



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



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

2008

Department of the Treasury
Internal Revenue Service (77)

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

For calendar year 2008, or tax year beginning , 2008, and ending

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.Comer Science & Education Foundation
c/o Lawrence Richman
Two North LaSalle Street #2200
Chicago, IL 60602-3882

A Employer identification number

36-4244783

B Telephone number (see the instructions)

312-269-8070

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, column (c), line 16)

\$ 142,239,022.

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 the instructions).)

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

REVENUE

1 Contributions, gifts, grants, etc. received (att sch)

60,285,899.

2 ☐ If the foundn is not req to att Sch B

3 Interest on savings and temporary cash investments

25,474.

25,474.

4 Dividends and interest from securities

286,062.

285,193.

5a Gross rents

b Net rental income or (loss)

6a Net gain/(loss) from sale of assets not on line 10

-16,236.

b Gross sales price for all assets on line 6a

98,172.

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

0.

8 Net short-term capital gain

9 Income modifications

10a Gross sales less returns and allowances

2,662,025.

b Less: Cost of goods sold

3,497,385.

c Gross profit/(loss) (att sch). See St 1

-835,360.

11 Other income (attach schedule)

See Statement 2

-1,026,978.

12,000.

12 Total. Add lines 1 through 11.

58,718,861.

322,667.

0.

ADMINISTRATIVE AND OPERATING EXPENSES

13 Compensation of officers, directors, trustees, etc.

46,956.

46,956.

14 Other employee salaries and wages

995,367.

964,298.

15 Pension plans, employee benefits

221,776.

231,871.

16a Legal fees (attach schedule). See St 3

481,978.

457,910.

b Accounting fees (attach sch) See St 4

97,464.

90,964.

c Other prof fees (attach sch) See St 5

220,363.

213,011.

17 Interest

78,669.

78,669.

18 Taxes (attach schedule). See Stmt 6

852,385.

13.

434,773.

19 Depreciation (attach sch) and depletion

1,541,165.

20 Occupancy

21 Travel, conferences, and meetings

61,694.

61,694.

22 Printing and publications

23 Other expenses (attach schedule)

See Statement 7

7,082,292.

14,157.

7,094,881.

24 Total operating and administrative expenses. Add lines 13 through 23

11,680,109.

14,170.

9,675,027.

25 Contributions, gifts, grants paid Part XV

27,926,571.

18,938,291.

26 Total expenses and disbursements. Add lines 24 and 25

39,606,680.

14,170.

0.

28,613,318.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

19,112,181.

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

308,497.

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

0.

AS AMENDED

SCANNED NOV 28 2011

Part I 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

ASSETS

1	Cash — non-interest-bearing	255,814.	169,096.	169,096.
2	Savings and temporary cash investments	1,558,181.	3,457,291.	3,457,719.
3	Accounts receivable			
	Less: allowance for doubtful accounts			
4	Pledges receivable			
	Less: allowance for doubtful accounts			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
7	Other notes and loans receivable (attach sch)	28,003,376.		
	Less: allowance for doubtful accounts	652,354.	244,272.	27,351,022.
8	Inventories for sale or use	3,840,254.	3,200,864.	3,200,864.
9	Prepaid expenses and deferred charges	57,134.	67,474.	67,474.
10a	Investments — U.S. and state government obligations (attach schedule)			
b	Investments — corporate stock (attach schedule)	609,643.	547,117.	546,689.
c	Investments — corporate bonds (attach schedule)			
11	Investments — land, buildings, and equipment: basis			
	Less: accumulated depreciation (attach schedule)			
12	Investments — mortgage loans			
13	Investments — other (attach schedule)			
14	Land, buildings, and equipment: basis	42,348,670.		
	Less: accumulated depreciation (attach schedule) See Stmt 8	3,670,052.	40,734,077.	38,678,618.
15	Other assets (describe See Statement 9)	11,965.	68,767,540.	68,767,540.
16	Total assets (to be completed by all filers — see instructions. Also, see page 1, item I).	47,311,340.	142,239,022.	142,239,022.

LIABILITIES

17	Accounts payable and accrued expenses	514,848.	1,010,915.	
18	Grants payable		8,988,280.	
19	Deferred revenue		15,245.	
20	Loans from officers, directors, trustees, & other disqualified persons			
21	Mortgages and other notes payable (attach schedule)	3,558,019.	1,116,251.	
22	Other liabilities (describe)	50,179.		
23	Total liabilities (add lines 17 through 22)	4,123,046.	11,130,691.	

NET ASSETS OR FUND BALANCES

	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.	<input checked="" type="checkbox"/>		
24	Unrestricted		62,340,791.	
25	Temporarily restricted		68,767,540.	
26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.	<input type="checkbox"/>		
27	Capital stock, trust principal, or current funds		25,000	
28	Paid-in or capital surplus, or land, building, and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds		43,163,294	
30	Total net assets or fund balances (see the instructions)		43,188,294.	131,108,331.
31	Total liabilities and net assets/fund balances (see the instructions)		47,311,340.	142,239,022.

Part II 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	43,188,294.
2	Enter amount from Part I, line 27a	2	19,112,181.
3	Other increases not included in line 2 (itemize) See Statement 10	3	68,807,856.
4	Add lines 1, 2, and 3	4	131,108,331.
5	Decreases not included in line 2 (itemize)	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	131,108,331.

AS AMENDED

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 shares MLC Company)

(b) How acquired
P — Purchase
D — Donation(c) Date acquired
(month day, year)(d) Date sold
(month day, year)

1a M&I Trust Short Term Capital Gains	P	Various	Various
b M&I Long Term Capital Gains	P	Various	Various
c M&I Trust Long Term Capital Dividend	P	Various	Various
d Global Research Technologies K-1	P	Various	Various
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 58,305.		70,588.	-12,283.
b 39,860.		43,820.	-3,960.
c 7.			7.
d		50,741.	-50,741.
e			

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

(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
a			-12,283.
b			-3,960.
c			7.
d			-50,741.
e			

2 Capital gain net income or (net capital loss)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	2	-66,977.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 8, column (c) (see the instructions). If (loss), enter -0- in Part I, line 8 </div>	3	0.

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes☒ No

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

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2007	13,379,141.	8,729,885.	1.532568
2006	18,564,491.	27,539,519.	0.674104
2005	20,758,842.	51,984,982.	0.399324
2004	12,875,689.	61,275,435.	0.210128
2003	12,217,861.	65,807,637.	0.185660

2 Total of line 1, column (d)	2	3.001784
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	3	0.600357
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5.	4	6,683,849.
5 Multiply line 4 by line 3	5	4,012,696.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	3,085.
7 Add lines 5 and 6	7	4,015,781.
8 Enter qualifying distributions from Part XII, line 4	8	28,613,318.

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.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see the instructions)

1 a 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	3,085.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	3,085.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	3,085.
6 Credits/Payments			
a 2008 estimated tax pmts and 2007 overpayment credited to 2008	6a	58,312.	
b Exempt foreign organizations – tax withheld at source.	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	58,312.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	55,227.	
11 Enter the amount of line 10 to be: Credited to 2009 estimated tax 55,227. Refunded	11	0.	

Part VII Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?		X
If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities.		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? If 'Yes,' attach a conformed copy of the changes		X
4 a 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 Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T.		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? If 'Yes,' complete Part II, column (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) IL		
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 General Instruction G? If 'No,' attach explanation	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 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)? If 'Yes,' complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses See Statement 11	X	

BAA

Form 990-PF (2008)

Part VII-A Statements Regarding Activities Continued

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>Vicki Kalnins</u> Telephone no. <u>262-798-5080</u> Located at <u>20875 Crossroads Circle #100 Waukesha WI</u> ZIP + 4 <u>53186-4093</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>	N/A		

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 the instructions)? 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 2008?	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 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
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 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. <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
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 2008 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 2008.)	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 2008?	4b	X

BAA

Form 990-PF (2008)

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 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 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?

N/A ☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

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 N/A

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

1 List all officers, directors, trustees, foundation managers and their compensation (see 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
William T. Schleicher, Jr. 20875 Crossroads Circle #100 Waukesha, WI 53186	Secretary 0	0.	0.	0.
Guy Comer 20875 Crossroads Circle #100 Waukesha, WI 53186	President 20.00	46,956.	20,869.	0.
Stephanie Comer 20875 Crossroads Circle #100 Waukesha, WI 53186	Vice Preside 0	0.	0.	0.
Vicki Kalnins 20875 Crossroads Circle Ste 10 Waukesha, WI 53186	Treasurer 0	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1— see 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
Lee Reid 3055 Elliot Lane Homewood, IL 60430	Exec Director 40	179,935.	17,996.	0.
Gregory Mooney 4922 S. Cornell Ave., Unit P Chicago, IL 60615	Exec Director 40	154,000.	23,241.	0.
Wayne Samuels 1229 River Drive Calumet City, IL 60409	Dir Const. Op 40	93,100.	13,747.	0.
Alex Requena 807 Vertin Boulevard Shorewood, IL 60431	IT Manager 40	93,000.	24,037.	0.
Trina Allen 7244 S. Dobson Ave. Chicago, IL 60619	Business Mgr 40	77,000.	13,699.	0.

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

5

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
a	Average monthly fair market value of securities	1a	602,080.
b	Average of monthly cash balances	1b	2,132,127.
c	Fair market value of all other assets (see instructions)	1c	4,051,426.
d	Total (add lines 1a, b, and c)	1d	6,785,633.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	6,785,633.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	101,784.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	6,683,849.
6	Minimum investment return. Enter 5% of line 5	6	334,192.

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

1	Minimum investment return from Part X, line 6	1	334,192.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	3,085.
b	Income tax for 2008 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	3,085.
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	331,107.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	331,107.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	331,107.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes.		
a	Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1a	28,613,318.
b	Program-related investments — total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	28,613,318.
5	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 instructions)	5	3,085.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	28,610,233.

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

BAA

Form 990-PF (2008)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				331,107.
2 Undistributed income, if any, as of the end of 2007:				
a Enter amount for 2007 only			0.	
b Total for prior years: 20__, 20__, 20__		0.		
3 Excess distributions carryover, if any, to 2008:				
a From 2003	8,942,963.			
b From 2004	9,890,765.			
c From 2005	18,379,070.			
d From 2006	17,451,347.			
e From 2007	12,993,089.			
f Total of lines 3a through e	67,657,234.			
4 Qualifying distributions for 2008 from Part XII, line 4 ▶ \$ 28,613,318.				
a Applied to 2007, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2008 distributable amount				331,107.
e Remaining amount distributed out of corpus	28,282,211.			
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	95,939,445.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0.		
d Subtract line 6c from line 6b. Taxable amount — see instructions		0.		
e Undistributed income for 2007. Subtract line 4a from line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2008. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2009.				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2003 not applied on line 5 or line 7 (see instructions)	8,942,963.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	86,996,482.			
10 Analysis of line 9.				
a Excess from 2004	9,890,765.			
b Excess from 2005	18,379,070.			
c Excess from 2006	17,451,347.			
d Excess from 2007	12,993,089.			
e Excess from 2008	28,282,211.			

BAA

Form 990-PF (2008)

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

N/A

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 2008, 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) 2008	(b) 2007	(c) 2006	(d) 2005	
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				
3 Complete 3a, b, or c for the alternative test relied upon:				
a 'Assets' alternative test — enter:				
(1) Value of all assets				
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)				
b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed				
c 'Support' alternative test — enter:				
(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 organization had \$5,000 or more in assets at any time during the year — see instructions.)**1 Information Regarding Foundation Managers:**

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

None

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

None

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

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see 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:

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

c Any submission deadlines

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

Part VII 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
a Paid during the year See Statement 13				
Total			3a	18,938,291.
b Approved for future payment See Statement 14				
Total			3b	8,988,280.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		
1	Program service revenue					
a	Sale of renovated houses					
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	25,474.	
4	Dividends and interest from securities			14	286,062.	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property			16	12,000.	
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory			14	-16,236.	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					-835,360.
11	Other revenue:					
a	Global Research Tech LLC	541700	-1,001,986.			
b	Membership Dues			3	12,321.	
c	Unrealized Gain/Loss			3	-49,313.	
d						
e						
12	Subtotal. Add columns (b), (d), and (e).		-1,001,986.		270,308.	-835,360.
13	Total. Add line 12, columns (b), (d), and (e)				13	-1,567,038.

(See worksheet in the instructions for line 13 to verify calculations.)

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

[illegible]

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

► Attach to Form 990, 990-EZ and 990-PF
► See separate instructions.

OMB No 1545 0047

2008

Name of the organization **Comer Science & Education Foundation
c/o Lawrence Richman**

Employer identification number
36-4244783

Organization type (check one)

Filers of:

Form 990 or 990-EZ

Section:

- ☐ 501(c)() (enter number) organization
☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule** (Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.)

General Rule —

- ☒ For organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor (Complete Parts I and II.)

Special Rules —

- ☐ For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33-1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on Form 990, Part VIII, line 1h or 2% of the amount on Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. (If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the Parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year) ► \$ _____

Caution: Organizations that are not covered by the General Rule and/or the Special Rules do not file Schedule B (Form 990, 990-EZ, or 990-PF) but they **must** answer 'No' on Part IV, line 2 of their Form 990, or check the box in the heading of their Form 990-EZ, or on line 2 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

BAA For Privacy Act and Paperwork Reduction Act Notice, see the instructions for Form 990. These instructions will be issued separately.

Schedule B (Form 990, 990-EZ, or 990-PF) (2008)

Name of organization

Employer identification number

Comer Science & Education Foundation

36-4244783

Part I Contributors (see instructions)

(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Gary C. Comer Revocable Trust 20875 Crossroads Circle Waukesha, WI 53186	\$ 47,393,050.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution.)
2	Spinnaker Investment Inc. 20875 Crossroads Circle Waukesha, WI 53186	\$ 9,600.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution.)
3	Charitable Lead Trust 20875 Crossroads Circle Waukesha, WI 53186	\$ 11,950,304.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
4	Muntu Dance Company 7127 S. Ellis Ave. Chicago, IL 60619	\$ 14,725.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
5	Senator Kwame Raoul 5210 S. Harper Ave. Ste. D Chicago, IL 60615	\$ 7,890.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
6	Microsoft One Microsoft Way Redmond, WA 98052	\$ 446,919.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution.)

AS AMENDED

Employer identification number

36-4244783

Part II

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	Global Research Technologies, LLC		
		\$ 5,409,381.	1/01/08
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
2	Rent Forgiveness		
		\$ 9,600.	Various
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
6	Software Licenses		
		\$ 446,919.	1/01/08
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Schedule B (Form 990, 990-EZ, or 990-PF) (2008)

Name of organization

Employer identification number

Comer Science & Education Foundation

36-4244783

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year. (Complete cols (a) through (e) and the following line entry.)

For organizations completing Part III, enter total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this information once - see instructions.)

► \$ N/A

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

2008

Federal Statements

Page 1

Client CSEFAMD

Comer Science & Education Foundation
c/o Lawrence Richman

36-4244783

11/10/11

08:02AM

Statement 1
Form 990-PF, Part I, Line 10c
Gross Profit (Loss) From Sales Of Inventory

<u>Items Sold</u>	<u>Amount</u>
	\$ 2,662,025.
Gross Sales	\$ 2,662,025.
Less Returns & Allowances	0.
Net Sales	\$ 2,662,025.
Less Cost Of Goods Sold.	3,497,385.
Gross Profit From Sales Of Inventory.	\$ -835,360.

Statement 2
Form 990-PF, Part I, Line 11
Other Income

	<u>(a) Revenue per Books</u>	<u>(b) Net Investment Income</u>	<u>(c) Adjusted Net Income</u>
Global Research Tech LLC	\$ -1,001,986.		
Membership Dues	12,321.		
Rental Income - Noninvestment Property	12,000.	12,000.	
Unrealized Gain/Loss	-49,313.		
Total	\$ -1,026,978.	\$ 12,000.	\$ 0.

Statement 3
Form 990-PF, Part I, Line 16a
Legal Fees

	<u>(a) Expenses Per Books</u>	<u>(b) Net Investment Income</u>	<u>(c) Adjusted Net Income</u>	<u>(d) Charitable Purposes</u>
Legal	\$ 481,978.			\$ 457,910.
Total	\$ 481,978.	\$ 0.	\$ 0.	\$ 457,910.

Statement 4
Form 990-PF, Part I, Line 16b
Accounting Fees

	<u>(a) Expenses per Books</u>	<u>(b) Net Investment Income</u>	<u>(c) Adjusted Net Income</u>	<u>(d) Charitable Purposes</u>
Accounting	\$ 97,464.			\$ 90,964.
Total	\$ 97,464.	\$ 0.	\$ 0.	\$ 90,964.

AS AMENDED

2008

Federal Statements

Page 2

Client CSEFAMD

Comer Science & Education Foundation
c/o Lawrence Richman

36-4244783

11/10/11

08:02AM

Statement 5
Form 990-PF, Part I, Line 16c
Other Professional Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Professional fees	\$ 220,363.			\$ 213,011.
Total	<u>\$ 220,363.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 213,011.</u>

Statement 6
Form 990-PF, Part I, Line 18
Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Federal Taxes ..	\$ -666.			
Foreign Taxes	13.	\$ 13.		
Payroll Taxes	82,496.			\$ 82,496.
Real Estate Taxes ..	770,527.			352,262.
State Taxes	15.			15.
Total	<u>\$ 852,385.</u>	<u>\$ 13.</u>	<u>\$ 0.</u>	<u>\$ 434,773.</u>

Statement 7
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Advertising & Marketing	\$ 80,783.			\$ 80,783.
Bank Fees	2,958.			2,958.
Computer Expense	54,721.			67,542.
Consulting Expense	734,404.			734,404.
Custody Fees	4,126.	\$ 4,126.		
Facilities Management	1,039,136.			1,074,458.
Filing Fees	3,396.			3,280.
Insurance Expense	165,739.			163,256.
Internet Expense	5,659.			5,659.
Investment Fees	10,031.	10,031.		
Janitorial	14,040.			12,840.
Library Materials	294.			294.
Meals & Entertainment	4,204.			4,204.
Meetings & Seminars	2,492.			2,492.
Miscellaneous Expense	32,846.			32,846.
Office Supplies	115,083.			115,055.
Other Admin Expense	1,461.			1,461.
Other Job Costs	1,670,183.			1,669,863.
Other Taxes & Licenses	117,014.			117,014.
Payroll Expense	11,613.			11,333.
Postage & Delivery	3,789.			3,747.
Program Expenses	2,097,256.			2,082,625.
Rental Expenses	5,935.			5,935.
Repairs & Maintenance	90,791.			90,791.

AS AMENDED

2008

Federal Statements

Page 3

Client CSEFAMD

Comer Science & Education Foundation
c/o Lawrence Richman

36-4244783

11/10/11

08:02AM

Statement 7 (continued)
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Security	\$ 324,419.			\$ 324,419.
Shop Expenses	59,271.			59,271.
Telephone Expense	104,184.			103,946.
Utilities	326,464.			324,405.
Total	<u>\$ 7,082,292.</u>	<u>\$ 14,157.</u>	<u>\$ 0.</u>	<u>\$ 7,094,881.</u>

Statement 8
Form 990-PF, Part II, Line 14
Land, Buildings, and Equipment

Category	Basis	Accum. Deprec.	Book Value	Fair Market Value
Auto./Transportation Equip.	\$ 148,104.	\$ 139,573.	\$ 8,531.	\$ 0.
Furniture and Fixtures	1,071,737.	597,534.	474,203.	0.
Machinery and Equipment	566,970.	351,513.	215,457.	0.
Buildings	35,297,188.	2,172,535.	33,124,653.	38,678,618.
Improvements	370,928.	80,360.	290,568.	0.
Land	4,404,499.		4,404,499.	0.
Miscellaneous	489,244.	328,537.	160,707.	0.
Total	<u>\$ 42,348,670.</u>	<u>\$ 3,670,052.</u>	<u>\$ 38,678,618.</u>	<u>\$ 38,678,618.</u>

Statement 9
Form 990-PF, Part II, Line 15
Other Assets

	Book Value	Fair Market Value
Beneficial Interest In Charitable Lead	\$ 68,767,540.	\$ 68,767,540.
Total	<u>\$ 68,767,540.</u>	<u>\$ 68,767,540.</u>

Statement 10
Form 990-PF, Part III, Line 3
Other Increases

Prior period adjustment	\$ 40,316.
Record Beneficial Interest in CLT	68,767,540.
Total	<u>\$ 68,807,856.</u>

AS AMENDED

2008

Federal Statements

Page 4

Client CSEFAMD

Comer Science & Education Foundation
c/o Lawrence Richman

36-4244783

11/10/11

08:02AM

Statement 11
Form 990-PF, Part VII-A, Line 10
Substantial Contributors During the Tax Year

<u>Name of Substantial Contributor</u>	<u>Address of Substantial Contributor</u>
--	---

Beneficial Interest in CLT

20875 Crossroads Circle, Suite 100
Waukesha, WI 53186Statement 12
Form 990-PF, Part VIII, Line 3
Compensation of Five Highest Paid Contractors

<u>Name and Address</u>	<u>Type of Service</u>	<u>Compensation</u>
Delaware Corp. Construction Inc. 6730 W. Emerald Pkwy, Suite 110 Monroe, IL 60449	Construction	290,360.
Health Management Associates 120 N. Washington Square, Suite 705 Lansing, MI 48933	Consulting	344,249.
Neal, Gerber & Eisenberg 28987 Network Place Chicago, IL 60673-1289	Legal	278,329.
Neal & Leroy LLC 203 N. LaSalle Street, Suite 2300 Chicago, IL 60601	Legal	268,282.
Revere Properties Facility Maintenance, LLC 7420 S. Woodlawn Chicago, IL 60619	Building Services	848,888.
Total		<u>\$ 2,030,108.</u>

Statement 13
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Access Community Health Network 1501 South California Avenue Chicago, IL 60608			General Support	\$ 1,000.

AS AMENDED

Client CSEFAMD

Comer Science & Education Foundation
c/o Lawrence Richman

36-4244783

11/10/11

08.02AM

Statement 13 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Clearbrook 1835 W. Central Road Arlington Heights, IL 60005			General Support	\$ 25,000.
Delta Institute 53 W Jackson Blvd, Suite 230 Chicago, IL 60604			General Support	500,000.
Free Spirit Media 1817 S. California Chicago, IL 60608			General Support	25,160.
Goodcity 5049 W. Harrison Chicago, IL 60644			General Support	75,098.
Lamont-Doherty Earth Observatory 61 Route 9W, PO Box 1000 Palisades, NY 10964			General Support	10,140,625.
Minnesota Public Radio 45 7th Street E St. Paul, MN 55101			General Support	200,000.
Neighborhood Housing Service of Chicago 1279 N Milwaukee Ave 5th Floor Chicago, IL 60622			General Support	3,000.
New Leaders for New Schools 850 W. Jackson, Suite 220 Chicago, IL 60607			General Support	1,000.
Oregon State University 306 Kerr Administration Corvallis, OR 97331			General Support	25,343.
Paul Revere Elementary School 1010 E. 72nd Street Chicago, IL 60619			General Support	609,639.
Paul Revere High School Scholarships 1010 E. 72nd Street Chicago, IL 60619			General Support	102,562.

AS AMENDED

2008

Federal Statements

Page 6

Client CSEFAMD

Comer Science & Education Foundation
c/o Lawrence Richman

36-4244783

11/10/11

08.02AM

Statement 13 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Posse Foundation 111 W. Jackson Blvd. Suite 1900 Chicago, IL 60602			General Support	\$ 5,000.
San Miguel School 1949 West 48th Street Chicago, IL 60609			General Support	1,010,000.
Scripps Institution of Oceanography 9500 Gilman Drive La Jolla, CA 92093			General Support	50,000.
South Shore Drill Team 7200 S. Ingleside Chicago, IL 60619			General Support	476,035.
Tax Assistance Program 233 South Wacker Drive, Suite 8630 Chicago, IL 60606			General Support	5,000.
Umoja Student Development Corp 2935 W. Polk Street, Rm 116 Chicago, IL 60612			General Support	30,000.
University of Arizona FRS#427640 PO Box 3520 Tucson, AZ 85722			General Support	49,945.
University of California, Irvine 2301 Berkley Place North Irvine, CA 92697			General Support	110,000.
University of Maine 5717 Corbert Hall Orono, ME 04469			General Support	6,800.
University of Washington 3935 University Way NE Seattle, WA 98105			General Support	110,000.
Woods Hole Oceanographic Institution 221 Oyster Pond Road MS #39 Woods Hole, MA 02543			General Support	8,773.

AS AMENDED

2008

Federal Statements

Page 7

Client CSEFAMD

Comer Science & Education Foundation
c/o Lawrence Richman

36-4244783

11/10/11

08-02AM

Statement 13 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Youth Guidance 122 S. Michigan Ave., Ste. 1510 Chicago, IL 60603			General Support	\$ 1,000.
Beloved Community 1210 West 78th Place Chicago, IL 60620			General Support	10,000.
Bruce Guadalupe Community School 1028 S. 9th Street Milwaukee, WI 53204			General Support	3,000.
Columbia College Chicago 624 S. Michigan Ave. Chicago, IL 60605			General Support	5,000.
Future Youth Association PO Box 256 Hazel Crest, IL 60429			General Support	1,000.
GeoForschungsZentrum Potsdam 14473 Potsdam Telegrafenberg, Potsdam 14473 Germany			General Support	100,000.
Grassroots Grantmakers PO Box G Hellettsville, TX 77964			General Support	2,500.
Junior Achievement of Wisconsin, Inc. 6924 North Port Washington Rd. Milwaukee, WI 53217			General Support	750.
Leadership Greater Chicago 233 North Michigan Ave. Suite 2420 Chicago, IL 60601			General Support	5,000.
Next Door Foundation 2545 North 29th Street Milwaukee, WI 53210			General Support	2,000.
North Dakota State University 1735 NDSU Research Park Drive Fargo, ND 58102			General Support	21,570.

AS AMENDED

2008

Federal Statements

Page 8

Client CSEFAMD

Comer Science & Education Foundation
c/o Lawrence Richman

36-4244783

11/10/11

08:02AM

Statement 13 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Penn State University 110 Technology Center Bldg. University Park, PA 16802			General Support	\$ 110,000.
Save our Children Reward Fund 1210 W. 78th Place Chicago, IL 60620			General Support	5,000.
The CARA Program 703 West Monroe Street Chicago, IL 60661			General Support	10,000.
The Field Museum 1400 Lake Shore Chicago, IL 60605			General Support	1,000,000.
Universidad Nacional de Cordoba Velez Sarsfield 1611 Cordoba, Cordoba X5016 Argentina			General Support	37,944.
University of Chicago Hospitals 5801 S. Ellis Ave., Suite 007 Chicago, IL 60637			General Support	3,384,021.
University of Illinois PO Box 8198 Chicago, IL 60680			General Support	102,850.
University of Minnesota 200 Oak Street SE, Suite 450 Minneapolis, MN 55455			General Support	63,427.
University of Oxford Wellington Square Oxford, Oxford OX12JD United Kingdom			General Support	110,000.
University of Wisconsin 21 N Park Street, Suite 6401 Madison, WI 53715			General Support	25,000.
Urban Prep Academies 120 N Wabash, Suite 203 Chicago, IL 60611			General Support	2,000.

AS AMENDED

2008

Federal Statements

Page 9

Client CSEFAMD

Comer Science & Education Foundation
c/o Lawrence Richman

36-4244783

11/10/11

08:02AM

Statement 13 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
City of Chicago - Public Building Com. 50 West Washington Room 200 Chicago, IL 60602			General Support	\$ 366,249.
Total				<u>\$ 18,938,291.</u>

Statement 14
Form 990-PF, Part XV, Line 3b
Recipient Approved for Future Payment

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Goodcity 5049 W. Harrison Chicago, IL 60644			General Support	\$ 70,000.
Medill School of Journalism 1845 Sheridan Road Evanston, IL 60208			General Support	400,000.
Minnesota Public Radio 45 7th St E St. Paul, MN 55101			General Support	400,000.
University of Chicago Medical Center 5841 S. Maryland Avenue, MC 1115 Chicago, IL 60637			General Support	1,501,763.
Climate Fellowship 20875 Crossroads Circle, Suite 100 Waukesha, WI 53186			General Support	870,300.
Climate Projects 20875 Crossroads Circle, Suite 100 Waukesha, WI 53186			General Support	2,386,217.
San Miguel School 1949 West 48th Street Chicago, IL 60609			General Support	2,000,000.
Delta Revere Program, LLC 53 W. Jackson Blvd, Suite 230 Chicago, IL 60604			General Support	1,360,000.

AS AMENDED

2008

Federal Statements

Page 10

Client CSEFAMD

Comer Science & Education Foundation
c/o Lawrence Richman

36-4244783

11/10/11

08.02AM

Statement 14 (continued)
Form 990-PF, Part XV, Line 3b
Recipient Approved for Future Payment

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Total				\$ 8,988,280.

AS AMENDED

2008

Federal Supplemental Information

Page 1

Client CSEFAMD

Comer Science & Education Foundation
c/o Lawrence Richman

36-4244783

11/11/11

07:54AM

Reason for Amendment:

Comer Science and Education Foundation's 2008 Form 990PF is amended to reflect the adoption of SFAS 117. The amended return reflects in Part I line 27 column (a) an increase to excess revenue over expenses/disbursements of \$9,209,257, an increase to net investment income of \$244,958 (Part I line 27 column (b)), and an increase to disbursements for charitable purposes (Part I line 26 column (d)) of \$651,919. In addition, the Part II balance sheet fund balance increased by \$59,598,599. These changes result in an increase in excise tax due of \$2,450 and resulting reduction in overpayment of tax applied to the 2009 return.

Part X Narrative:

While the Comer Science and Education Foundation's 2008 Form 990PF has a balance sheet fair market value of \$142,239,022; it is the position of the Foundation that a significant portion of the assets are excluded from the minimum investment return calculation as either assets directly used for charitable purpose or as a future interest in a charitable trust.

AS AMENDED

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

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

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

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

Type or print File by the extended due date for filing the return. See instructions.	Name of Exempt Organization	Employer identification number
	Comer Science & Education Foundation c/o Lawrence Richman	36-4244783
	Number, street, and room or suite number. If a P.O. box, see instructions	For IRS use only
	GCI 36-3582963	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	Waukesha, WI 53186	

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 (section 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 care of **Vicki Kalnins**

Telephone No. **262-798-5080** FAX No. **262-798-5087**

- 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**, 20**09**.

5 For calendar year **2008**, or other tax year beginning **_____**, 20**_____**, and ending **_____**, 20**_____**.

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

7 State in detail why you need the extension. **Taxpayer respectfully requests additional time to prepare a complete and accurate tax 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	\$	1,528.
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	\$	58,312.
c Balance Due. 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 instrs.	8c	\$	0.

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 **Treasurer**

Date **_____**

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

OMB No 1545-1709

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

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension — check this box and complete Part I only ☐

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

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

Type or print File by the due date for filing your return. See instructions	Name of Exempt Organization	Employer identification number
	Comer Science & Education Foundation c/o Lawrence Richman	36-4244783
	Number, street, and room or suite number. If a P.O. box, see instructions	
	Two North LaSalle Street #2200	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	Chicago, IL 60602-3882	

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 (section 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 ► Vicki Kalnins

Telephone No. ► 262-798-5080 FAX No. ► 262-798-5087

- 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 8/15, 20 09, to file the exempt organization return for the organization named above.
The extension is for the organization's return for:

- ☒ calendar year 20 08 or
- ☐ tax year beginning _____, 20 _____, and ending _____, 20 _____

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	\$	1,528.
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.	3b	\$	58,312.
c Balance Due. 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.	3c	\$	0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions**BAA For Privacy Act and Paperwork Reduction Act Notice, see instructions.**Form **8868** (Rev 4-2009)