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990-PF

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

OMB No 1545-0052

2007

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

For calendar year 2007, or tax year beginning , 2007, and ending

G Check all that apply Initial return Final return ☒ Amended return Address change Name changeUse the IRS  
label.  
Otherwise,  
print  
or type.  
See Specific  
Instructions.

Name of foundation

VINE AND BRANCHES FOUNDATION, INC.  
C/O THE LEGACY GROUP, INC.

A Employer identification number

39-1827808

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

Room/suite

B Telephone number (see page 10 of the instructions)

125 N. EXECUTIVE DRIVE SUITE 206

(262) 754-2799

City or town, state, and ZIP code

BROOKFIELD, WI 53005

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐H Check type of organization ☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$

37,045,158.

J Accounting method ☒ Cash ☐ Accrual☐ Other (specify) \_\_\_\_\_

(Part I, column (d) must be on cash basis)

**Part I Analysis of Revenue and Expenses** (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions) )

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>				
1 Contributions, gifts, grants, etc., received (attach schedule)				
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	200,249.	200,249.		STMT 1
4 Dividends and interest from securities	345,363.	345,363.		STMT 2
5a Gross rents	150.	150.	NONE	
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	2,028,858.			
b Gross sales price for all assets on line 6a	23,077,524.			
7 Capital gain net income (from Part IV, line 2)		2,028,858.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)	68,737.	250.		STMT 3
12 Total. Add lines 1 through 11	2,643,357.	2,574,870.	NONE	
<b>Operating and Administrative Expenses</b>				
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)	17,955.	NONE	NONE	17,955.
c Other professional fees (attach schedule)	562,120.	300,582.		261,538.
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions)	86,354.	17,876.		
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings	14,177.			14,177.
22 Printing and publications				
23 Other expenses (attach schedule) STMT 6	24,974.	14,248.		10,726.
24 Total operating and administrative expenses. Add lines 13 through 23	705,580.	332,706.	NONE	304,396.
25 Contributions, gifts, grants paid	2,556,873.			2,556,873.
26 Total expenses and disbursements. Add lines 24 and 25	3,262,453.	332,706.	NONE	2,861,269.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	-619,096.			
b Net investment income (if negative, enter -0-)		2,242,164.		
c Adjusted net income (if negative, enter -0-)			NONE	

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions. \*\*STMT 5

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**Part II Balance Sheets**

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing . . . . .			
	2 Savings and temporary cash investments . . . . .	3,274,408.	808,473.	810,568.
	3 Accounts receivable ▶ Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less allowance for doubtful accounts ▶			
	5 Grants receivable . . . . .			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use . . . . .			
	9 Prepaid expenses and deferred charges . . . . .			
	10 a Investments - U S and state government obligations (attach schedule)			
	b Investments - corporate stock (attach schedule) STMT 7.	27,649,177.	5,662,454.	5,427,508.
	c Investments - corporate bonds (attach schedule) STMT 8.	1,517,254.	1,013,738.	1,002,570.
	11 Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶	966,421.	966,421.	3,500,000.
	12 Investments - mortgage loans . . . . .			
	13 Investments - other (attach schedule) STMT 9.	NONE	26,304,512.	26,304,512.
	14 Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
15 Other assets (describe ▶)				
16 <b>Total assets</b> (to be completed by all filers - see the instructions Also, see page 1, item I) . . . . .	33,407,260.	34,755,598.	37,045,158.	
<b>Liabilities</b>	17 Accounts payable and accrued expenses . . . . .			
	18 Grants payable . . . . .			
	19 Deferred revenue . . . . .			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule) . . . . .			
	22 Other liabilities (describe ▶)			
	23 <b>Total liabilities</b> (add lines 17 through 22) . . . . .			
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here ▶</b> <input type="checkbox"/>			
	<b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	24 Unrestricted . . . . .			
	25 Temporarily restricted . . . . .			
	26 Permanently restricted . . . . .			
	<b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶</b> <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds . . . . .			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund . . . . .			
	29 Retained earnings, accumulated income, endowment, or other funds . . . . .	33,407,260.	34,755,598.	
	30 <b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .	33,407,260.	34,755,598.	
31 <b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .	33,407,260.	34,755,598.		

**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	33,407,260.
2 Enter amount from Part I, line 27a . . . . .	2	-619,096.
3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 10 . . . . .	3	2,011,034.
4 Add lines 1, 2, and 3 . . . . .	4	34,799,198.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 11 . . . . .	5	43,600.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 . . . . .	6	34,755,598.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)			(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a SEE PART IV SCHEDULE</b>					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a					
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a					
b					
c					
d					
e					
<b>2 Capital gain net income or (net capital loss)</b> . . . . .			<b>2</b>	<b>2,028,858.</b>	
<b>3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)</b> If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8. . . . .			<b>3</b>		

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? . . . . ☐ Yes ☒ No

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2006	3,002,851.	37,199,320.	0.080723
2005	1,403,623.	37,111,316.	0.037822
2004	1,861,209.	36,009,039.	0.051687
2003	1,405,748.	32,460,973.	0.043306
2002	1,468,386.	31,931,866.	0.045985
<b>2 Total of line 1, column (d)</b> . . . . .			<b>2</b> 0.259523
<b>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</b> . . . . .			<b>3</b> 0.051905
<b>4 Enter the net value of noncharitable-use assets for 2007 from Part X, line 5</b> . . . . .			<b>4</b> 37,822,417.
<b>5 Multiply line 4 by line 3</b> . . . . .			<b>5</b> 1,963,173.
<b>6 Enter 1% of net investment income (1% of Part I, line 27b)</b> . . . . .			<b>6</b> 22,422.
<b>7 Add lines 5 and 6</b> . . . . .			<b>7</b> 1,985,595.
<b>8 Enter qualifying distributions from Part XII, line 4</b> . . . . .			<b>8</b> 2,861,269.

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		
	Date of ruling letter _____ (attach copy of ruling letter if necessary - see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	22,422.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2	3	22,422.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	NONE
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	5	22,422.
6	<b>Credits/Payments</b>		
a	2007 estimated tax payments and 2006 overpayment credited to 2007	6a	68,468.
b	Exempt foreign organizations-tax withheld at source	6b	NONE
c	Tax paid with application for extension of time to file (Form 8868)	6c	NONE
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	68,468.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9	6,710.
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10	46,046.
11	Enter the amount of line 10 to be <b>Credited to 2008 estimated tax</b> <b>52,756. Refunded</b>	11	

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>		X
c Did the foundation file <b>Form 1120-POL</b> for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ _____ (2) On foundation managers \$ _____		
e Enter the reimbursement (if any) paid by the organization during the year for political expenditure tax imposed on foundation managers \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	X	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions)		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? <i>If "No," attach explanation</i>	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2007 or the taxable year beginning in 2007 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		X

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**Part VII-A Statements Regarding Activities (continued)**

11a	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions) . . . . .	11a		X
b	If "Yes," did the foundation have a binding written contract in effect on August 17, 2006, covering the interest, rents, royalties, and annuities described in the attachment for line 11a? . . . . .	11b		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract? . . . . .	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>WWW.VINEANDBRANCHESFOUNDATION.ORG</u>	13	X	
14	The books are in care of ► <u>THE LEGACY GROUP, INC.</u> Telephone no ► <u>(262) 754-2799</u> Located at ► <u>BROOKFIELD, WI</u> ZIP + 4 ► <u>53005</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-F in lieu of Form 1041 - Check here . . . . . N/A . . . . . and enter the amount of tax-exempt interest received or accrued during the year . . . . . 15			

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required****File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? . . . . . <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	N/A
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2007? . . . . .	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2007, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2007? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see page 22 of the instructions) . . . . .	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . . <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2007 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2007) . . . . .	3b	X
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . .	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2007? . . . . .	4b	X

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

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

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

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

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

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

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

**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? ☐ **5b** N/A

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

**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No **N/A**

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

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

**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ **6b** X

If you answered "Yes" to 6b, also file Form 8870

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ **7b** X

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1 List all officers, directors, trustees, foundation managers and their compensation (see page 23 of the instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 12		NONE	NONE	NONE

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

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

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

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**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3 Five highest-paid independent contractors for professional services** (see page 23 of the instructions). If none, enter "NONE."

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

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

	Expenses
1 THE VINE & BRANCHES FOUNDATION INC IS ORGANIZED AND OPERATED FOR THE SOLE PURPOSE OF MAKING CASH CONTRIBUTIONS TO QUALIFYING PUBLIC CHARITIES. THE FOUNDATION DOES NOT ENGAGE	
2 IN ANY OTHER DIRECT CHARITABLE ACTIVITIES.	
3	
4	

**Part IX-B Summary of Program-Related Investments** (see page 24 of the instructions)

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

	Amount
1 NOT APPLICABLE	
2	
All other program-related investments. See page 24 of the instructions	
3 NONE	

Total. Add lines 1 through 3 . . . . .

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	33,869,770.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	1,028,623.
<b>c</b>	Fair market value of all other assets (see page 25 of the instructions)	<b>1c</b>	3,500,000.
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	38,398,393.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	NONE
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	38,398,393.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	<b>4</b>	575,976.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	37,822,417.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	1,891,121.

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

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	1,891,121.
<b>2a</b>	Tax on investment income for 2007 from Part VI, line 5	<b>2a</b>	22,422.
<b>b</b>	Income tax for 2007 (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	22,422.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	1,868,699.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b>	Add lines 3 and 4	<b>5</b>	1,868,699.
<b>6</b>	Deduction from distributable amount (see page 25 of the instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	1,868,699.

**Part XII Qualifying Distributions** (see page 26 of the instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	2,861,269.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	NONE
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	NONE
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	NONE
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	NONE
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	2,861,269.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	<b>5</b>	22,422.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	2,838,847.

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

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

	(a) Corpus	(b) Years prior to 2006	(c) 2006	(d) 2007
<b>1</b> Distributable amount for 2007 from Part XI, line 7 . . . . .				1,868,699.
<b>2</b> Undistributed income, if any, as of the end of 2006				
<b>a</b> Enter amount for 2006 only . . . . .				
<b>b</b> Total for prior years . . . . .				
<b>3</b> Excess distributions carryover, if any, to 2007				
<b>a</b> From 2002 . . . . . 524,965.				
<b>b</b> From 2003 . . . . . 17,971.				
<b>c</b> From 2004 . . . . . 28,012.				
<b>d</b> From 2005 . . . . . NONE				
<b>e</b> From 2006 . . . . . 1,259,777.				
<b>f</b> Total of lines 3a through e . . . . .	1,830,725.			
<b>4</b> Qualifying distributions for 2007 from Part XII, line 4 ▶ \$ 2,861,269.				
<b>a</b> Applied to 2006, but not more than line 2a . . .				
<b>b</b> Applied to undistributed income of prior years (Election required - see page 27 of the instructions) . . . . .				
<b>c</b> Treated as distributions out of corpus (Election required - see page 27 of the instructions) . . . . .				
<b>d</b> Applied to 2007 distributable amount . . . . .				1,868,699.
<b>e</b> Remaining amount distributed out of corpus . .	992,570.			
<b>5</b> Excess distributions carryover applied to 2007 . (If an amount appears in column (d), the same amount must be shown in column (a) )				
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,823,295.			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .				
<b>c</b> 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 . . . . .				
<b>d</b> Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions . . . . .				
<b>e</b> Undistributed income for 2006 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions . . . . .				
<b>f</b> Undistributed income for 2007 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2008 . . . . .				
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions) . . . . .				
<b>8</b> Excess distributions carryover from 2002 not applied on line 5 or line 7 (see page 27 of the instructions) . . . . .	524,965.			
<b>9</b> Excess distributions carryover to 2008. Subtract lines 7 and 8 from line 6a . . . . .	2,298,330.			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2003 . . . . . 17,971.				
<b>b</b> Excess from 2004 . . . . . 28,012.				
<b>c</b> Excess from 2005 . . . . . NONE				
<b>d</b> Excess from 2006 . . . . . 1,259,777.				
<b>e</b> Excess from 2007 . . . . . 992,570.				

Form 990-PF (2007)

**Part XIV Private Operating Foundations** (see page 27 of the instructions and Part VII-A, question 9) **NOT APPLICABLE**

**1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2007, enter the date of the ruling . . . . .

**b** Check box to indicate whether the foundation is a private operating foundation described in section

4942(j)(3) or

4942(j)(5)

**2 a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .

Tax year	Prior 3 years				(e) Total
	(a) 2007	(b) 2006	(c) 2005	(d) 2004	
b 85% of line 2a . . . . .					
c Qualifying distributions from Part XII line 4 for each year listed . . . . .					
d Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c . . . . .					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon					
<b>a</b> "Assets" alternative test - enter					
(1) Value of all assets . . . . .					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .					
<b>b</b> "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed . . . . .					
<b>c</b> "Support" alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) . . . . .					
(3) Largest amount of support from an exempt organization . . . . .					
(4) Gross investment income . . . . .					

**Part XV Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see page 28 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) )

JOHN W. FINDLEY

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

NONE

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

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

NONE

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> <i>Paid during the year</i> SEE STATEMENT 17				2,556,873.
<b>Total</b> . . . . .			▶ <b>3a</b>	2,556,873.
<b>b</b> <i>Approved for future payment</i> SEE STATEMENT 18				85,127.
<b>Total</b> . . . . .			▶ <b>3b</b>	85,127.

Form 990-PF (2007)

**Part XVI-A Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated

	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions )
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
<b>1</b> Program service revenue					
<b>a</b> _____					
<b>b</b> _____					
<b>c</b> _____					
<b>d</b> _____					
<b>e</b> _____					
<b>f</b> _____					
<b>g</b> Fees and contracts from government agencies					
<b>2</b> Membership dues and assessments . . . . .					
<b>3</b> Interest on savings and temporary cash investments			14	200,249.	
<b>4</b> Dividends and interest from securities . . . . .			14	345,363.	
<b>5</b> Net rental income or (loss) from real estate					
<b>a</b> Debt-financed property . . . . .					
<b>b</b> Not debt-financed property . . . . .			16	150.	
<b>6</b> Net rental income or (loss) from personal property .					
<b>7</b> Other investment income . . . . .			18	68,737.	
<b>8</b> Gain or (loss) from sales of assets other than inventory			18	2,028,858.	
<b>9</b> Net income or (loss) from special events . . . . .					
<b>10</b> Gross profit or (loss) from sales of inventory . .					
<b>11</b> Other revenue <b>a</b> _____					
<b>b</b> _____					
<b>c</b> _____					
<b>d</b> _____					
<b>e</b> _____					
<b>12</b> Subtotal. Add columns (b), (d), and (e) . . . . .				2,643,357.	
<b>13</b> Total. Add line 12, columns (b), (d), and (e) . . . . .				13	2,643,357.

(See worksheet in line 13 instructions on page 29 to verify calculations.)

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



**Line No.** Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 29 of the instructions.)

NOT APPLICABLE

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

- [illegible]

- | (a) Name of organization | (b) Type of organization | (c) Description of relationship |
|--------------------------|--------------------------|---------------------------------|
|                          |                          |                                 |
|                          |                          |                                 |
|                          |                          |                                 |
|                          |                          |                                 |
|                          |                          |                                 |

Sign Here	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 	Date 1/3/10	Title PRESIDENT
Paid Preparer's Use Only	Preparer's signature 	Date 12/22/09	Check if self-employed <input type="checkbox"/>
	Firm's name (or yours if self-employed), address, and ZIP code PRICEWATERHOUSECOOPERS LLP 100 EAST WISCONSIN AVENUE MILWAUKEE, WI 53202		Preparer's SSN or PTIN (See <b>Signature</b> on page 30 of the instructions) P00159945 EIN 13-4008324 Phone no 414-212-1600

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**SCHEDULE D**  
**(Form 1041)**

Department of the Treasury  
Internal Revenue Service

# Capital Gains and Losses

► **Attach to Form 1041, Form 5227, or Form 990-T. See the separate instructions for Form 1041 (also for Form 5227 or Form 990-T, if applicable).**

OMB No 1545-0092

**2007**

Name of estate or trust **VINE AND BRANCHES FOUNDATION, INC.**

Employer identification number

**C/O THE LEGACY GROUP, INC.**

**39-1827808**

**Note:** Form 5227 filers need to complete **only** Parts I and II

**Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Sales price	(e) Cost or other basis (see page 40 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a					

b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b . . . . .	<b>1b</b>	<b>682,054.</b>
2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 . . . . .	<b>2</b>	
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts . . . . .	<b>3</b>	
4 Short-term capital loss carryover Enter the amount, if any, from line 9 of the 2006 Capital Loss Carryover Worksheet . . . . .	<b>4</b>	( )
5 <b>Net short-term gain or (loss).</b> Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back. . . . . ►	<b>5</b>	<b>682,054.</b>

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

(a) Description of property (Example 100 shares 7% preferred of "Z" Co)	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Sales price	(e) Cost or other basis (see page 40 of the instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a					

b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b. . . . .	<b>6b</b>	<b>1,346,804.</b>
7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 . . . . .	<b>7</b>	
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts . . . . .	<b>8</b>	
9 Capital gain distributions . . . . .	<b>9</b>	
10 Gain from Form 4797, Part I . . . . .	<b>10</b>	
11 Long-term capital loss carryover Enter the amount, if any, from line 14 of the 2006 Capital Loss Carryover Worksheet . . . . .	<b>11</b>	( )
12 <b>Net long-term gain or (loss).</b> Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back. . . . . ►	<b>12</b>	<b>1,346,804.</b>

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2007

**Part III Summary of Parts I and II****Caution:** Read the instructions *before* completing this part

		(1) Beneficiaries' (see page 41)	(2) Estate's or trust's	(3) Total
<b>13</b>	<b>Net short-term gain or (loss)</b> . . . . .	<b>13</b>		682,054.
<b>14</b>	<b>Net long-term gain or (loss):</b>			
a	Total for year . . . . .	<b>14a</b>		1,346,804.
b	Unrecaptured section 1250 gain (see line 18 of the wrkst) . . . .	<b>14b</b>		
c	28% rate gain . . . . .	<b>14c</b>		
<b>15</b>	<b>Total net gain or (loss).</b> Combine lines 13 and 14a . . . . . ▶	<b>15</b>		2,028,858.

**Note:** If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and **do not** complete Part IV. If line 15, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

**Part IV Capital Loss Limitation**

<b>16</b>	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the <b>smaller</b> of a The loss on line 15, column (3) or b \$3,000 . . . . .	<b>16</b>	( )
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**Note:** If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** on page 42 of the instructions to figure your capital loss carryover.

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

**Form 1041 filers.** Complete this part **only** if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

**Caution:** Skip this part and complete the worksheet on page 43 of the instructions if

- Either line 14b, col (2) or line 14c, col (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero

**Form 990-T trusts.** Complete this part **only** if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the worksheet on page 43 of the instructions if either line 14b, col (2) or line 14c, col (2) is more than zero.

<b>17</b>	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34) . . .	<b>17</b>		
<b>18</b>	Enter the <b>smaller</b> of line 14a or 15 in column (2) but not less than zero . . . . .	<b>18</b>		
<b>19</b>	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T) . .	<b>19</b>		
<b>20</b>	Add lines 18 and 19 . . . . .	<b>20</b>		
<b>21</b>	If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0- . . ▶	<b>21</b>		
<b>22</b>	Subtract line 21 from line 20. If zero or less, enter -0- . . . . .	<b>22</b>		
<b>23</b>	Subtract line 22 from line 17. If zero or less, enter -0- . . . . .	<b>23</b>		
<b>24</b>	Enter the <b>smaller</b> of the amount on line 17 or \$2,150 . . . . .	<b>24</b>		
<b>25</b>	Is the amount on line 23 equal to or more than the amount on line 24? <input type="checkbox"/> <b>Yes.</b> Skip lines 25 through 27, go to line 28 and check the "No" box <input type="checkbox"/> <b>No.</b> Enter the amount from line 23 . . . . .	<b>25</b>		
<b>26</b>	Subtract line 25 from line 24 . . . . .	<b>26</b>		
<b>27</b>	Multiply line 26 by 5% ( 05) . . . . .	<b>27</b>		
<b>28</b>	Are the amounts on lines 22 and 26 the same? <input type="checkbox"/> <b>Yes.</b> Skip lines 28 thru 31, go to line 32 <input type="checkbox"/> <b>No.</b> Enter the smaller of line 17 or line 22	<b>28</b>		
<b>29</b>	Enter the amount from line 26 (If line 26 is blank, enter -0-) . . . . .	<b>29</b>		
<b>30</b>	Subtract line 29 from line 28 . . . . .	<b>30</b>		
<b>31</b>	Multiply line 30 by 15% ( 15) . . . . .	<b>31</b>		
<b>32</b>	Figure the tax on the amount on line 23. Use the 2007 Tax Rate Schedule on page 27 of the instructions . . . . .	<b>32</b>		
<b>33</b>	Add lines 27, 31, and 32 . . . . .	<b>33</b>		
<b>34</b>	Figure the tax on the amount on line 17. Use the 2007 Tax Rate Schedule on page 27 of the instructions . . . . .	<b>34</b>		
<b>35</b>	<b>Tax on all taxable income.</b> Enter the <b>smaller</b> of line 33 or line 34 here and on line 1a of Schedule G, Form 1041 (or line 36 of Form 990-T). . . . .	<b>35</b>		

Schedule D (Form 1041) 2007



Department of the Treasury  
Internal Revenue Service

► See instructions for Schedule D (Form 1041).

▶ Attach to Schedule D to list additional transactions for lines 1a and 6a.

2007

Name of estate or trust

Employer identification number

VINE AND BRANCHES FOUNDATION, INC.

39-1827808

**Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**[illegible]

<b>1b. Total.</b> Combine the amounts in column (f). Enter here and on Schedule D, line 1b . . . . .	682,054.
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**For Paperwork Reduction Act Notice, see the Instructions for Form 1041.**

Schedule D-1 (Form 1041) 2007

Employer identification number

[illegible]

<b>6b. Total.</b> Combine the amounts in column (f) Enter here and on Schedule D, line 6b . . . . .	<b>1,346,804.</b>
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Schedule D-1 (Form 1041) 2007

## Contributions Paid Between 1-1-07 and 12-31-07

### Vine and Branches Foundation, Inc.

39-1827808

Organization Name/Address	Date Paid	Amount	Purpose	Title	Exempt	Relation
Acts 1:8 Ministry Incorporated 2121 S. Oneida St. Green Bay, WI 54304	05/22/2007	\$30,000.00	Religious	Establishment of Madison satellite office	Yes	No
Arlington Pregnancy Center, Inc. 2810 NW Green Oaks Blvd. Arlington, TX 76012	12/13/2007	\$2,500.00	Charitable	General operations	Yes	No
Broom Tree Ministries P O Box 180681 Delafield, WI 53018	10/31/2007	\$5,000 00	Religious	General operations	Yes	No
Camp Mamto-wish YMCA, Inc. P O Box 246 Boulder Junction, WI 54512	12/31/2007	\$2,000 00	Charitable	need to be determined by director	Yes	No
Chicago Hope Academy 2189 W. Bowler Street Chicago, IL 60612	06/04/2007	\$50,000 00	Educational	Spiritual Life Development	Yes	No
Christian Stewardship Foundation/NCF 150 N. Sunnyslope Road, Suite 360 Brookfield, WI 53005	02/20/2007	\$500,000 00	Charitable	Vine & Branches Fund- CSF	Yes	No
Christian Stewardship Foundation/NCF 150 N. Sunnyslope Road, Suite 360 Brookfield, WI 53005	10/22/2007	\$200,000.00	Charitable	Vine & Branches Fund- CSF	Yes	No
Christian Stewardship Foundation/NCF 150 N. Sunnyslope Road, Suite 360 Brookfield, WI 53005	12/13/2007	\$375,000.00	Charitable	Vine & Branches Fund- CSF	Yes	No
City on a Hill, Inc. 2224 W. Kilbourn Avenue Milwaukee, WI 53233	05/22/2007	\$50,000.00	Charitable	General operations	Yes	No
Family House, Inc. 3269 N. 11th Street Milwaukee, WI 53206	12/13/2007	\$10,000 00	Charitable	General programs	Yes	No

**Vine and Branches Foundation, Inc.****39-1827808**

<b>Organization Name/Address</b>	<b>Date Paid</b>	<b>Amount</b>	<b>Purpose</b>	<b>Title</b>	<b>Exempt</b>	<b>Relation</b>
Fellowship of Christian Athletes Eastern Wisconsin Office 135 West Broadway Waukesha, WI 53186	12/04/2007	\$10,000.00	Charitable	Coaches marriage retreat	Yes	No
First Things First, Inc. 620 Lindsay Street Suite 100 Chattanooga, TN 37403	12/04/2007	\$75,000.00	Charitable	National training initiative - media production	Yes	No
Focus on the Family 8605 Explorer Drive Colorado Springs, CO 80995-0354	09/05/2007	\$67,000.00	Religious	Mobile Content Project	Yes	No
Georgia Family Education and Research Council 5550 Triangle Parkway, Suite 160 Norcross, GA 30092	09/05/2007	\$50,000.00	Charitable	Community Marriage Initiatives	Yes	No
Greater Milwaukee Foundation, Inc. c/o Greater Milwaukee Foundation 1020 N Broadway Milwaukee, WI 53202	12/04/2007	\$18,000.00	Charitable	Nonprofit Management Fund in Waukesha County capacity building fund	Yes	No
Greater Milwaukee Foundation, Inc. c/o Greater Milwaukee Foundation 1020 N. Broadway Milwaukee, WI 53202	12/04/2007	\$30,000.00	Charitable	Nonprofit Management Fund capacity building fund and BoardStar	Yes	No
Habitat for Humanity International, Inc. Waukesha PO Box 1143 Menomonee Falls, WI 53052	11/15/2007	\$7,500.00	Charitable	HomeStore of Waukesha County affiliate	Yes	No
Heartlove Place, Inc. 3229 N. Dr. Martin Luther King, Jr. Dr. Milwaukee, WI 53212	09/05/2007	\$15,000.00	Educational	Dare to Be a Daniel youth evangelism training program	Yes	No
Institute for Creation Research P.O. Box 59029 Dallas, TX 75229	12/13/2007	\$7,500.00	Educational	General program activities	Yes	No
InterVarsity Christian Fellowship of the United States of America WI/UP of MI Division 516 E. Wisconsin Avenue, Suite F Appleton, WI 54911	12/04/2007	\$10,000.00	Religious	Pastoral Care Coordinator/Spiritual Director position for Wisc & Upper Michigan	Yes	No

**Vine and Branches Foundation, Inc.****39-1827808**

Organization Name/Address	Date Paid	Amount	Purpose	Title	Exempt	Relation
Leadership Network 2626 Cole Suite 900 Dallas, TX 75204	05/22/2007	\$200,000.00	Religious	Generous Giving Leadership Church Community and Encore Generation programs	Yes	No
Livin' Ignited NFP P.O. Box 1233 Wheaton, IL 60189	10/31/2007	\$1,000.00	Religious	General operations	Yes	No
Living Lands & Waters Restoration Organization 17624 Route 84 N East Moline, IL 61244	07/17/2007	\$5,000.00	Charitable	General operations	Yes	No
Milwaukee Community Service Corps, Inc. 1441 North 7th Street Milwaukee, WI 53205	12/13/2007	\$2,500.00	Charitable	Undesignated	Yes	No
Minority Christian Coaches Association 6833 West Fond du Lac Ave., Suite 204 Milwaukee, WI 53218	05/22/2007	\$50,000.00	Charitable	Operations and capacity building	Yes	No
National Christian Foundation c/o Donald Cathy 5200 Buffington Road Atlanta, GA 30349	07/24/2007	\$250,000.00	Charitable	Marriage and Family Legacy Fund - Healthy Marriages marketing campaign	Yes	No
National Network of Youth Ministries 12335 World Trade Drive Suite 16 San Diego, CA 92128-3791	05/22/2007	\$50,000.00	Religious	Operation Turn the Tide, with special emphasis in Wisconsin and Great Lakes	Yes	No
Nativity Jesuit Middle School 1515 S. 29th Street Milwaukee, WI 53215-1912	12/13/2007	\$5,000.00	Educational	Marquette University High School scholarship fund for Nativity students and the Annual Fund	Yes	No
Neighborhood House of Milwaukee, Inc. 2819 W. Richardson Place Milwaukee, WI 53208	12/13/2007	\$4,500.00	Charitable	General operations	Yes	No
New Life Community Church, Assemblies of God, Inc. N9590 County Road ES Mukwonago, WI 53149	12/13/2007	\$2,500.00	Religious	Facility improvements and equipment	Yes	No

**Vine and Branches Foundation, Inc.****39-1827808**

Organization Name/Address	Date Paid	Amount	Purpose	Title	Exempt	Relation
Opportunity International, Inc 2122 York Road Suite 150 Oak Brook, IL 60523	12/13/2007	\$2,500.00	Charitable	General fund	Yes	No
Pastoral Leadership Institute 12300 Ford Road Suite #450 Dallas, TX 75234	09/05/2007	\$75,000 00	Religious	Retreat component of pastoral leadership program	Yes	No
Providence High School 1215 N. St. Mary's Street San Antonio, TX 78215	12/13/2007	\$1,000 00	Educational	Unrestricted	Yes	No
Saint Anthony on the Lake Catholic Church W280 N2101 Hwy SS Pewaukee, WI 53072	12/13/2007	\$2,500 00	Religious	General fund	Yes	No
Shepherds Baptist Ministries, Inc 1805 Fifteenth Avenue Union Grove, WI 53182-1297	12/13/2007	\$2,500 00	Charitable	General operations	Yes	No
Teen Challenge International, Inc - Milwaukee WI P.O. Box 250771 Milwaukee, WI 53225	12/13/2007	\$3,000.00	Charitable	General operations	Yes	No
Teen Mania Ministries, Inc P.O. Box 2000 Garden Valley, TX 75771	09/05/2007	\$50,000.00	Religious	Wisconsin Acquire the Fire	Yes	No
The Center For Teaching Entrepreneurship 2821 N. 4th Street Suite 305, Dept 58 Milwaukee, WI 53212-2366	12/13/2007	\$1,500.00	Educational	General operations	Yes	No
The Foundation for a Great Marriage, Inc 1270 Main Street, Suite 246 Green Bay, WI 54302	05/22/2007	\$100,000 00	Charitable	Wisconsin Healthy Marriage Initiative	Yes	No
The Refuge at River Falls 6600 White Bluff Trail Amarillo, TX 79118	12/13/2007	\$10,000 00	Charitable	Pastoral couple marriage intensives	Yes	No

**Vine and Branches Foundation, Inc.****39-1827808**

<b>Organization Name/Address</b>	<b>Date Paid</b>	<b>Amount</b>	<b>Purpose</b>	<b>Title</b>	<b>Exempt</b>	<b>Relation</b>
The Transforming Center P O Box 374 Warrenville, IL 60555	08/22/2007	\$7,700.00	Religious	Organizational capacity matching grant	Yes	No
The Transforming Center P O Box 374 Warrenville, IL 60555	12/04/2007	\$11,168.00	Religious	Organizational capacity matching grant	Yes	No
The Transforming Center P O Box 374 Warrenville, IL 60555	12/31/2007	\$6,005.00	Religious	Organizational capacity matching grant	Yes	No
The YMCA of the Triangle Area c/o Camp Seafarer 2744 Seafarer Road Arapahoe, NC 28510	12/13/2007	\$1,000.00	Charitable	Camp Seafarer annual campaign	Yes	No
Wisconsin and Northern Michigan Council of the Assemblies of God P O Box 309 1340 Berlin Street Waupaca, WI 54981	05/22/2007	\$30,000.00	Religious	Youth Alive campus missionary mobilization and training	Yes	No
Wisconsin Family Council, Inc. P O. Box 2075 Madison, WI 53701-2075	09/05/2007	\$75,000 00	Educational	SALT Ministries - Pastors Conferences Project	Yes	No
Wisconsin Province of Jesuits Marion Center for Nonprofits 3195 S. Superior St., Rm. 101 Milwaukee, WI 53207	12/13/2007	\$3,000 00	Religious	Ignatian Associates	Yes	No
Word of Hope Ministries, Inc. 2677 N. 40th Street Milwaukee, WI 53210	01/03/2007	\$25,000 00	Charitable	Job training, placement, retention and support services	Yes	No
Young Life 1220 Broadway Suite 1805 Lubbock, TX 79401	05/22/2007	\$15,000.00	Charitable	Summer camp	Yes	No
Youth for Christ USA Inc P O Box 081041 Racine, WI 53408	05/22/2007	\$31,855.00	Religious	Continued support of 3- Story launch and youth worker training	Yes	No
Youth for Christ USA Inc. 303 East 9th Street Fond Du Lac, WI 54935	05/22/2007	\$16,000 00	Religious	Multi-component capacity support	Yes	No

**Vine and Branches Foundation, Inc.****39-1827808**

Organization Name/Address	Date Paid	Amount	Purpose	Title	Exempt	Relation
Youth for Christ USA Inc Box 36 Spring Green, WI 53588	05/22/2007	\$2,145.00	Religious	CORE Youth Worker specialized training	Yes	No

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**\$2,556,873.00**



***Contributions approved for payment in future years, as of 12/31/07***

**Vine and Branches Foundation, Inc.**

**39-1827808**

<b>Organization</b>	<b>Amount to be Paid</b>	<b>Purpose</b>	<b>Exempt</b>	<b>Relation</b>
<b>Georgia Family Education and Research C</b> Norcross, GA		Charitable	Yes	No
	<u>\$50,000.00</u>			
<b>Hideaway Foundation</b> Amarillo, TX		Charitable	Yes	No
	<u>\$10,000.00</u>			
<b>The Transforming Center</b> Warrenville, IL		Religious	Yes	No
	<u>\$25,127.00</u>			
<b>Total carried forward</b>	<u><u>\$85,127.00</u></u>			

**FORM 990-PF - PART IV**  
**CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis	Gain or (loss)	
6,546,057.		SEE STATEMENT 16 - GOLDMAN SACHS SHORT T				VARIOUS	VARIOUS
		6,425,484.				120,573.	
2,482,630.		SEE STATEMENT 16 - GOLDMAN SACHS LONG TE				VARIOUS	VARIOUS
		2,192,616.				290,014.	
		ALPHA+ MANAGERS: PORTFOLIO 2 SHORT TERM				VARIOUS	VARIOUS
						-12,100.	
		ALPHA+ MANAGERS: PORTFOLIO 4 SHORT TERM				VARIOUS	VARIOUS
						-45,168.	
		ALPHA+ MANAGERS: PORTFOLIO 2 LONG TERM				VARIOUS	VARIOUS
						-8,369.	
		ALPHA+ MANAGERS: PORTFOLIO 4 LONG TERM				VARIOUS	VARIOUS
						-44,558.	
19,181.		GAIN ON DISPOSAL OF FORTRESS INVESTMENT				05/04/2007	11/14/2007
		18,862.				319.	
500,000.		GAIN ON DISPOSAL OF 3,465.99 SHS ARTISAN				6/29/2006	6/29/2007
		403,223.				96,777.	
2,611,304.		GAIN ON DISPOSAL OF 18,023.30 SHS ARTISA				06/29/2006	10/31/2007
		2,096,778.				514,526.	
2,500,000.		GAIN ON DISPOSAL OF 31,983.62 SHS LARGE				06/29/2006	01/31/2007
		2,294,217.				205,783.	
400,000.		GAIN ON DISPOSAL OF 5,039.24 SHS LARGE C				06/29/2006	04/30/2007
		361,470.				38,530.	

**FORM 990-PF - PART IV**  
**CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis	Gain or (loss)	
250,000.		GAIN ON DISPOSAL OF 3,074.65 SHS LARGE C				06/29/2006	06/29/2007
		220,548.				29,452.	
500,000.		GAIN ON DISPOSAL OF 5,605.00 SHS OF LARG				06/29/2006	10/31/2007
		402,053.				97,947.	
2,500,000.		GAIN ON DISPOSAL OF 15,271.75 SHS OF LAR				06/29/2006	01/31/2007
		2,189,434.				310,566.	
400,000.		GAIN ON DISPOSAL OF 2,346.80 SHS OF LARG				06/29/2006	04/30/2007
		336,449.				63,551.	
250,000.		GAIN ON DISPOSAL OF 1,439.08 SHS OF LARG				06/29/2006	06/29/2007
		206,314.				43,686.	
500,000.		GAIN ON DISPOSAL OF 2,941.35 SHS OF LARG				06/29/2006	10/31/2007
		421,687.				78,313.	
500,000.		GAIN ON DISPOSAL OF 3,661.23 SHS WILLIAM				06/29/2006	06/29/2007
		369,063.				130,937.	
750,000.		GAIN ON DISPOSAL OF 4,962.88 SHS OF WILL				06/29/2006	10/31/2007
		500,273.				249,727.	
2,368,352.		LOSS ON SALE OF GOLDMAN SACHS DIRECT STR				06/30/2006	VARIOUS
		2,500,000.				-131,648.	

**FORM 990-PF - PART IV**  
**CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj. basis		Gain or (loss)	
TOTAL GAIN (LOSS) .....							----- 2,028,858. =====	

## FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
GOLDMAN SACHS INTEREST	200,249.	200,249.
TOTAL	200,249.	200,249.

## FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
GOLDMAN SACHS - DIVIDENDS	265,121.	265,121.
FORTRESS INVESTMENT GROUP LLC DIVIDENDS	89.	89.
FORTRESS INVESTMENT GROUP LLC INTEREST	51.	51.
ALPHA+ MANAGERS: PORTFOLIO 4 DIVIDENDS	26,735.	26,735.
ALPHA+ MANAGERS: PORTFOLIO 4 INTEREST	84.	84.
GS CAP PARTNERS VI PARALLEL DIVIDENDS	8,170.	8,170.
GS CAP PARTNERS VI PARALLEL INTEREST	950.	950.
ALPHA+ MANAGERS: PORTFOLIO 2 DIVIDENDS	32,279.	32,279.
THL EQUITY FUND VI INTEREST	11,884.	11,884.
	-----	-----
TOTAL	345,363.	345,363.
	=====	=====

## FORM 990PF, PART I - OTHER INCOME

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
2006 OVERPAYMENT APPLIED	68,468.	NONE
FORTRESS INVESTMENT GROUP LLC	32.	13.
MISCELLANEOUS INCOME	237.	237.
OTHER MISCELLANEOUS INCOME		
TOTALS	68,737.	250.

## FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
ALPHA+ MANAGERS PORTFOLIO 2			
MANAGEMENT & INVESTMENT FEES	24,519.	24,519.	
ALPHA+ MANAGERS: PORTFOLIO 4			
MANAGEMENT & INVESTMENT FEES	42,784.	42,784.	
GOLDMAN SACHS MANAGEMENT FEES	225,805.	225,805.	
LEGACY GROUP MANAGEMENT FEES	261,538.		261,538.
GS CAP PARTNERS VI PARALLEL			
MANAGEMENT & INVESTMENT FEES	7,474.	7,474.	
TOTALS	562,120.	300,582.	261,538.



FORM 990PF, PART I - TAXES

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
-----	-----	-----
PROPERTY TAXES ON INVESTMENT	17,073.	17,073.
MISCELLANEOUS STATE TAXES PAID	10.	NONE
OVERPAYMENT APPLIED	68,468.	NONE
FOREIGN TAX PAID ON INVESTMENT	803.	803.
	-----	-----
TOTALS	86,354.	17,876.
	=====	=====

## FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
-----	-----	-----	-----
INSURANCE	2,484.		2,484.
TELEPHONE	172.		172.
DUES & SUBSCRIPTIONS	5,995.		5,995.
IT EXPENSES	1,289.		1,289.
POSTAGE	61.		61.
OFFICE SUPPLIES	365.		365.
MISCELLANEOUS EXPENSES	360.		360.
GS OTHER EXPENSES	2,583.	2,583.	
ALPHA+ MANAGERS PORTFOLIO 2			
OTHER EXPENSES	66.	66.	
ALPHA+ MANAGERS PORTFOLIO 4			
OTHER EXPENSES	436.	436.	
GS CAP PARTNERS VI PARALLEL			
OTHER EXPENSES	11,163.	11,163.	
	-----	-----	-----
TOTALS	24,974.	14,248.	10,726.
	=====	=====	=====

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
GOLDMAN SACHS A/C 39482-1	NONE	NONE
GOLDMAN SACHS A/C 39496-1	NONE	NONE
GOLDMAN SACHS A/C 39499-5	1,753,901.	2,045,684.
GOLDMAN SACHS A/C 39493-8	41,899.	17,710.
GOLDMAN SACHS A/C 41212-8	1,503,480.	1,568,424.
GOLDMAN SACHS A/C 39494-6	1,864,624.	1,779,215.
MEDIQUEST THERAPEUTICS	498,550.	16,475.
TOTALS	5,662,454.	5,427,508.

FORM 990PF, PART II - CORPORATE BONDS

=====

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
-----	-----	---
GOLDMAN SACHS A/C 39482-1	507,018.	486,075.
GOLDMAN SACHS A/C 39496-1	506,720.	516,495.
	-----	-----
TOTALS	1,013,738.	1,002,570.
	=====	=====

## FORM 990PF, PART II - OTHER INVESTMENTS

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
LARGE CAP GROWTH MANAGERS	1,233,675.	1,233,675.
LARGE CAP VALUE MANAGERS	1,253,877.	1,253,877.
WELLINGTON SMALL CAP CORE	1,531,781.	1,531,781.
DONALD SMITH SMALL CAP VALUE	1,489,778.	1,489,778.
ALPHA+ MANAGERS PORTFOLIO 2	1,504,375.	1,504,375.
ALPHA+ MANAGERS PORTFOLIO 4	2,461,943.	2,461,943.
VONTOBEL NON-US EQUITY	1,509,349.	1,509,349.
WILLIAM BLAIR NON-US EQUITY	2,235,372.	2,235,372.
GS EMERGING MARKETS EQTY CL A	560,971.	560,971.
GS INTL REAL ESTATE SECS FUND	560,895.	560,895.
EKSPORTFINANS ASA 0% DUE		
5/9/2010 LKD TO SX5E	500,004.	500,004.
EKSPORTFINANS ASA 0% DUE		
5/29/2009 LKD TO EEM	500,000.	500,000.
EKSPORTFINANS ASA 0% DUE		
5/19/2010 LKD TO MXEA		
GS GBL STRATEGIC ENERGY FUND	1,500,000.	1,500,000.
GS LIBERTY HARBOR I	1,204,506.	1,204,506.
GS WEST STREET PORTFOLIOS	1,966,070.	1,966,070.
GS WEST STREET PARTNERS II	1,057,665.	1,057,665.
THL EQUITY FUND VI - GS ACCESS	1,198,647.	1,198,647.
GS CAP PARTNERS VI PARALLEL LP	621,021.	621,021.
GS MEZZANINE PARTENRS V	1,996,963.	1,996,963.
GS WLR OPP FUND OFFSHORE	417,983.	417,983.
GS PRIVATE CONCENTRATED ENERGY	502,194.	502,194.
	497,443.	497,443.
TOTALS	26,304,512.	26,304,512.

FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES  
=====

DESCRIPTION -----	AMOUNT -----
OUTSTANDING CHECKS	19,505.
UNREALIZED GAIN/LOSS & RECONCILIATION ADJUSTMENT	1,991,529.
	-----
TOTAL	2,011,034.
	=====

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES  
=====DESCRIPTION  
-----AMOUNT  
-----

PY OUTSTANDING CHECKS

43,600.

TOTAL

-----  
43,600.  
=====

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

TITLE AND AVERAGE HOURS PER  
WEEK DEVOTED TO POSITION

NAME AND ADDRESS

PRESIDENT/TREASURER

JOHN W. FINDLEY  
125 N. EXECUTIVE DRIVE SUITE 206

VICE-PRESIDENT

BARBARA R. FINDLEY  
125 N. EXECUTIVE DRIVE SUITE 206

SECRETARY

RICHARD J. BLISS  
C/O GODFREY & KAHN, S.C.  
780 NORTH WATER STREET

GRAND TOTALS



FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS  
=====

PAT WOHRER V&B C/O THE LEGACY GRP  
125 N. EXECUTIVE DR STE 206  
BROOKFIELD, WI 53005  
262-754-2799

990PF, PART XV - FORM AND CONTENTS OF SUBMITTED APPLICATIONS  
=====

A BRIEF LETTER OF INQUIRY INCLUDING A DESCRIPTION OF YOUR  
ORGANIZATION AND THE WORK FOR WHICH THE FUNDS WILL BE APPLIED MUST  
FIRST BE SUBMITTED.

990PF, PART XV - SUBMISSION DEADLINES

=====

TELEPHONE FOR CURRENT SCHEDULE OF DEADLINE DATES AS APPLICATION  
PROCESS SHOULD BE COMPLETED SIX WEEKS PRIOR TO EACH OF THREE DIRECTORS  
MEETINGS PER YEAR.

VINE AND BRANCHES FOUNDATION, INC  
FEIN 39-1827808  
FORM 990-PF PART IV

Capital Gain And Loss Summary

Account #	<u>Goldman Sachs</u>					Total
	Proceeds	Short-Term Basis	Gain/Loss	Proceeds	Long-Term Basis	
020-39499-5	849,254	837,224	12,030	240,249	198,972	53,308
020-39496-1	1,956,080	1,963,161	(7,081)	407,120	403,411	(10,790)
020-41212-8	344,420	251,994	92,426	445,755	312,902	225,278
020-39494-6	326,291	250,694	75,597	388,962	271,104	193,455
020-39482-1	3,070,013	3,122,411	(52,398)	1,000,544	1,006,226	(58,080)
GS Subtotal	6,546,057	6,425,484	120,573	2,482,630	2,192,616	410,587

Department of the Treasury  
Internal Revenue Service

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

OMB No 1545-1709

► File a separate application for each return

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

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

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

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

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

<b>Type or print</b>  File by the due date for filing your return. See instructions.	Name of Exempt Organization <b>VINE AND BRANCHES FOUNDATION, INC.</b>	Employer identification number
	<b>C/O THE LEGACY GROUP, INC.</b>	<b>39-1827808</b>
	Number, street, and room or suite no. If a P.O. box, see instructions.	
	<b>125 N. EXECUTIVE DRIVE SUITE 206</b>	
City, town or post office, state, and ZIP code. For a foreign address, see instructions.		
<b>BROOKFIELD, WI 53005</b>		

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

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

- The books are in the care of ► **THE LEGACY GROUP, INC.**

Telephone No. ► **262 754-2799** FAX No. ► \_\_\_\_\_

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

**1** I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **08/15, 2008**, to file the exempt organization return for the organization named above. The extension is for the organization's return for

- ☒ calendar year **2007** or
- ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

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

<b>3a</b> If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$ <b>4,809.</b>
<b>b</b> If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	<b>3b</b>	\$ <b>68,468.</b>
<b>c Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$ <b>NONE</b>

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

For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. 4-2008)

• If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☒ **X**

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

• If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1)

**Part II Additional (Not Automatic) 3-Month Extension of Time. You must file original and one copy.**

Type or print  File by the extended due date for filing the return. See instructions	Name of Exempt Organization <b>VINE AND BRANCHES FOUNDATION, C/O THE LEGACY GROUP, INC.</b>	Employer identification number <b>39-1827808</b>
	Number, street, and room or suite no. If a P O box, see instructions <b>125 N. EXECUTIVE DRIVE SUITE 206</b>	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions <b>BROOKFIELD, WI 53005</b>	

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

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

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

• The books are in the care of **THE LEGACY GROUP, INC.**

Telephone No **262 754-2799**

FAX No.

• If the organization does not have an office or place of business in the United States, check this box ☐

• If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

4 I request an additional 3-month extension of time until **11/15/2008**

5 For calendar year **2007**, or other tax year beginning  and ending

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

7 State in detail why you need the extension **ADDITIONAL TIME IS REQUIRED TO GATHER**

**SUFFICIENT EVIDENCE TO COMPLETE THE RETURN.**

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a \$	4,809.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8b \$	68,468.
c <b>Balance Due.</b> Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	8c \$	NONE

**Signature and Verification**

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

Signature

Title

Date

PRICEWATERHOUSECOOPERS LLP  
100 EAST WISCONSIN AVENUE  
MILWAUKEE, WI 53202

Form **8868** (Rev 4-2008)