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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

2008

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 10-01-2008 and ending 09-30-2009

G

Check all that apply

☐ Initial return

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

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

Name of foundation
ROCKWELL AUTOMATION CHARITABLE CORP

Number and street (or P O box number if mail is not delivered to street address)
MI TRUST CO NA PO BOX 2977

Room/suite

City or town, state, and ZIP code
MILWAUKEE, WI 53201

A Employer identification number

48-1307009

B Telephone number (see the instructions)

(414) 815-3802

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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

☐ Section 4947(a)(1) nonexempt charitable trust

☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ☒ \$ 9,321,437

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 (attach schedule)	8,000,000			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	53,207	53,207		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a _____				
	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				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	8,053,207	53,207		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	500	500		
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	600			600
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see the instructions) . . .	9,990			
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	40,615			
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	51,705	500		600
	25 Contributions, gifts, grants paid	4,182,319			4,172,319
	26 Total expenses and disbursements. Add lines 24 and 25	4,234,024	500		4,172,919
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	3,819,183			
	b Net investment income (if negative, enter -0-)		52,707		
	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 (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	5,478,133	9,321,437	9,321,437
	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 schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	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 ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	5,478,133	9,321,437	9,321,437	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	5,478,133	9,321,437	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
30	Total net assets or fund balances (see the instructions)	5,478,133	9,321,437		
31	Total liabilities and net assets/fund balances (see the instructions)	5,478,133	9,321,437		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1	5,478,133
2	Enter amount from Part I, line 27a	2	3,819,183
3	Other increases not included in line 2 (itemize) ▶ _____	3	24,121
4	Add lines 1, 2, and 3	4	9,321,437
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	9,321,437

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a				
b				
c				
d				
e				
2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see the instructions) If (loss), enter -0- in Part I, line 8 }		3	

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 (col (b) divided by col (c))
2007	4,440,167	7,768,208	0 571582
2006	4,534,509	5,110,869	0 887229
2005	3,907,209	5,258,816	0 742983
2004	3,973,494	5,284,537	0 751910
2003	2,241,489	2,747,260	0 815900
2 Total of line 1, column (d).			2 3 769604
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 753921
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5.			4 3,950,058
5 Multiply line 4 by line 3.			5 2,978,032
6 Enter 1% of net investment income (1% of Part I, line 27b).			6 527
7 Add lines 5 and 6.			7 2,978,559
8 Enter qualifying distributions from Part XII, line 4.			8 4,172,919
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)							
1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		1	527				
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							
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		2	0				
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)							
3 Add lines 1 and 2.				3	527		
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)						4	527
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	527				
6 Credits/Payments							
a 2008 estimated tax payments and 2007 overpayment credited to 2008 6a				6,136			
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	6,136				
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					
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . 		10	5,609				
11 Enter the amount of line 10 to be Credited to 2009 estimated tax 		11	5,609				
		Refunded 					

Part VII-A Statements Regarding Activities				
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		1a	Yes	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?		1b		No
<i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>				
c Did the foundation file Form 1120-POL for this year?.		1c		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation  \$ _____ (2) On foundation managers  \$ _____				
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers  \$ _____				
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		2		No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		3		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?.		4a		No
b If "Yes," has it filed a tax return on Form 990-T for this year?.		4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		5		No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either <ul style="list-style-type: none">By language in the governing instrument, orBy state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		6	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>		7	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see the instructions)  WI _____				
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? <i>If "No," attach explanation .</i>		8b	Yes	
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)? <i>If "Yes," complete Part XIV</i>		9		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		10		No





















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 page 20 of the instructions)	11a		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Web site address  www.rockwellautomation.com/about_us/neighbor				
14	The books are in care of  M&I TRUST COMPANY Telephone no  (414) 287-7197			
	Located at  111 E KILBOURN AVE SUITE MILWAUKEE WI ZIP +4  53202			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here  			
	and enter the amount of tax-exempt interest received or accrued during the year  15			

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?  Yes  No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  Yes  No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  Yes  No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  Yes  No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  Yes  No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the 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).  Yes  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)?  	1b		No
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		No
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?  Yes  No			
	If "Yes," list the years  20____, 20____, 20____, 20____			
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		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here  20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  Yes  No			
b	If "Yes," did it have excess business holdings in 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2008.</i>)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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))?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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).		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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 the instructions)?		5b		
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?				
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?				
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b		No
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?				
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b		

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see the instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data TableSee Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see the instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII **Information About Officers and Contractors Continued**

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.	▶	0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.		Expenses
1		
2		
3		
4		

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See the instructions	
3	
Total Add lines 1 through 3.	

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	4,010,211
b	Average of monthly cash balances.	1b	0
c	Fair market value of all other assets (see the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	4,010,211
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	4,010,211
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see the instructions).	4	60,153
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,950,058
6	Minimum investment return. Enter 5% of line 5.	6	197,503

Part XI

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

1	Minimum investment return from Part X, line 6.	1	197,503
2a	Tax on investment income for 2008 from Part VI, line 5.	2a	527
b	Income tax for 2008 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	527
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	196,976
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	196,976
6	Deduction from distributable amount (see the instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	196,976

Part XII

Qualifying Distributions (see page 25 of the 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	4,172,919
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	4,172,919
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 page 26 of the instructions)	5	527
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	4,172,392

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

Part XIII

Undistributed Income (see page 26 of the instructions)

		(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1	Distributable amount for 2008 from Part XI, line 7				196,976
2	Undistributed income, if any, as of the end of 2007				
a	Enter amount for 2007 only.				
b	Total for prior years 20____, 20____, 20____				
3	Excess distributions carryover, if any, to 2008				
a	From 2003.				2,104,329
b	From 2004.				3,699,491
c	From 2005.				3,648,522
d	From 2006.				4,283,522
e	From 2007.				4,057,891
f	Total of lines 3a through e.	17,793,755			
4	Qualifying distributions for 2008 from Part XII, line 4 ▶ \$ 4,172,919				
a	Applied to 2007, but not more than line 2a				
b	Applied to undistributed income of prior years (Election required—see the instructions). . . .				
c	Treated as distributions out of corpus (Election required—see the instructions).				
d	Applied to 2008 distributable amount. . . .				196,976
e	Remaining amount distributed out of corpus	3,975,943			
5	Excess distributions carryover applied to 2008 (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:				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	21,769,698			
b	Prior years' undistributed income Subtract line 4b from line 2b.				
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.				
d	Subtract line 6c from line 6b Taxable amount—see the instructions.				
e	Undistributed income for 2006 Subtract line 4a from line 2a Taxable amount—see the instructions.				
f	Undistributed income for 2008 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2008.				0
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see the instructions).				
8	Excess distributions carryover from 2002 not applied on line 5 or line 7 (see page 27 of the instructions).	2,104,329			
9	Excess distributions carryover to 2008. Subtract lines 7 and 8 from line 6a.	19,665,369			
10	Analysis of line 9				
a	From 2004.				3,699,491
b	From 2005.				3,648,522
c	From 2006.				4,283,522
d	From 2007.				4,057,891
e	From 2008.				3,975,943

Part XIV

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

1a

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 organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

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

a

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

RA CHARITABLE CORP ADMINISTRATOR
1201 S SECOND ST
MILWAUKEE, WI 53204
(414) 382-2000

b

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

SEE ATTACHED STATEMENT

c

Any submission deadlines

SEE ATTACHED STATEMENT

d

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

SEE ATTACHED STATMENT

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
<div><div>a</div><div><i>Paid during the year</i></div><div>SEE ATTACHED STATEMENT</div><div>SEE ATTACHED STATEMENT</div><div>MILWAUKEE, WI 53201</div></div>		Public	Various	4,182,319
<div>Total</div>				<div>3a4,182,319</div>
<div><div>b</div><div><i>Approved for future payment</i></div></div>				
<div>Total</div>				<div>3b</div>

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) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
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					
4 Dividends and interest from securities.			14	53,207	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory.					
11 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e).				53,207	
13 Total. Add line 12, columns (b), (d), and (e). 13 _____					53,207

(See worksheet in line 13 instructions to verify calculations)

[illegible]

<p>1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?</p>		Yes	No
<p>a Transfers from the reporting organization to a noncharitable exempt organization of</p>			
<p>(1) Cash.</p>		1a(1)	No
<p>(2) Other assets.</p>		1a(2)	No
<p>b Other transactions</p>			
<p>(1) Sales of assets to a noncharitable exempt organization.</p>		1b(1)	No
<p>(2) Purchases of assets from a noncharitable exempt organization.</p>		1b(2)	No
<p>(3) Rental of facilities, equipment, or other assets.</p>		1b(3)	No
<p>(4) Reimbursement arrangements.</p>		1b(4)	No
<p>(5) Loans or loan guarantees.</p>		1b(5)	No
<p>(6) Performance of services or membership or fundraising solicitations.</p>		1b(6)	No
<p>c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.</p>		1c	No
<p>d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting organization. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.</p>			

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

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

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

***** 2010-02-05 *****

Signature of officer or trustee Date Title

Preparer's Signature MICHELLE WILLMS EA

Date


2010-02-05

Check if self-employed ☐

Preparer's SSN or
PTIN
(See **Signature** in
the
instructions)

Firm's name (or yours if self-employed), address, and ZIP code

M & I TRUST CO NA
11270 WEST PARK PLACE SUITE 400
MILWAUKEE, WI 53224

EIN 

Phone no (414) 815-3500

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 organization ROCKWELL AUTOMATION CHARITABLE CORP	Employer identification number 48-1307009
--	---

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	<input type="checkbox"/> 501(c)() (enter number) organization
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	<input type="checkbox"/> 527 political organization
Form 990-PF	<input checked="" type="checkbox"/> 501(c)(3) exempt private foundation
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation
	<input type="checkbox"/> 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 33¹/₃% 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)

Name of organization ROCKWELL AUTOMATION CHARITABLE CORP	Employer identification number 48-1307009
--	---

Part I

Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	ROCKWELL AUTOMATION 1201 S SECOND STREET MILWAUKEE, WI 53204 	\$ 8,000,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Name of organization ROCKWELL AUTOMATION CHARITABLE CORP	Employer identification number 48-1307009
---	--

Part II

Noncash Property (see Instructions)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
—	<div></div> <div></div> <div></div> <div></div>	\$ <div></div>	<div></div>
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
—	<div></div> <div></div> <div></div> <div></div>	\$ <div></div>	<div></div>
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
—	<div></div> <div></div> <div></div> <div></div>	\$ <div></div>	<div></div>
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
—	<div></div> <div></div> <div></div> <div></div>	\$ <div></div>	<div></div>
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
—	<div></div> <div></div> <div></div> <div></div>	\$ <div></div>	<div></div>
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
—	<div></div> <div></div> <div></div> <div></div>	\$ <div></div>	<div></div>

Name of organization ROCKWELL AUTOMATION CHARITABLE CORP	Employer identification number 48-1307009
---	--

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 columns (a) through (e) and the following line entry)

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

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

Additional Data

Software ID: 08000082

Software Version: US07CV000TY2008

EIN: 48-1307009

Name: ROCKWELL AUTOMATION CHARITABLE CORP

Form 990PF PartVIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(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
DM HAGERMAN	VP & Treasurer 1 00	0	0	0
ROCKWELL AUTOMATION 1201 S SECOND MILWAUKEE, WI 53202				
KD NOSBUSCH	BOARD CHAIRMAN 1 00	0	0	0
ROCKWELL AUTOMATION 1201 S SECOND MILWAUKEE, WI 53202				
M&I TRUST COMPANY NA	TRUSTEE 1 00	500	0	0
111 E KILBOURN AVE MILWAUKEE, WI 53202				
EM WALTER	BOARD SECRETARY 1 00	0	0	0
ROCKWELL AUTOMATION 1201 S SECOND MILWAUKEE, WI 53202				
S SCHMITT	VP 1 00	0	0	0
ROCKWELL AUTOMATION 1201 S SECOND MILWAUKEE, WI 53202				
T CRANDALL	VP 1 00	0	0	0
ROCKWELL AUTOMATION 1201 S SECOND MILWAUKEE, WI 53202				

TY 2008 Other Expenses Schedule**Name:** ROCKWELL AUTOMATION CHARITABLE CORP**EIN:** 48-1307009

Description	Revenue and Expenses per Books	Net Invest ment Income	Adjusted Net Income	Disbursements for Charitable Purposes
JK GROUP - ADMIN FEES FOR MATCHING GIFTS	12,224			
SMR Consulting	3,298			
MicroEdge Expense	21,326			
Guidestar	1,917			
Institute on Corp Citizenship	1,850			

TY 2008 Other Increases Schedule

Name: ROCKWELL AUTOMATION CHARITABLE CORP

EIN: 48-1307009

Description	Amount
CHANGE IN MONEY MARKET ACCRUAL	14,121
RETURNED CHECK - INSTITUTE EDUCADORES SEM FRONTEIRAS	10,000

TY 2008 Taxes Schedule

Name: ROCKWELL AUTOMATION CHARITABLE CORP

EIN: 48-1307009

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ESTIMATED PAYMENTS	6,136			
BALANCE DUE	3,854			

TRAN RHTI INVESTMENT REVIEW ACCOUNT TOTALS 07:48 12/17/09

BANK 98

ACCOUNT NO : ██████████ ROCKWELL AUTOMATION CHARITABLE CORP

ASSETS FROZEN DATE: 09/30/2009

INCOME CASH : 438,978.50

PRINCIPAL CASH: 438,978.50-

UNITS	COST/ CARRYING VALUE	MARKET VALUE	ACCUAL/ EST. ANN. INCOME
CASH EQUIVALENTS	9,321,437.37		945.89
9,321,437.370	9,321,437.37	9,321,437.37	28,395.80
FIXED INCOME	0.00		0.00
0.000	0.00	0.00	0.00
EQUITIES	0.00		0.00
0.000	0.00	0.00	0.00
OTHER	0.00		0.00
0.000	0.00	0.00	0.00
=====	=====	=====	=====
GRAND TOTAL	9,321,437.37		945.89
9,321,437.370	9,321,437.37	9,321,437.37	28,395.80

PRESS CLEAR FOR INVESTMT REVIEW MENU; ENTER 'TERM' TO SIGN OFF TRAN ==> RHTI

TRAN RHLL INVESTMENT REVIEW - HOLDINGS LIST 07:48 12/17/09
 BANK 98 ACCOUNT NO: ██████████ ROCKWELL AUTOMATION CHARITABLE CORP
 FROZEN DATE: 09/30/2009 TYPE: SECU DESC:
 SHOW STALE/MISSING PRICE:

INCOME :	438,978.50	UNITS	CARRYING VALUE
PRINCIPAL :	438,978.50-	ACCRUAL	TAX COST
MARKET PRICE	PRICE DATE	EST. ANN. INCOME	MARKET VALUE
999993447	1.0000000000 09/30/2009	9,321,437.370	9,321,437.37
MARSHALL PRIME MONEY MARKET CL I		945.89	9,321,437.37
		28,395.80	9,321,437.37

** END OF LIST **

PRESS CLEAR FOR INVESTMT REVIEW MENU; ENTER RHLP TO PRINT

TRAN ==> 001

Rockwell Automation Charitable Corp
c/o M&I Trust Company N A
P.O. Box 2977
Milwaukee, WI 53201

EIN 48-1307009
Tax Year: 10/01/2008-9/30/2009

Form 990-PF, Parts I & XV
Contributions, Gifts, and Grants Paid

<u>Organization Legal Name</u>	<u>Organization Address</u>	<u>Grant Amount</u>	<u>Program Area</u>
Advocates, Inc	P O Box 80166 Saukville, WI 53080	\$3,000 00	Health and Human Services
Alliance for the Great Lakes	17 N State Street, Suite 1390 Chicago, IL 60622	\$40,000 00	Education
Alverno College	3400 South 43 Street PO Box 343922 Milwaukee, WI 53234-3922	\$12,000 00	Education
American Indian Chamber of Commerce of Wisconsin, Inc	10809 W Lincoln Avenue, #102 West Allis, WI 53227	\$4,000 00	Education
American National Red Cross	2600 W Wisconsin Ave Milwaukee, WI 53233-2923	\$40,000 00	Health and Human Services
Betty Brinn Children's Museum	929 East Wisconsin Avenue, 2nd Floor Milwaukee, WI 53202	\$5,000 00	Education
Big Brothers Big Sisters of Metropolitan Milwaukee, Inc	788 N Jefferson St , Ste 600 Milwaukee, WI 53202-3739	\$35,000 00	Health and Human Services
Big Brothers Big Sisters of Ozaukee County, Inc	885 Badger Circle Grafton, WI 53024	\$1,000 00	Health and Human Services
Boy Scouts of America	Milwaukee County Council 330 S 84th Street Milwaukee, WI 53214-1468	\$15,000 00	Education
Boys & Girls Clubs of Greater Milwaukee, Inc	1558 N 6th Street Milwaukee, WI 53212	\$190,000 00	Education
Bradley Tech Construction Academy, Inc	700 South Fourth Street Milwaukee, WI 53204	\$25,000 00	Education
Bradley Technology and Trade School Foundation, Inc	10201 Innovation Dr , Suite 600 Milwaukee, WI 53226	\$30,000 00	Education
Case Western Reserve University	10900 Euclid Avenue Cleveland, OH 441067035	\$25,000 00	Education
City of Mequon	11333 N Cedarburg Road Mequon, WI 53092	\$10,000 00	Education
Cleveland Municipal School District	1380 East Sixth Street Cleveland, OH 44114	\$20,000 00	Education
Cleveland Museum of Art	11150 East Boulevard Cleveland, OH 44106-1711	\$5,000 00	Arts and Culture
Discovery World, Ltd	500 N Harbor Drive Milwaukee, WI 53202	\$10,532 00	Education
Discovery World, Ltd	500 N Harbor Drive Milwaukee, WI 53202	\$225,000 00	Education
Donors Forum of Wisconsin, Inc	759 N Milwaukee Street, Suite 515 Milwaukee, WI 53202	\$6,000 00	Civic and Community
Engineers & Scientists of Milwaukee, Inc	1300 West Canal Street, Suite 200 Milwaukee, WI 53233	\$42,000 00	Education
First Stage Milwaukee, Inc	325 W Walnut Street Milwaukee, WI 53212	\$12,500 00	Education
Florentine Opera Company, Inc	700 N Water Street, Suite 950 Milwaukee, WI 53202-4206	\$17,500 00	Education
Georgia Tech Foundation Inc	Atlanta, GA 30332	\$87,996 00	Education
Girl Scouts of Wisconsin Southeast, Inc	131 South 69th Street P O Box 14999 Milwaukee, WI 53214-0999	\$45,000 00	Education

Heart of Georgia United Way	215 W Jackson Street, Ste 3 Dublin, GA 31021	\$6,100 00 Health and Human Services
Heritage United Way, Inc	228 Maple Street, 4th Floor Manchester, NH 03103-5572	\$5,000 00 Health and Human Services
Hispanic Chamber of Commerce of Wisconsin, Inc	1021 West National Milwaukee, WI 53204	\$10,000 00 Civic and Community
Hispanic Professionals of Greater Milwaukee	PO Box 510545 Milwaukee, WI 53203	\$7,500 00 Civic and Community
IndependenceFirst, Inc	540 South 1st Street Milwaukee, WI 53204-1516	\$10,000 00 Health and Human Services
INROADS Great Lakes, Inc	633 W Wisconsin Ave, Ste 408 Milwaukee, WI 53203	\$20,000 00 Education
Wisconsin Instituto Educadores sem Fronteiras	Rua Capao Redondo 133, 2nd floor Sao Paulo 04932-050 Brazil	\$10,000 00 Education
Junior Achievement of Greater Cleveland, Inc	1422 Euclid Avenue, Suite 525 Cleveland, OH 44115	\$15,000 00 Education
Junior Achievement of Wisconsin, Inc	6924 N Port Washington Road Milwaukee, WI 53217	\$100,000 00 Education
Keep Greater Milwaukee Beautiful, Inc	1313 W Mount Vernon Avenue Milwaukee, WI 53233-2620	\$10,000 00 Education
Make A Difference - Wisconsin, Inc	710 N Plankinton Ave , Suite 310 Milwaukee, WI 53203	\$15,000 00 Education
Marquette University	P O Box 1881 Milwaukee, WI 53201-1881	\$5,000 00 Education
Mayfield Educational Excellence Foundation	211 Alpha Drive Highland Heights, OH 44143	\$6,500 00 Education
Milwaukee Art Museum, Inc	700 N Art Museum Drive Milwaukee, WI 53202	\$8,680 00 Education
Milwaukee Ballet Company, Inc	504 W National Avenue Milwaukee, WI 53204	\$15,000 00 Arts and Culture
Milwaukee Public Library Foundation, Inc	814 West Wisconsin Avenue Milwaukee, WI 53233	\$30,000 00 Education
Milwaukee Public Museum, Inc	800 West Wells Street Milwaukee, WI 53233-1478	\$20,000 00 Education
Milwaukee Repertory Theater	Patty & Jay Baker Theater Complex 108 East Wells Street Milwaukee, WI 53202	\$20,000 00 Education
Milwaukee School of Engineering	1025 N Broadway Street Milwaukee, WI 53202	\$72,562 00 Education
Milwaukee Symphony Orchestra, Inc	700 North Water Street Suite 700 Milwaukee, WI 53202-4239	\$125,000 00 Arts and Culture
Milwaukee Urban League	435 West North Avenue Milwaukee, WI 53212-3146	\$10,000 00 Education
MPTV Friends, Inc	Foundation Hall, 5th Floor 700 West State Street Milwaukee, WI 53233-1443	\$18,500 00 Education
Musical Arts Association	11001 Euclid Avenue Cleveland, OH 44106	\$5,000 00 Arts and Culture
National Merit Scholarship Corporation	1560 Sherman Avenue, Suite 200 Evanston, IL 60201-4897	\$19,250 00 Education
Next Door Foundation, Inc	Helwig Family Community Center 2545 North 29th Street Milwaukee, WI 53210	\$5,000 00 Education
PEARLS For Teen Girls Inc	2100 N Palmer Street Milwaukee, WI 53212	\$10,000 00 Education
Public Policy Forum, Inc	633 W Wisconsin Avenue, Suite 406 Milwaukee, WI 53203	\$10,000 00 Civic and Community
Researching Community Issues Richland County United Givers Fund, Inc	P O Box 228 Richland Center, WI 53581	\$5,250 00 Health and Human Services

S E T Ministry Inc	2977 N 50 ST Milwaukee, WI 53210	\$96,503 00 Education
School for Early Development and Achievement, Inc	2020 W Wells Street Milwaukee, WI 53233	\$10,000 00 Education
SHARP Literacy, Inc	750 N Lincoln Memorial Drive, Suite 311 Milwaukee, WI 53202-4018	\$48,000 00 Education
Sixteenth Street Community Health Center	1337 S Cesar E Chavez Dr. Milwaukee, WI 53204-2203	\$5,000 00 Health and Human Services
Skylight Opera Theatre Corp	158 N Broadway Milwaukee, WI 53202	\$7,500 00 Education
Society of Women Engineers	120 South LaSalle Street, Suite 1515 Chicago, IL 60603	\$13,500 00 Education
The Student Conservation Association, Inc	689 River Road Charlestown, NH 03603-0550	\$7,500 00 Education
UWM Foundation	Alumni House 3230 East Kenwood Blvd Milwaukee, WI 53211	\$200,000 00 Education
UWM Foundation	Alumni House 3230 East Kenwood Blvd Milwaukee, WI 53211	\$31,250 00 Education
United Community Center, Inc	1028 S 9th Street Milwaukee, WI 53204-1395	\$20,000 00 Education
United Performing Arts Fund, Inc	929 N Water Street Milwaukee, WI 53202	\$11,824 00 Arts and Culture
United Performing Arts Fund, Inc	929 N Water Street Milwaukee, WI 53202	\$210,000 00 Arts and Culture
United Way of Champaign County Illinois Inc	404 W Church St Champaign, IL 61820	\$4,500 00 Health and Human Services
United Way of Greater Cleveland	1131 Euclid Avenue Cleveland, OH 44115	\$315,000 00 Health and Human Services
United Way of Greater Milwaukee, Inc	225 W Vine Street Milwaukee, WI 53212	\$634,000 00 Health and Human Services
United Way of Greater Milwaukee, Inc	225 W Vine Street Milwaukee, WI 53212	\$100,000 00 Health and Human Services
United Way of Massachusetts Bay and Merrimack Valley	51 Sleeper Street Boston, MA 02210-1208	\$3,200 00 Health and Human Services
United Way of Summit County	P O Box 1260 Akron, OH 44309	\$13,500 00 Health and Human Services
United Way of the Texas Gulf Coast	50 Waugh Drive Houston, Texas 77007	\$1,515 00 Health and Human Services
University of Wisconsin Foundation	1848 University Avenue P O Box 8860 Madison, WI 53708-8860	\$67,288 00 Education
US Foundation for the Inspiration & Recognition of Science & Technology	200 Bedford St Manchester, NH 03101	\$450,000 00 Education
US Space & Rocket Center Foundation	1 Tranquility Base Huntsville, AL 35805-3399	\$3,769 00 Education
Wisconsin Council on Economic Education, Inc	7635 W Bluemound Rd , Ste 106 Milwaukee, WI 53213	\$3,500 00 Education
YMCA of Metropolitan Milwaukee, Inc	161 West Wisconsin Avenue, Suite 4000 Milwaukee, WI 53203-2601	\$5,000 00 Education
Matching Gifts		\$419,099 50
		\$4,182,318.50

990 PF, PART XV – 2(b),(c), and (d)

SEE ROCKWELL AUTOMATION CHARITABLE CORP
GUIDELINES STATEMENT AND GRANT APPLICATION

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