were there any nonexempt transactions with any party-in-interest? (Do not include transactions reported on line 10a.)	10b		X				
С	Was the plan covered by a fidelity bond?	10c	Χ			250000		
d	Did the plan have a loss, whether or not reimbursed by the plan's fidelity bond, that was caused by fraud or dishonesty?	10d		Χ				
е	Were any fees or commissions paid to any brokers, agents, or other persons by an insurance carrier, insurance service or other organization that provides some or all of the benefits under the plan? (See instructions.)	10e		X				
f	Has the plan failed to provide any benefit when due under the plan?	10f		X				
g	Did the plan have any participant loans? (If "Yes," enter amount as of year end.)	10g		Χ				
_	If this is an individual account plan, was there a blackout period? (See instructions and 29 CFR 2520.101-3.)	10h		Χ				
i	If 10h was answered "Yes," check the box if you either provided the required notice or one of the exceptions to providing the notice applied under 29 CFR 2520.101-3	10i		X				
art	VI Pension Funding Compliance							
11	Is this a defined benefit plan subject to minimum funding requirements? (If "Yes," see instructions and complete Schedule SB (Form 5500))							
2	Is this a defined contribution plan subject to the minimum funding requirements of section 412 of the Code or section 302 of ERISA? Yes No							
	(If "Yes," complete 12a or 12b, 12c, 12d, and 12e below, as applicable.)							
а	If a waiver of the minimum funding standard for a prior year is being amortized in this plan year, see instruc							
If .	granting the waiver	th		Day .	\	'ear		
	If you completed line 12a, complete lines 3, 9, and 10 of Schedule MB (Form 5500), and skip to line 13. b Enter the minimum required contribution for this plan year							
				12c		16250		
	Enter the amount contributed by the employer to the plan for this plan year			12d		0		
e	Will the minimum funding amount reported on line 12d be met by the funding deadline?				X Yes	No N/A		
	VII Plan Terminations and Transfers of Assets							
	Has a resolution to terminate the plan been adopted during the plan year or any prior year?					☐ Yes X No		
Ju	If "Yes," enter the amount of any plan assets that reverted to the employer this year			 13a		100 100		
b								
	of the PBGC?					Yes X No		
С	If during this plan year, any assets or liabilities were transferred from this plan to another plan(s), identify the plan(s) to which assets or liabilities were transferred. (See instructions.)							
1	13c(1) Name of plan(s):			(2) EII	13c(3) PN(s)			
Caut	ion: A penalty for the late or incomplete filing of this return/report will be assessed unless reasonable	le cau	se is	establ	ished.	1		
Jnde SB o	er penalties of perjury and other penalties set forth in the instructions, I declare that I have examined this returned the set of t	ırn/rep	ort, in	cluding	g, if applicab			
elie	f, it is true, correct, and complete.							
SIG	Filed with authorized/valid electronic signature. 05/19/2010 THOMAS D HYZ	Y						

Date

Date

06/25/2010

Enter name of individual signing as plan administrator

Enter name of individual signing as employer or plan sponsor

MOHAMAD BALTI