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Form **990-PF**

Return of Private Foundation

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

OMB No 1545-0052

Department of the Treasury Internal Revenue Service

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements. For calendar year 2008, or tax year beginning and ending Initial return Final return Amended return Name change G Check all that apply: Address change Name of foundation A Employer identification number Use the IRS label. 38-2695962 ALFRED B SWANSON FOUNDATION Otherwise, print Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number or type. 2945 BONNELL AVE SE (616) 949-8286 See Specific City or town, state, and ZIP code C If exemption application is pending, check here Instructions. GRAND RAPIDS, MI 49506-3131 D 1. Foreign organizations, check here Foreign organizations meeting the 85% test, check here and attach computation Section 501(c)(3) exempt private foundation H Check type of organization: Section 4947(a)(1) nonexempt charitable trust _____ Other taxable private foundation If private foundation status was terminated under section 507(b)(1)(A), check here Fair market value of all assets at end of year J Accounting method: __ Cash X Accruat Other (specify) (from Part II, col. (c), line 16) If the foundation is in a 60-month termination 760,911. (Part I, column (d) must be on cash basis) ▶\$ under section 507(b)(1)(B), check here Part I Analysis of Revenue and Expenses (d) Disbursements for charitable purposes (cash basis only) (b) Net investment (a) Revenue and (c) Adjusted net (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).) expenses per books income ıncome N/A Contributions, gifts, grants, etc., received Check X If the foundation is not required to attach Sch. B Interest on savings and temporary cash investments 367 367 STATEMENT 31,734 31,734 Dividends and interest from securities 5a Gross rents b Net rental income or (loss) 12,217 68. Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 211,494. 12,217 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain Income modifications 10a Gross sales less returns b Less Cost of goods sold c Gross profit or (loss) 11 Other income 44.318 44.318 Total, Add lines 1 through 11 0. 0 0. 13 Compensation of officers, directors, trustees, etc Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees 5,525 3,315 STMT **b** Accounting fees 7.594 STMT 4 7.594 c Other professional fees 17 Interest 18 Taxes 446 0 19 Depreciation and depletion 20 Оссиралсу 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses STMT 5 20,335 295 19,040. 24 Total operating and administrative 33,900 12.204 19,040. expenses. Add lines 13 through 23 3,948 3,948. Contributions, gifts, grants paid 26 Total expenses and disbursements. 22,988. 37,848 12,204 Add lines 24 and 25 27 Subtract line 26 from line 12: 6.470 8. Excess of revenue over expenses and disbursements 32,114 b Net investment income (if negative, enter -0-) N/A

LHA For Privacy Act and Paperwork Reduction Act Notice, see the instructions.

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

| | Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only | | Beginning of year | End of year | | | |
|----------------------------|--|---|-------------------|----------------|---------------------------------------|--|--|
| | ert_ | Balailee Sileets column should be for end-of-year amounts only | (a) Book Value | (b) Book Value | (c) Fair Market Value | | |
| | 1 | Cash - non-interest-bearing | | 16,885. | 16,885. | | |
| | 2 | Savings and temporary cash investments | 59,236. | 44,071. | 44,041. | | |
| | | Accounts receivable ▶ | | | | | |
| | ľ | Less; allowance for doubtful accounts | | | | | |
| | 4 | Pledges receivable | | | | | |
| | 7 | Less; allowance for doubtful accounts | | | | | |
| | 5 | Grants receivable | | | · · · · · · · · · · · · · · · · · · · | | |
| | | Receivables due from officers, directors, trustees, and other | | | | | |
| | 0 | • | | | | | |
| | _ | disqualified persons | | | | | |
| | 7 | Other notes and loans receivable | | | | | |
| | | Less: allowance for doubtful accounts | | | | | |
| ets | 8 | Inventories for sale or use | | | | | |
| Assets | 9 | Prepaid expenses and deferred charges | 4 444 | | 400 450 | | |
| • | | Investments - U.S. and state government obligations STMT 6 | 655,211. | 660,407. | 699,150. | | |
| | b | Investments - corporate stock | | | | | |
| | c | Investments - corporate bonds | | | | | |
| | 11 | Investments - land, buildings, and equipment basis | | | | | |
| | | Less accumulated depreciation | | | | | |
| | 12 | Investments - mortgage loans | | | | | |
| | 13 | Investments - other | | | | | |
| | 14 | Land, buildings, and equipment: basis ► 2,229. Less accumulated depreciation STMT 7 ► 1,394. | | | | | |
| | | Less accumulated depreciation STMT 7 >1,394. | 1,281. | 835. | _835. | | |
| | 15 | Other assets (describe) | | | | | |
| | | , | | | | | |
| | 16 | Total assets (to be completed by all filers) | 715,728. | 722,198. | 760,911. | | |
| | - | Accounts payable and accrued expenses | | | | | |
| | 18 | Grants payable | | <u></u> | | | |
| w | 19 | Deferred revenue | | · · · · | | | |
| Liabilities | 1 | Loans from officers, directors, trustees, and other disqualified persons | | | | | |
| ٩ | 21 | · · · · · · · · · · · · · · · · · · | | | | | |
| <u>:</u> " | 1 | Other liabilities (describe >) | | | | | |
| | ** | Cutter Habilities (describe | | | | | |
| | 22 | Total liabilities (add lines 17 through 22) | 0. | 0. | | | |
| _ | 23 | Foundations that follow SFAS 117, check here | | | | | |
| | | | | | | | |
| es | | and complete lines 24 through 26 and lines 30 and 31. Unrestricted | | | | | |
| Š | 1 | | | | | | |
| Net Assets or Fund Balance | 25 | Temporarily restricted | | | | | |
| 9 | 26 | Permanently restricted | | | | | |
| Ş | | Foundations that do not follow SFAS 117, check here | |] | | | |
| 5 | | and complete lines 27 through 31. | | | | | |
| ş | 27 | Capital stock, trust principal, or current funds | 0. | 0. | | | |
| SSE | 28 | Paid-in or capital surplus, or land, bldg., and equipment fund | 0. | 0. | | | |
| ¥ | 29 | Retained earnings, accumulated income, endowment, or other funds | 715,728. | 722,198. | | | |
| ž | 30 | Total net assets or fund balances | 715,728. | 722,198. | | | |
| | | | | | | | |
| _ | 31 | Total liabilities and net assets/fund balances | 715,728. | 722,198. | | | |
| P | art | III Analysis of Changes in Net Assets or Fund Ba | alances | | | | |
| 1 | Tota | net assets or fund balances at beginning of year - Part II, column (a), line (| 30 | | | | |
| • | | st agree with end-of-year figure reported on prior year's return) | | | 715,728. | | |
| 2 | • | r amount from Part I, line 27a | | 2 | 6,470. | | |
| | | er increases not included in line 2 (itemize) | | 3 | 0. | | |
| | | lines 1, 2, and 3 | | | 722,198. | | |
| - | | reases not included in line 2 (itemize) | | 7 | 0. | | |
| | | I net assets or fund balances at end of year (line 4 minus line 5) - Part II. co | lumn (h) line 30 | | 722.198. | | |

ALFRED B SWANSON FOUNDATION

38-2695962

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| _ | | RED B SWANSON FO | | | | | | 38-2 | <u>695962</u> | Page 3 |
|------------|---|--|--|--------------------------------------|------------------------------|------------------------------------|-------|------------------------------------|--------------------------|---------------------|
| P | Part IV Capital Gains | and Losses for Tax on I | nvestment | Income | T | | | | | |
| | (a) List and desci 2-story brick wa | ribe the kind(s) of property sold (e. irehouse; or common stock, 200 st | g., real estate, ns. MLC Co.) | | (6) Ho P - D - | w acquired Purchase Donation | (0 |) Date acquire (mo., day, yr.) | d (d) Da (mo., d | te sold ay, yr.) |
| 1a | US TREASURY BO | NDS | | | | P | 0 | 5/27/9 | 9 02/0 | 5/08 |
| _ | US TREASURY BO | | | | <u> </u> | P | | <u>6/25/0</u> | | 7/08 |
| | US TREASURY BO | | | | <u> </u> | P | _ | <u>5/27/9</u> | | 4/08 |
| _ | US TREASURY NO | | | | <u> </u> | P | _ | 1/06/0 | | 8/08 |
| _е | US TREASURY NO | TES | <u>. </u> | | <u> </u> | P | 0 | 3/24/0 | | 8/08 |
| | (e) Gross sales price | (f) Depreciation allowed (or allowable) | | t or other basis xpense of sale | | | | (h) Gain or (l (e) plus (f) mir | | · |
| <u>a</u> | 20,954. | | | 17,71 | 4. | | | | | ,240. |
| <u>b</u> | | | | 11,00 | | | | | | ,344. |
| _ <u>c</u> | | <u> </u> | | 104,84 | | | | | | <u>,885.</u> |
| <u>d</u> | | | | 55,48 | 2. | | | | 1 | ,403. |
| _e | | | | 10,22 | 9. | | | | | <u>-655.</u> |
| | Complete only for assets showing | ng gain in column (h) and owned by | y the foundation | on 12/31/69 | | | | ains (Col. (h) | | |
| | (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | | cess of col. (1) col. (1), if any | | | | (), but not less Losses (from c | | |
| a | | | | | | | | | 3 | ,240. |
| ь | | | | | | | | | 2 | ,344. |
| | | | | | | | | | 5 | ,885. |
| d | | | | | | | | | 1 | ,403. |
| _e | <u> </u> | | | | | | | | | -655. |
| 2 | Capital gain net income or (net ca | If gain, also ent | | | $\left \cdot \right $ | 2 | _ | | 12 | ,217. |
| | | ss) as defined in sections 1222(5) a | | | 7 [| | | | | |
| 3 | If gain, also enter in Part I, line 8, | | and (o). | | 1 | | | | | |
| | If (loss), enter -0- in Part I, line 8 | | | | ß | 3 | | N | /A | |
| F | Part V Qualification U | Inder Section 4940(e) fo | r Reduced | Tax on Net | Inve | stment | Inco | me | | |
| (Fo | or optional use by domestic private | e foundations subject to the section | 1 4940(a) tax on | net investment ii | ncome. |) | | | | |
| | 4040419409 | | | | | , | | | | |
| IT S | section 4940(d)(2) applies, leave t | nis part diank. | | | | | | | | |
| Wa | as the foundation liable for the sec | tion 4942 tax on the distributable a | mount of any ye | ear in the base pe | riod? | | | | Yes | X No |
| | | lify under section 4940(e). Do not o | | • | | | | | | |
| | | each column for each year; see ins | | | es. | | | | | |
| | (a) | (b) | | · | (c) | | | | (d) istribution ratio | |
| | Base periód years Calendar year (or tax year beginni | Admotod analifiana di | istributions | Net value of no | onchari | able-use as | sets | (coł. (b |) divided by col | . (c)) |
| | 2007 | | 26,678. | | | 709,6 | 76. | <u> </u> | | 37592 |
| | 2006 | | 15,159. | | | 701,6 | | | | 21603 |
| _ | 2005 | | | | | | • • • | | | |
| | 2004 | | | - | • | | _ | | | |
| _ | 2003 | | | | | | | | | |
| _ | | | | | | | | | | |
| , | Total of line 1, column (d) | | | | | | | 2 | . 0 | 59195 |
| | | 5-year base period - divide the tota | I on line 2 by 5 | or by the number | r of vea | re | | | | <u> </u> |
| ٠ | the foundation has been in existe | - | oo 2 0 y 0, | or by the named | Oi you | | | 3 | . 0 | 29598 |
| | the foundation has been in existe | nee ii loss tilali o years | | | | | | | • | 27370 |
| | Enter the not value of noncharitat | ole-use assets for 2008 from Part X | / line F | | | | | | 721 | ,307. |
| 4 | Effet the net value of nonchanat | Die-use assets for 2000 from Part A | C, III E 5 | | | | | 4 | / 31 | , 307. |
| _ | At the base to a C | | | | | | | _ | 21 | C 4 E |
| 5 | Multiply line 4 by line 3 | | | | | | | 5 | | <u>,645.</u> |
| _ | | | | | | | | 1 . 1 | | 204 |
| 6 | Enter 1% of net investment incom | ne (1% of Part I, line 27b) | | | | | | 6 | | 321. |
| | | | | | | | | <u> </u> | | |
| 7 | Add lines 5 and 6 | | | | | | | 7 | 21 | <u>,966.</u> |
| | | | | | | | | | _ | |
| 8 | Enter qualifying distributions from | | | | | | | | 22 | <u>,988.</u> |
| | If line 8 is equal to or greater than See the Part VI instructions. | n line 7, check the box in Part VI, lir | ne 1b, and comp | olete that part usir | ng a 1% | tax rate. | | | | |

| _ | 1990-PF (2008) ALFRED B SWANSON FOUNDATION | | - | 4.5. | | 40.5 | | | | | <u>5962</u> | | Page 4 |
|------------|---|-------------|--------|--------|--------|-----------------|--------------|-----------|------|-------------|-------------|--------------|---|
| | art VI Excise Tax Based on Investment Income (Section 4940(a), | _ | _ | _ | | 1940 | (e), oı | <u>49</u> | 48 - | <u> 500</u> | instr | uctio | ns) |
| 1a | Exempt operating foundations described in section 4940(d)(2), check here and enter ** | | | | | |) | | | | | | |
| | Date of ruling letter: (attach copy of ruling letter if necessary-see in | _ | | | | | | - { | | | | | |
| b | Domestic foundations that meet the section 4940(e) requirements in Part V, check here | ة لكا | and | d en | ter 1 | % | þ | _ | 1 | | | 3 | 21. |
| | of Part I, line 27b | | | | | | i | 1 | | | | | |
| | All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Pa | | | | | ol. (b) | J | | | | | | _ |
| | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others | s ent | ter | -0-) |) | | | - | 2 | | | | <u>0.</u> |
| 3 | Add lines 1 and 2 | | | | | | | - | 3_ | | | 3 | 21. |
| 4 | Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others | s en | iter | r -0- |) | | | - | 4 | | | | 0. |
| | Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- | | | | | | | \vdash | 5 | | | 3 | 21. |
| | Credits/Payments: | . 1 | ı | | | | | | | | | | |
| | , , , , , , , , , , , , , , , , , , , | 3a | | | | | _ | | | | | | |
| | Exempt foreign organizations - tax withheld at source 6b | | | | | | | - | | | | | |
| | Tax paid with application for extension of time to file (Form 8868) | | - | | | | | \dashv | | | | | |
| | Backup withholding erroneously withheld 6d | 6d _ | L | | | | | | | | | | • |
| 7 | Total credits and payments. Add lines 6a through 6d | | | | | | | - | 7_ | | | | <u>0.</u> |
| 8 | Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached | d | | | | | | - | 8_ | | | | |
| 9 | Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | | | | | | | ▶ | 9_ | | | | 21. |
| 10 | Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | | | | | 1 | | ▶ ├ | 10 | | | | |
| | Enter the amount of line 10 to be: Credited to 2009 estimated tax | | | | | Ref | unded | <u> </u> | 11 | | | | |
| | art VII-A Statements Regarding Activities | | _ | | | | | | | | 1 | Voc | No |
| 1 a | During the tax year, did the foundation attempt to influence any national, state, or local legislation | on or | r di | id it | parti | ipate (| or interv | ene II | 1 | | <u> </u> | 1 85 | No |
| | any political campaign? | | | | | | | | | | 1a | | X |
| D | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (s | | | | | | | | | | 1b | + | X |
| | If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and cop | ppie: | s c | ot ar | ny m | atenai | s publis | snea | or | | | | |
| | distributed by the foundation in connection with the activities. | | | | | | | | | | | | |
| | Did the foundation file Form 1120-POL for this year? | | | | | | | | | | 1c | | X |
| a | Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: | | | | | | , | ` | | | 1 | 1 | } |
| _ | (1) On the foundation. > \$ (2) On foundation managers. > | _ | | | | · found | | <u>).</u> | | | | | |
| 8 | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure to managers. | lax | , IITI | ipos | eu oi | i iount | ation | | | | | | 1 |
| ٥ | - 1 | | | | | | | | | | | İ | x |
| Z | Has the foundation engaged in any activities that have not previously been reported to the IRS? | | | | | | | | | | 2 | | ├ ┻ |
| • | If "Yes," attach a detailed description of the activities. | | | | ممامہ | of inno | rnaratia | | | | - | | } |
| J | Has the foundation made any changes, not previously reported to the IRS, in its governing instruin bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes | ume | eni, | , aru | ICIES | DI IIICO | rpuratio | n, oi | | | 3 | | X |
| 40 | Did the foundation have unrelated business gross income of \$1,000 or more during the year? | | | | | | | | | | | | X |
| | of "Yes," has it filed a tax return on Form 990-T for this year? | | | | | | | | N | /A | 4a 4b | | <u>^ </u> |
| | Was there a liquidation, termination, dissolution, or substantial contraction during the year? | | | | | | | | 7.4 | <i>,</i> 12 | 5 | | x |
| • | If "Yes," attach the statement required by General Instruction T. | | | | | | | | | | <u> </u> | t — | |
| 6 | Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: | - | | | | | | | | | | | 1 |
| ٠ | By language in the governing instrument, or | • | | | | | | | | | - | | |
| | By state legislation that effectively amends the governing instrument so that no mandatory dire | rectio | ons | s tha | at coi | iflict w | ith the s | tate l | w | | | | |
| | remain in the governing instrument? | | | | | | | | ••• | | 6 | x | 1 |
| 7 | Did the foundation have at least \$5,000 in assets at any time during the year? | | | | | | | | | | 7 | X | |
| | If "Yes," complete Part II, col. (c), and Part XV. | | | | | | | | | | | | |
| 88 | Enter the states to which the foundation reports or with which it is registered (see instructions) | > | | | | | | | | | | | |
| | MI | - | _ | | | | | | | | | 1 | |
| ь | of the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorne | nev (| Gei | nera | ıl (or | desian | ate) | | | | | | |
| | of each state as required by General Instruction G? If "No," attach explanation | • | | | • | • | • | | | | 85 | X | |
| 9 | Is the foundation claiming status as a private operating foundation within the meaning of section | n 49 | 942 | 2(j)(3 | 3) or | 4942(i | (5) for (| calen | dar | | | | |
| | year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)? If "Yes," complete | | | | | ., | - | | | | 9 | <u>L</u> _ | <u>x</u> |
| 10 | Did any persons become substantial contributors during the tax year? if "Yes," attach a schedule listu | | | | | ad addr | PASSE | | | | 10 | | X |

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had not been removed from jeopardy before the first day of the tax year beginning in 2008?

| Form 990-PF (2008) ALFRED B SWANSON FOUNDAT | | | <u> 38-26959</u> | 62 | P: | age 6 |
|--|---|-----------------------------|--|--|-----------|--------------|
| Part VII-B Statements Regarding Activities for Which I | Form 4720 May Be F | Required (contin | ued) | | | |
| 5a During the year did the foundation pay or incur any amount to: | | | | ľ | | |
| (1) Carry on propaganda, or otherwise attempt to influence legislation (section | n 4945(e))? | Ye | 8 X No | 1 | | |
| (2) Influence the outcome of any specific public election (see section 4955); of | r to carry on, directly or indire | ectly, | | | | |
| any voter registration drive? | | Ye | s X No | | | |
| (3) Provide a grant to an individual for travel, study, or other similar purposes | ? | Ye | s X No | ļ | | |
| (4) Provide a grant to an organization other than a charitable, etc., organizatio | | | | ľ | | |
| 509(a)(1), (2), or (3), or section 4940(d)(2)? | | ☐ Ye | s X No | ŀ | | |
| (5) Provide for any purpose other than religious, charitable, scientific, literary, | or educational nurnoses, or t | | | - | - 1 | |
| the prevention of cruelty to children or animals? | or coocational purposco, or i | | s X No | - 1 | - 1 | |
| b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify unit | der the exceptions described i | | | | | |
| section 53.4945 or in a current notice regarding disaster assistance (see instru | · · | ii negulations | N/A | 5b | | |
| - · · · · · · · · · · · · · · · · · · · | • | | | 30 | | |
| Organizations relying on a current notice regarding disaster assistance check h | | | | | 1 | |
| c If the answer is "Yes" to question 5a(4), does the foundation claim exemption f | | | | - 1 | | |
| expenditure responsibility for the grant? | | I/A L Ye | s L No | | | |
| If "Yes," attach the statement required by Regulations section 53.494 | • • | | j | | | |
| 6a Did the foundation, during the year, receive any funds, directly or indirectly, to | pay premiums on | | | | | |
| a personal benefit contract? | | Ye | 8 X No | | | |
| b Did the foundation, during the year, pay premiums, directly or indirectly, on a p | personal benefit contract? | | 1 | <u>6b</u> | | <u> </u> |
| If you answered "Yes" to 6b, also file Form 8870. | | | \ | l | | |
| 7a At any time during the tax year, was the foundation a party to a prohibited tax s | shelter transaction? | Ye | s X No | | $oxed{}$ | |
| b If yes, did the foundation receive any proceeds or have any net income attribut | | | N/A | 7b_ | | |
| Part VIII Information About Officers, Directors, Trust | ees, Foundation Ma | magers, Highly | / | | | |
| - Faid Employees, and Contractors | | | | | | |
| 1 List all officers, directors, trustees, foundation managers and their | compensation. | | ··· | -, | | |
| () Name and address | (b) Title, and average hours per week devoted | (c) Compensation | (d) Contributions to employee benefit plans and deferred | | (e) Expe | ense |
| (a) Name and address | to position | (If not paid, enter -0-) | and deferred compensation | l a | allowan | |
| ALFRED B SWANSON, MD | PRESIDENT | | | | | |
| 2945 BONNELL AVE SE | | | | 1 | | |
| GRAND RAPIDS, MI 49506 | 1.00 | 0. | 0 | _ | | 0. |
| ************************************** | SECRETARY | | | 1 | | |
| 2945 BONNELL AVE SE | | | | ł | | |
| GRAND RAPIDS, MI 49506 | 40.00 | 0. | 0 | | | 0. |
| | | 1 | | 1 | | <u> </u> |
| | | | | 1 | | |
| | | | | - | | |
| | | | | +- | | —- |
| | | | | | | |
| | | | | | | |
| 2 Compensation of five highest-paid employees (other than those inc | luded on line 1) If none | enter "NONE " | | ــــــــــــــــــــــــــــــــــــــ | | |
| 2. Compensation of the inglicat-paid employees (other than those int | (b) Title, and average | enter NONE. | (d) Contributions to | T_{i} | (e) Expe | nse. |
| (a) Name and address of each employee paid more than \$50,000 | hours per week | (c) Compensation | employee benefit plans and deferred | ad | ccount, (| other |
| 1703779 | devoted to position | | compensation | +- | allowan | ces |
| NONE | | | | | | |
| | | | | — | | |
| | | | | | | |
| | | | | - | | |
| | | | | | | |
| | | | | ـــــ | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| Total number of other employees paid over \$50,000 | | | • | | | 0 |

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|--|---|------------------|
| Part VIII Information About Officers, Directors, Trustees, Foundate Paid Employees, and Contractors (continued) | tion Managers, Highly | |
| 3 Five highest-paid independent contractors for professional services. If none, enter | "NONE." | |
| (a) Name and address of each person paid more than \$50,000 | (b) Type of service | (c) Compensation |
| NONE | | |
| | | |
| | | |
| | | |
| Tabel number of others recovered over \$50,000 for professional convess | , J | _ > 0 |
| Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities | | |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statist number of organizations and other beneficiaries served, conferences convened, research papers prod | ical information such as the uced, etc. | Expenses |
| 1N/A | | |
| | | |
| 2 | | |
| | | |
| 3 | | |
| | | |
| 4 | | |
| Part IX-B Summary of Program-Related Investments | | |
| Describe the two largest program-related investments made by the foundation during the tax year on | lines 1 and 2. | Amount |
| 1 N/A | | |
| | | |
| 2 | | |
| All other program-related investments. See instructions. | | |
| | | |

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Total. Add lines 1 through 3

| P | art X , Minimum Investment Return (All domestic foundations must complete this part. Foreign four | ndations, se | e instructions.) |
|------------|--|------------------|------------------|
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: | | |
| 8 | Average monthly fair market value of securities | 1a | 682,348. |
| b | Average of monthly cash balances | 1b | 60,096. |
| C | Fair market value of all other assets | 1c | |
| d | Total (add lines 1a, b, and c) | 1d | 742,444. |
| 8 | 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 | 742,444. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 11,137. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 731,307. |
| 6 | Minimum investment return. Enter 5% of line 5 | 6 | 36,565. |
| P | art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here and do not complete this part.) | nd certain | |
| 1 | Minimum investment return from Part X, line 6 | 1 | 36,565. |
| 2 a | Tax on investment income for 2008 from Part VI, line 5 | | |
| b | Income tax for 2008. (This does not include the tax from Part VI.) | 1 | |
| C | Add lines 2a and 2b | 20 | 321. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 36,244. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 36,244. |
| 6 | Deduction from distributable amount (see instructions) | 6 | 0. |
| 7_ | Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | 7 | 36,244. |
| P | art 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 | 22,988. |
| b | Program-related investments - total from Part IX-B | 16 | 0. |
| 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 | 22,988. |
| 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 | 5 | 321. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 22,667. |
| | Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of | qualifies for th | |

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4940(e) reduction of tax in those years.

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, | 1 | | | |
| line 7 | | | ŧ. | 36,244. |
| 2 Undistributed income, if any, as of the end of 2007 | - 14 · · · | | , | |
| a Enter amount for 2007 only | Ž., | | 27,685. | |
| b Total for prior years: | | 0. | | |
| 3 Excess distributions carryover, if any, to 2008: | - | | • | |
| a From 2003 | - | | , | |
| b From 2004 | *** | | - | |
| c From 2005 | # 1 | , | • | |
| d From 2006 | | · | | |
| e From 2007 | = = = | 1 | | |
| f Total of lines 3a through e | 0. | • | , ' | .* · |
| 4 Qualifying distributions for 2008 from | · 4 | 1. | | |
| Part XII, line 4: ►\$ 22,988. | I_{1}^{3} | | | |
| a Applied to 2007, but not more than line 2a | ਵੰ • | ; | 22,988. | |
| b Applied to undistributed income of prior | , | | 227300. | |
| years (Election required - see instructions) | गृं | 0. | | |
| c Treated as distributions out of corpus | · · · · · · · · · · · · · · · · · · · | ī | | |
| (Election required - see instructions) | 0. | , | | |
| d Applied to 2008 distributable amount | | | , | 0. |
| e Remaining amount distributed out of corpus | 0. | | | 0. |
| 5 Excess distributions carryover applied to 2008 | 0. | | | 0. |
| (If an amount appears in column (d), the same amount must be shown in column (a).) | | | | |
| 6 Enter the net total of each column as indicated below: | • / | | | |
| & Corpus Add lines 3f, 4c, and 4e Subtract line 5 | 0. | | | |
| b Prior years' undistributed income. Subtract | * | | | |
| line 4b from line 2b | <u></u> | 0. | ı | |
| 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 instr. | · | | 4,697. | |
| f Undistributed income for 2008. Subtract | | | | |
| lines 4d and 5 from line 1. This amount must | | | | |
| be distributed in 2009 | | | | 36,244. |
| 7 Amounts treated as distributions out of | | | | |
| corpus to satisfy requirements imposed by | | | | |
| section 170(b)(1)(F) or 4942(g)(3) | | | | |
| 8 Excess distributions carryover from 2003 | | | | |
| not applied on line 5 or line 7 | 0. | | | |
| 9 Excess distributions carryover to 2009. | | į | | |
| Subtract lines 7 and 8 from line 6a | 0. | <u> </u> | | |
| 10 Analysis of line 9: | | | | |
| a Excess from 2004 | | | | |
| b Excess from 2005 | | Į. | | |
| c Excess from 2006 | | | 1 | |
| d Excess from 2007 | | | | |
| e Excess from 2008 | <u> </u> | | <u> </u> | 5 000 PF (000) |

| 1 at the foundation has received a ruling of eletrimiston 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 2 at Entire the lesser of the adjusted net income from Part 1 or the minimum investment return from Part X for each year instead 8 85% of line 2a countries from Part X to each year instead 4 Amounts included in line 2c not used directly for active conduct of exempt activities 6 and each year instead 4 Amounts included in line 2c not used directly for active conduct of exempt activities 6 and each year instead 6 Amounts included in line 2c not used directly for active conduct of exempt activities 8 used in the conduct of exempt activities 9 alternative list it relied upon: 4 Assets' afternative list it relied upon: 5 Assets (alternative list it relied upon: 5 Assets (alternative list it relied upon: 5 Assets (alternative list it relied upon: 5 Assets) afternative list it relied upon: 5 Assets (alternative list it relied upon: 5 Assets (alternative list it relied upon: 5 Assets) afternative list it relied upon: 5 Assets (alternative list it relied upon: 5 Assets (alternative list it relied upon: 5 Assets) afternative list it relied upon: 5 Assets (alternative list it relied upon: 5 Assets (alternative list it relied upon: 5 Assets (alternative list it relied upon: 5 Assets) afternative list it relied upon: 5 Assets (alternative list it relied upon: 5 Assets) afternative list. 6 Assets (alternative list it relied upon: 5 Assets (alternative list it relied upon: 5 Assets) afternative list. 6 Assets (alternative list it relied upon: 5 Assets (alternative list it relied upon: 5 Assets) afternative list. 6 Assets (alternative list. 6 Assets (alternative list. 6 Assets) afterna | | SWANSON F | | I-A guestion (1) | | -2695962 Page 10 |
|---|---|---------------------------|-----------------------------|--------------------------|-------------------------|-----------------------|
| foundation, and the ruling is effective for 2008, eight rise date of the nuling Check host not include whether the foundation is a priving operating foundation described in section 4942(i)(3) or 4942(i)(5) | <u></u> | · | | TA, question s) | N/A | |
| \$\$\text{\$\ | | | | | | |
| 2 a Enter the lesser of the adjusted net uncome from Part X for each year isoted (a) 2008 (b) 2007 (c) 2006 (d) 2005 (e) Total uncome from Part X for each year isoted 85% of line 2 (a) 2008 (b) 2007 (c) 2006 (d) 2005 (e) Total uncome from Part X for each year isoted 4 Amounts included in line 2c not used directly for active conduct of exempt activities 0 (usalifying distributions made directly for active conduct of exempt activities 2 (c) usalifying distributions made directly for active conduct of exempt activities 2 (c) usalifying distributions made directly for active conduct of exempt activities 2 (c) usualifying distributions made directly for active conduct of exempt activities 2 (c) usualifying distributions made directly for active conduct of exempt activities 2 (c) usualifying distributions made directly for active conduct of exempt activities 2 (c) usualifying distributions made directly for active conduct of exempt activities 2 (c) usualifying distributions made directly for active conduction of the state | • | • | <u> </u> | | 14040(3/2) == [| 4040(3)(5) |
| income from Part to the mammum (a) 2008 (b) 2007 (c) 2005 (d) 2005 (e) Total movestment return from Part X for each year listed b 85% aftine 2a Cousilying distributions from Part XII, lim 4 for each year listed d Amounts included in line 2c not used directly for active conduct of exempt activities and activities activities and activities activities and activities and activities and activities activities activities and activities activities and activities activities activities and activities activities and activities activities and activities activities activities activities and activities activiti | Г | | ng roundation described | | | 4942(J)(5) |
| mestment return from Part X for each year issted 85% of line 2 Cousilying distributions from Part XII, line 4 for each year listed 4 Amounts included in line 2c not used directly for active conduct of exempt activities Couplets St., for cito the adventure of the state of the conduct of exempt activities Subtract line 2 of from line 2c Complets St., for cit to the absence of the state of the conduct of exempt activities Subtract line 2 of from line 2c Complets St., for cit to the absence of the complete distribution of the state of the conduct of exempt activities Subtract line 2 of from line 2c Complets St., for cit to the absence of the complete distribution of the absence of the complete distribution of the absence of the complete distribution of the absence of the absence of the complete distribution of the absence of the absence of the absence of the complete distribution of the absence of the | ´ [| | (b) 2007 | | (4) 2005 | (a) Total |
| sech year listed b 85% of line 2a Coultilying distributions from Part XII, line 4 for each year listed d Amounts included in line 2 not used directly for active conduct of seems activities Qualifying distributions made directly for active conduct of seemst activities, Subtract lane 2 for mile not 2 Complete 8a, by or 6 for the alternative test relief upon: 4 "Assist' alternative test-enter; (1) Value of all assets (2) Value of all assets qualifying under section 4942(f)(3(f)(8)(f) D Endowment alternative test-enter 23 of minimum investment return shown in Part X, line 6 for cach year c "Support alternative test-enter (1) Total support other than gross whordwidths, rents, payments on securities loans (section \$12(a)(6)(s), or royalties) (2) Support from general public and so rine resempt section 4942(f)(5(f)(6)(in) (3) Logist amount of support from an exempt organization 1 Information Regarding Foundation Managers a List any managers of the foundation who have contributed more than \$5000. (See section \$70(a)(2).) SEE STATEMENT 8 2 Information Regarding 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 nonly mikes contributed more than \$5000. (See section \$70(a)(2).) SEE STATEMENT 8 2 Information Regarding Contribution, Orant, Clift, Loan, Scholarship, etc., Programs: Check here \mathbb{Z} If the foundation only mikes contribution is presented charitable organizations and does not accept unsolicited requests for funds. If the foundation Regarding Contribution, Orant, Clift, Loan, Scholarship, etc., Programs: Check here \mathbb{Z} If the foundation should be submitted and information and materials they should include: a Internation Regarding Contribution, Orant, Clift, Loan, Scholarship, etc., Programs: Check here \mathbb{Z} If the foundation should be submitted and information and materials they should include: b The form in which applications should be submitted and information and materials they should | | (a) 2000 | (0) 2007 | (6) 2000 | (0) 2003 | (8) 10181 |
| 8 85% of line 2c Oualitying distributions from Part XII, line 4 for each year listed d Amounts included in line 2c not used directly for active conduct of exampt activates Oualitying distributions made directly for active conduct of exampt activates Oualitying distributions made directly for active conduct of exampt activates Oualitying distributions made directly for active conduct of exampt activates Ouality of the Complete Sta, b, or o for the alternative test ender upon: 2 Complete Sta, b, or o for the alternative test ender (1) Yalus of assats qualitying under section 4942((NS)(B)(b) 5 Endowment alternative test ender 23 of minimum investment return shown in Part X, line 6 for each year listed 6 Support alternative test enter; (1) Total support other than gross envestment income (reflerest, dividends, crits, payments on 512(a)(5)), or royalties) (2) Support alternative test enter; (3) I argest amount of support from an axis of the form of the standard or the stand | | | | ļ | | |
| e Qualifying distributions from Part XII, Init 4 for each year ison conduct of a mounts included in line 2c not used directly for active conduct of exempt activities 4 Qualifying distributions made directly for active conduct of exempt activities. 5 Subtract line 2d from line 2c 5 alternative list relief upon: 4 Asself affairmative test - enter: (1) Yalue of all asserts: (2) Yalue of all asserts unalifying under section 442((X)(3)(8)) under | · · · · · · · · · · · · · · · · · · · | | - | <u> </u> | | |
| Inter 4 for each year latels d Arnounts included in line 2 c not used directly for active conduct of exampt activities d Qualitying distributions made directly for active conduct of exempt activities Countying distributions made directly for active conduct of exempt activities. Subtract time 2 d from him 2 c 3 Compiles 3a, b, or c for the attended the string of the state of | • | | - | | | |
| d Amounts notused in line 2c not used directly for active conduct of exampt activities 4 Qualitying distributions made directly for active conduct of exampt activities. Subtract line 2d from line 2c Complete 3d, b, cr for the alternative test relied upon: **Assist' afternative test relied: **(1) Yolue of all assests **Z3 of minimum investiment returns a source of the active and a stream of the active and a strea | · · · | | | | | |
| used directly for active conduct of exempt activities Outshipmy 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 - enter: (1) Value of assets qualifying under sexted reflect (2) Value of assets qualifying under sexted of 492(0)(3(B)(b) ▶ Endowment alternative test - enter: 23 of minimum investment return shown in Part X, line 6 for each year listed ○ Support alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(b), or royalties) (2) Support from general public and 5 or more exempt or general public and 5 or general public and | · | | | | | |
| exampt activities • Qualitying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2e • Complete 3d, b, or for the alternative lest - enter: (1) Value of all assets qualitying under section 942(n)(3(8)(0) under section 942(n)(3(8) | d Amounts included in line 2c not | | | | | |
| e Qualifying distributions made directly for active conduct of exempl activities. Subtract line 20 from line 2c 3 Complete 3a, b, or a for the attendance state relied upon: * Assist alternative lest - enter: (1) Yalve of all assets (2) Value of assets qualifying under section 4942(i)(3(B)(i)) * Endowment alternative test - enter: 23 of minimum investment return shown in Part X, line 6 for each year listed * Support alternative test - enter: (1) Total support other than gross investment income (interest, dividender, ents, payments on securities loans (section \$12(a)(b), or royalise); (2) Support from general public and 5 or more exempt organization (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 the instructions.) 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 the piece contributed more than \$3,000). (See section \$37(6)(2).) **SEE_STATEMENT 8** 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 or other entity) of which the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership or other entity) of which the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes grits, grants, etc. (see instructions) to individuals or organizations under other conditions, complete terms 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: | used directly for active conduct of | | | | | |
| tor active conduct of exempt activities. Subtact line 2d from line 2c Complete 5a, b, or of to the alternative itest reliarly open. (1) Value of all assets contenter. (1) Value of all assets sualitying under section 4942()(3)(8)(1) b Endowment afternative itest - enter 23 of minimum investment return shown in Part X, time 5 for each year listed. Support alternative test - enter; (1) Total support other than gross investment income (interest, dividends, rents, payments on securities bans (section 512(a)(5)), or royaltes) Support alternative test - enter; (1) Total support other than gross investment income (interest, dividends, rents, payments on securities bans (section 512(a)(5)), or royaltes) Support from general public and 5 or more exempt organizations as provided in section 4942(),(3)(6)(in) (3) Largest amount of support from an exempt organizations as provided in section 4942(),(3)(6)(in) 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 2% of the total contributions received by the foundation before the close of any tax year (but only if they 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 2% of the total contributions received by the foundation before the close of any tax year (but only if they 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 2% of the total contributions received by the foundation before the close of any tax year (but only if they 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 2% of the total contributions received by the foundation before th | ` <u> </u> | | | | | |
| Subtract line 2d from line 2c Compiler 3a, b, or 6 for the alternative test relied upon: a *Asset's alternative test - enter: (1) Value of all assets (2) Value of assets qualifying under section 4942()(3)(B)(i) b *Endowment' alternative test - enter: (2) 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)(6)), or royalties) (2) Support from general public and 6 or more exempt organizations as provided in section 4942(i)(3)(B)(ii) (3) Largest amount of support from a exempt organization as provided in section 4942(i)(3)(B)(ii) (3) Largest amount of support from a exempt organizations as provided in section 4942(i)(3)(B)(ii) 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 53,000). (See section 507(a)(2).) SEE STATEMENT 8 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 or other entity) of which the foundation has a 10% or greater interest. NONE Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here \[\sum_{\text{in}} \sum_{\text{in}} 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 terms 2a, b, c, and d. a The name, address, and telephone number of the person to whom applications should include: b The form in which applications should be submitted and information and materials they should include: | e Qualifying distributions made directly | | | | | |
| a Assets' alternative lest relied upon: a Assets' alternative lest relied upon: a Massets' alternative lest relied upon: b Endowment alternative lest - enter: (1) Yalus of assets outshiping under sestion 4942()(3)(B)(b) b Endowment alternative lest - enter ADAWM in Part X, line 6 for each year listed c Support alternative lest - enter: (1) Total support other than gross unsensiment income (interest, dividends, ents, payments on securities loans (section) 3 (2)(3), or royalties) (2) Support from general public and analytims as growted in section 4942()(3)(B)(ii) (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 the instructions.) 1 Information Regarding Foundation Managers: a List any managers of the foundation Managers: a List any managers of the foundation Managers: b 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 55,000). (See section 507(G)(2).) SEE STATEMENT 8 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, Girt, 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 girts, 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 include: b The form in which applications should be submitted and information and mater | for active conduct of exempt activities. | | | | | |
| alternative test relied upon: a 'Asset's alternative test - enter: (1) Value of assets qualifying under section 4942()(3)(B)(t) b 'Endowment' afternative test - enter: 2/3 of minimum investment return shown in Part X, line 6 for each year listed c 'Support' afternative test - enter; (1) Total support other than gross investment income (interest, dividends, ents, payments on securities loans (section 512(a)(5), or royalties) (2) Support from general public and 5 or more exempl organizations as provided in section 4942()(5)(6)(m) (3) Largest amount of support from an exempt organization as provided in esction 4942()(5)(6)(m) (3) Largest amount of support from an exempt organization as provided in a set on 4942()(5)(6)(m) 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 55,000). (See section 507(o)(2).) SEE STATEMENT 8 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 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here X 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: | | | | | | |
| a 'Assets' alternative test' - enter: (1) Value of assets qualifying under section 4942(I)(3)(B)(t) b 'Endowment' alternative test - enter 2/3 of minimum investment return shown in Part' X, line 6 for each year listed Support' alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royaltes) (2) Support from general public and 5 or more exempt organization as provided in section 4942(I)(3)(B)(III) (3) Largest amount of support from an exampt organization as provided in section 4942(I)(3)(B)(III) (3) Largest amount of support from an exampt organization (4) Gross investment income (interest, dividends) and some section 4942(I)(3)(B)(III) (3) Largest amount of support from an exampt 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 the instructions.) 1 Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than \$5,000), (See section 507(d)(2).) SEE STATEMENT 8 b List any managers of the foundation who have contributed more than \$5,000), (See section 507(d)(2).) SEE STATEMENT 8 b List any managers of the foundation who have contributed more than \$5,000 or example or the rentity) of which the foundation has a 10% or greater interest. NONIE 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here X 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 i | | | | | i | |
| (2) Value of assets qualifying under section 4942([)(3)(B)(t) 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(()(3)(8)(8)(8)) (3) Largest amount of support from an exempt organization (4) Gross investment income (interest at any time during the year-see 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).) SEE STATEMENT 8 b List any managers of the foundation who away 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 1 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here 3 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here 4 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: | | | | | | |
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| b The form in which applications should be submitted and information and materials they should include: c Any submission deadlines: | the foundation makes gifts, grants, etc. (| see instructions) to indi | viduals or organizations i | inder other conditions | s, complete items 2a, t | o, c, and d. |
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| | b The form in which applications should be | submitted and informa | ation and materials they s | hould include: | | |
| d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors: | c Any submission deadlines; | | _ | | . | |
| d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors: | | | | | | |
| | d Any restrictions or limitations on awards | , such as by geographic | al areas, charitable fields | , kinds of institutions, | or other factors: | |

Part XV Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient show any relationship to any foundation manager or substantial contributor Foundation Purpose of grant or **Amount** status of contribution Name and address (home or business) recipient a Paid during the year MARY FREE BED HOSPITAL, 235 WEALTHY, GRAND RAPIDS, MI 49503 NONE 501(C)(3) COMMUNITY WORK 2,948. BOY SCOUTS OF AMERICA, GERALD R. FORD COUNCIL, 3213 WALKER AVE NW, GRAND RAP NONE 501(C)(3) COMMUNITY YOUTH 1,000. 3,948. Total **▶** 3a **b** Approved for future payment NONE → 3b 0. Total

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

| Enter gross amounts unless otherwise indicated. | Unrelate | d business income | | led by section 512, 513, or 514 | (e) |
|---|-----------------|-------------------------|---------------|---------------------------------|---------------------------------------|
| cinor gross amount amount made maladas. | (a) Business | (b) | (C) Exclu- | (d) | Related or exempt |
| 1 Program service revenue: | code | Amount | sion | Amount | function income |
| a | | | | | |
| b | | | | | |
| C | | | | | |
| d | | | | | |
| 8 | | | | | |
| 1 | | | | | |
| g Fees and contracts from government agencies | | | | | |
| 2 Membership dues and assessments | | | | | |
| 3 Interest on savings and temporary cash | | | | | |
| investments | | | 14 | 367. | |
| 4 Dividends and interest from securities | | | 14 | 31,734. | |
| 5 Net rental income or (loss) from real estate: | | 2 2 2 | | 1 | |
| a Debt-financed property | | | | | |
| b Not debt-financed property | | | | | |
| 6 Net rental income or (loss) from personal | | | | | |
| property | | | | | |
| 7 Other investment income | | | | | |
| 8 Gain or (loss) from sales of assets other | | I | | | |
| than inventory | | | 18 | 12,217. | |
| 9 Net income or (loss) from special events | | | | | |
| 10 Gross profit or (loss) from sales of inventory | | | \vdash | | · |
| 11 Other revenue: | | | | | |
| 8 | <u> </u> | | | | |
| b | | | | | |
| d | | | + | | · |
| Δ | | | | | |
| 12 Subtotal. Add columns (b), (d), and (e) | | 0. | | 44,318. | 0. |
| 13 Total. Add line 12, columns (b), (d), and (e) | | | | 13 | |
| (See worksheet in line 13 instructions to verify calculations.) | | | | | |
| Part XVI-B Relationship of Activities t | o the Acco | omplishment of Ex | vemn | t Purnoses | |
| Trait XVI-B Troiduotiship of Activities (| | | veiiib | t Fui poses | |
| Line No. Explain below how each activity for which inco | | | ontrib | outed importantly to the accom | plishment of |
| the foundation's exempt purposes (other than | by providing fu | nds for such purposes). | | | |
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Form 990-PF (2008) ALFRED B SWANSON FOUNDATION 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of Part XVII Yes No

| the (| Code (other than section 501(c) | (3) organizations) or in section 52 | 7, relating to political organiza | ations? | - - - - |
|-----------------|--|---|--|--|--|
| a Tran | sfers from the reporting founda | ition to a noncharitable exempt org | ganization of: | | |
| (1) | Cash | | | | 1a(1) X |
| (2) | Other assets | | | | 1a(2) X |
| | r transactions: | | · | | * ** |
| • | Sales of assets to a noncharitat | ale exempt organization | | | 1b(1) X |
| | | | | • | 1b(2) X |
| | Purchases of assets from a nor | | | • | |
| ٠, | Rental of facilities, equipment, | or other assets | | | 1b(3) X |
| | Reimbursement arrangements | | | | 1b(4) X |
| (5) | Loans or loan guarantees | | | | 1b(5) X |
| (6) | Performance of services or me | mbership or fundraising solicitatio | ns | | 1b(6) X |
| c Shar | ring of facilities, equipment, mai | iling lists, other assets, or paid em | ployees | | 1c X |
| d If the | answer to any of the above is | "Yes," complete the following sche | dule. Column (b) should alwa | lys show the fair market value of the good | is, other assets, |
| | | | | in any transaction or sharing arrangemen | |
| | | other assets, or services received. | | | |
| Line no | T | (c) Name of noncharitable | exempt organization | (d) Description of transfers, transactions, | and sharing arrangements |
| <u> </u> | † ` ′ | N/A | - F - O | | |
| | + | N/A | | | · |
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| | | tly affiliated with, or related to, one | | ations described | |
| ın se | ection 501(c) of the Code (other | than section 501(c)(3)) or in sect | | ations described | Yes X No |
| ın se | ection 501(c) of the Code (other es," complete the following sch | r than section 501(c)(3)) or in sectedule. | oon 527? | | |
| ın se | ection 501(c) of the Code (other | r than section 501(c)(3)) or in sectedule. | | ations described (c) Description of relations | |
| ın se | ection 501(c) of the Code (other es," complete the following sch | r than section 501(c)(3)) or in sectedule. | oon 527? | | |
| ın se | ection 501(c) of the Code (other es," complete the following sche (a) Name of org | r than section 501(c)(3)) or in sectedule. | oon 527? | | |
| ın se | ection 501(c) of the Code (other es," complete the following sche (a) Name of org | r than section 501(c)(3)) or in sectedule. | oon 527? | | |
| ın se | ection 501(c) of the Code (other es," complete the following sche (a) Name of org | r than section 501(c)(3)) or in sectedule. | oon 527? | | |
| ın se | ection 501(c) of the Code (other es," complete the following sche (a) Name of org | r than section 501(c)(3)) or in sectedule. | oon 527? | | |
| in so | ection 501(c) of the Code (other es," complete the following sche (a) Name of org N/A | r than section 501(c)(3)) or in sect edule. anization | (b) Type of organization | (c) Description of relati | onship |
| b if "Y | ection 501(c) of the Code (other es," complete the following sche (a) Name of org N/A | r than section 501(c)(3)) or in sect edule. anization | (b) Type of organization | (c) Description of relation | onship |
| b if "Y | ection 501(c) of the Code (other es," complete the following sche (a) Name of org N/A | than section 501(c)(3)) or in sectedule. anization | (b) Type of organization mpanying schedules and statemer all information of which preparer h | (c) Description of relation | onship |
| In St | ection 501(c) of the Code (other es," complete the following sche (a) Name of org N/A Penalties of perjury, I declare that I homplete Declaration of preparer (other | than section 501(c)(3)) or in sectedule. anization | (b) Type of organization | (c) Description of relation (c) Description of relation (c) Description of relation (c) Description (c) Descri | onship |
| In Si | ection 501(c) of the Code (other es," complete the following sche (a) Name of org N/A | than section 501(c)(3)) or in sectedule. anization | (b) Type of organization mpanying schedules and statemer all information of which preparer h | (c) Description of relation | onship |
| In St. | ection 501(c) of the Code (other es," complete the following sche (a) Name of org N/A penalties of perjury, I declare that I homplete Declaration of preparer (other Signature of officer or trustee | than section 501(c)(3)) or in sectedule. anization | (b) Type of organization mpanying schedules and statemer all information of which preparer h | (c) Description of relations (c) Description (c) | onship |
| In St. | ection 501(c) of the Code (other es," complete the following sche (a) Name of org N/A penalties of perjury, I declare that I homplete Declaration of preparer (other Signature of officer or trustee | than section 501(c)(3)) or in sectedule. anization | mpanying schedules and statemental information of which preparer h | (c) Description of relations of | onship It is true, correct, |
| In St. | ection 501(c) of the Code (other es," complete the following sche (a) Name of org N/A penalties of perjury, I declare that I homplete Declaration of preparer (other Signature of officer or trustee | r than section 501(c)(3)) or in sectedule. anization ave examined this return, including according than taxpayer or fiduciary) is based on | mpanying schedules and statemental information of which prepare here. | (c) Description of relations of relations of relations of relations of relations of the best of my knowledge and belief, as any knowledge Title Check if self-employed Pre | onship It is true, correct, |
| In St. | ection 501(c) of the Code (other es," complete the following sche (a) Name of org N/A penalties of perjury, I declare that I homplete Declaration of preparer (other Signature of officer or trustee | than section 501(c)(3)) or in sectedule. anization ave examined this return, including according than taxpayer or fiduciary) is based on | mpanying schedules and statemer all information of which preparer h | (c) Description of relations of | onship It is true, correct, |
| Under and or | penalties of perjury, I declare that I homplete Declaration of preparer (other signature of officer or trustee Preparer's signature Firm's name (or yours PLAN if self-employed), 634 | ave examined this return, including according to than taxpayer or fiduciary) is based on TE & MORAN, PLL FRONT AVENUE NW | mpanying schedules and statemer all information of which preparer had been been been been been been been bee | (c) Description of relations of relations of relations of relations of relations of the best of my knowledge and belief, as any knowledge Title Check if self-employed EIN | onship It is true, correct, pparer's identifying number P00053850 |
| In School If "Y | ection 501(c) of the Code (other es," complete the following sche (a) Name of org N/A penalties of perjury, I declare that I homplete Declaration of preparer (other Signature of officer or trustee | ave examined this return, including according to than taxpayer or fiduciary) is based on TE & MORAN, PLL FRONT AVENUE NW | mpanying schedules and statemer all information of which preparer h | (c) Description of relations of relations of relations of relations of relations of the best of my knowledge and belief, as any knowledge Title Check if self-employed EIN | onship It is true, correct, |

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| | Ending Accumulated Depreciation | 1,394. | 1,394. | | | | | | | | |
|--------------------|--|-------------------------|--------------------------|-------------|-------------|-------------|---------------------------------------|---------------|-------------|---|-----|
| | Current Year Deduction | 446. | 446. | | - | . ' | , | • | -: | • | |
| | Current Sec 179 Expense | | | | | , | | | | | - |
| | Beginning Accumulated Depreciation | 948. | 948. | | | | ٠. | | | | |
| • | Basis For Depreciation | 2,229. | 2,229. | | -11 1, | £ 1 | · · · | , | | | |
| 1 | Reduction In Basis | | | | | • | : : : : : : : : : : : : : : : : : : : | | | | • |
| | Section 179 Expense | | | | | ···· | | : | | | · . |
| 990-PF | Bus Excl | | | | | | | · | <u> </u> | | Ÿ |
| | Unadjusted Cost Or Basis | 2,229. | 2,229. | | | | | | | | - |
| | 58 005> | MQ17 | | | | · · · · · · | | | | | |
| | Life | 5.00 | | | | 1 | | | | | |
| Ì | Method | TS. | | | | | · · | | | | |
| | Date Acquired | 12/26/05 | | | | | | | | | |
| FORM 990-PF PAGE 1 | Description | DELL PENTIUM INTEL D820 | * TOTAL 990-PF PG 1 DEPR | | | | | | | | |
| ORM 99 | Asset No | 77 | | | | | | | | | |
| E, L | 1 | | | | | | | | | | |

(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

| FORM 990-PF INTEREST ON SAVI | NGS AND TEM | PORARY CASH I | NVESTMENTS | STATEMENT 1 |
|-------------------------------|------------------------------|-----------------------------------|------------------------------|-------------------|
| SOURCE | | | | AMOUNT |
| AMERIPRISE | | | • | 367. |
| TOTAL TO FORM 990-PF, PART I, | LINE 3, CO | LUMN A | | 367. |
| FORM 990-PF DIVIDEND | S AND INTER | EST FROM SECU | JRITIES | STATEMENT 2 |
| SOURCE | GROSS | | PITAL GAINS DIVIDENDS | COLUMN (A) AMOUNT |
| AMERIPRISE | | 31,734. | 0. | 31,734. |
| TOTAL TO FM 990-PF, PART I, I | N 4 | 31,734. | 0. | 31,734. |
| FORM 990-PF | ACCOUNTI | NG FEES | | STATEMENT 3 |
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOM | |
| PLANTE MORAN | 5,525. | 3,315. | , | 0. |
| TO FORM 990-PF, PG 1, LN 16B | 5,525. | 3,315. | , | 0. |
| FORM 990-PF C | THER PROFES | SIONAL FEES | | STATEMENT 4 |
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOM | |
| AMERPRISE FINANCIAL | 7,594. | 7,594. | - | 0. |
| TO FORM 990-PF, PG 1, LN 16C | 7,594. | 7,594. | | 0. |

| FORM 990-PF | OTHER EXPENSES | | | STATEMENT 5 | | |
|---|------------------------------|-----------------------------|------|-------------------------------------|---|------------|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVE MENT INC | _ | (C) ADJUSTED NET INCOM | | |
| ANNUAL REPORT | 20 | | 0. | | | 20. |
| INSURANCE | 152 | | Ö. | | | 52. |
| IT SERVICES | 121 | | Ö. | | | 21. |
| POSTAGE AND SHIPPING - | | | | | | |
| PROGRAM MATERIALS | 115 | • | 0. | | 1: | 15. |
| TECHNOLOGY SUPPLIES | 200 | | 0. | | | 00. |
| TECHNOLOGY SERVICES | 4,370 | | 0. | | 4,3 | |
| SUPPLIES | 1,378 | | 0. | | 1,3 | |
| EQUIPMENT REPAIRS AND | _, _, | | | | -,0 | |
| MAINTENANCE | 497 | | 0. | | 4 | 97. |
| FAX AND INTERNET LINES | 456 | | Ö. | | | 56. |
| MANAGEMENT FEES | 12,950 | | 295. | | 11,6 | |
| VIDEO PRODUCTION | 76 | | 0. | | • | 76. |
| TO FORM 990-PF, PG 1, LN 23 | 20,335 | . 1, | 295. | | 19,0 | 40. |
| FORM 990-PF U.S. AND S | TATE/CITY | GOVERNMENT | OBL | IGATIONS | STATEMENT | |
| | TATE/CITY (U.) | S. OTHER | | IGATIONS | STATEMENT FAIR MARKE | |
| FORM 990-PF U.S. AND S DESCRIPTION US GOVERNMENT & AGENCY BONDS | U. | S. OTHER | | OK VALUE | FAIR MARKE VALUE | |
| DESCRIPTION US GOVERNMENT & AGENCY BONDS | GOV X | S. OTHER | | OK VALUE 660,407. | FAIR MARKE VALUE 699,1 | r 50. |
| DESCRIPTION | U. GOV X | OTHER GOV'T | | OK VALUE | FAIR MARKE VALUE | r 50. |
| DESCRIPTION US GOVERNMENT & AGENCY BONDS TOTAL U.S. GOVERNMENT OBLIGAT | GOV X TIONS TERNMENT OB: | OTHER GOV'T | | OK VALUE 660,407. | FAIR MARKE VALUE 699,1 | 50. |
| DESCRIPTION US GOVERNMENT & AGENCY BONDS TOTAL U.S. GOVERNMENT OBLIGAT TOTAL STATE AND MUNICIPAL GOV TOTAL TO FORM 990-PF, PART II | GOV X TIONS TERNMENT OB: | OTHER 'T GOV'T | BOO | 660,407. 660,407. | FAIR MARKE VALUE 699,1 | 50. |
| DESCRIPTION US GOVERNMENT & AGENCY BONDS TOTAL U.S. GOVERNMENT OBLIGAT TOTAL STATE AND MUNICIPAL GOV TOTAL TO FORM 990-PF, PART II FORM 990-PF DEPRECIATION OF | GOV X TIONS TERNMENT OB: | OTHER 'T GOV'T | BOO | 660,407. 660,407. | FAIR MARKE VALUE 699,1 699,1 | 50. 50. |
| DESCRIPTION US GOVERNMENT & AGENCY BONDS TOTAL U.S. GOVERNMENT OBLIGAT TOTAL STATE AND MUNICIPAL GOV TOTAL TO FORM 990-PF, PART II | GOV X TIONS TERNMENT OB: | OTHER THELD FOR | BOO | OK VALUE 660,407. 660,407. 660,407. | FAIR MARKE VALUE 699,1 699,1 STATEMENT BOOK VALUE | 50. 50. |

FORM 990-PF.

PART XV - LINE 1A LIST OF FOUNDATION MANAGERS STATEMENT

NAME OF MANAGER

ALFRED B SWANSON, MD GENEVIEVE DE GROOT SWANSON, MD