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**Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation****2009**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 2009, or tax year beginning , **2009, and ending** ,

G Check all that apply: ☐ Initial return ☐ Initial Return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Brotherhood Mutual Foundation, Inc. 6400 Brotherhood Way Fort Wayne, IN 46825-4235		A Employer identification number 20-3618117
			B Telephone number (see the instructions) (260) 482-8668
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		C If exemption application is pending, check here ☐	
I Fair market value of all assets at end of year (from Part II, column (c), line 16) \$ 59,818.		D 1 Foreign organizations, check here ☐ 2 Foreign organizations meeting the 85% test, check here and attach computation ☐	
J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)		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 ☐	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
REVENUE	1 Contributions, gifts, grants, etc., received (att sch)	308,201.			
	2 Ck ☐ if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments	150.	150.		
	4 Dividends and interest from securities				
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10	-3,446.			
	b Gross sales price for all assets on line 6a	305,259.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain			0.	
	9 Income modifications				
ADMINISTRATIVE AND OPERATING EXPENSES	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit/(loss) (att sch)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	304,905.	150.	0.	
	13 Compensation of officers, directors, trustees, etc	0.			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach sch)				
	c Other prof fees (attach sch)				
17 Interest					
18 Taxes (attach schedule)(see instr)	See Stmt 1	98.			
19 Depreciation (attach sch) and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses (attach schedule)	See Statement 2	183.			
24 Total operating and administrative expenses. Add lines 13 through 23		281.			
25 Contributions, gifts, grants paid Part XV		298,708.			
26 Total expenses and disbursements. Add lines 24 and 25		298,989.	0.	0.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		5,916.			
b Net investment income (if negative, enter -0-)			150.		
c Adjusted net income (if negative, enter -0-)				0.	

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Part II Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
ASSETS	1 Cash — non-interest-bearing	5,571.	2,082.	2,082.
	2 Savings and temporary cash investments	48,331.	57,736.	57,736.
	3 Accounts receivable			
	Less: allowance for doubtful accounts			
	4 Pledges receivable			
	Less: allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7 Other notes and loans receivable (attach sch)			
	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 instructions. Also, see page 1, item I)	53,902.	59,818.	59,818.	
LIABILITIES	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
NET ASSETS OR FUND BALANCES	Foundations that follow SFAS 117, check here 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 and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	53,902.	59,818.	
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see the instructions)	53,902.	59,818.	
	31 Total liabilities and net assets/fund balances (see the instructions)	53,902.	59,818.	

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	53,902.
2 Enter amount from Part I, line 27a	2	5,916.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	59,818.
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	59,818.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a 2,600 Pepsico		D	1/23/09	1/28/09
b 710 Exxon Mobil Corp		D	6/19/09	6/24/09
c 924 United Technologies Corporation		D	6/19/09	6/24/09
d 1860 Broadridge Financial Solutions, Inc.		D	9/03/09	9/09/09
e 2000 Western Union Co.		D	9/03/09	9/09/09

(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 128,832.		131,821.	-2,989.
b 50,376.		50,490.	-114.
c 50,057.		50,138.	-81.
d 39,514.		39,656.	-142.
e 36,480.		36,600.	-120.

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

(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
a			-2,989.
b			-114.
c			-81.
d			-142.
e			-120.

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	-3,446.
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	-3,446.

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

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

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

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

☐ Yes☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2008	383,067.	165,263.	2.317924
2007	281,339.	139,121.	2.022261
2006	269,176.	162,194.	1.659593
2005			
2004			

2 Total of line 1, column (d)	2	5.999778
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	1.499945
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	81,408.
5 Multiply line 4 by line 3	5	122,108.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2.
7 Add lines 5 and 6	7	122,110.
8 Enter qualifying distributions from Part XII, line 4	8	298,708.

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

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

1 a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter 'N/A' on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary - see instr.)		1	2.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)		3	2.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
3 Add lines 1 and 2		5	2.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2009 estimated tax pmts and 2008 overpayment credited to 2009	6a		
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		0.
8 Enter any penalty for underpayment of estimated tax Check here ☐ 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		2.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ☐ Refunded ☐	11		

Part VII-A Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities.</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions). IN		
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>	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses.</i>		X

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Part VII-A Statements Regarding Activities Continued

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>Matthew G. Hirschy, Treasurer</u> Telephone no. <u>(260) 482-8668</u> Located at <u>6400 Brotherhood Way Fort Wayne IN</u> ZIP + 4 <u>46825-4235</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>	<u>N/A</u>		

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)? Organizations relying on a current notice regarding disaster assistance check here ☐	1b	N/A
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? ☐ Yes ☒ No If 'Yes,' list the years <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see the instructions.)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b If 'Yes,' did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)	3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

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Form 990-PF (2009)

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b N/A

Organizations relying on a current notice regarding disaster assistance check here

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

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

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

6b X

If 'Yes' to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b N/A

Part 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 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
James A. Blum 6400 Brotherhood Way Fort Wayne, IN 46825	Chairman 0	0.	0.	0.
Mark A. Robison 6400 Brotherhood Way Fort Wayne, IN 46825	President 0	0.	0.	0.
Hugh White 6400 Brotherhood Way Fort Wayne, IN 46825	Vice Preside 0	0.	0.	0.
Matthew G. Hirschy 6400 Brotherhood Way Fort Wayne, IN 46825	Treasurer 0	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1— see instructions). If none, enter 'NONE.'

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

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

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	10,967.
b	Average of monthly cash balances	1b	71,681.
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	82,648.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	82,648.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	1,240.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	81,408.
6	Minimum investment return. Enter 5% of line 5	6	4,070.

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

1	Minimum investment return from Part X, line 6	1	4,070.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	2.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	2.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	4,068.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	4,068.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	4,068.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1a	298,708.
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	298,708.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	2.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	298,706.

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 instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				4,068.
2 Undistributed income, if any, as of the end of 2009:				
a Enter amount for 2008 only			0.	
b Total for prior years. 20____, 20____, 20____		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006	261,217.			
d From 2007	274,448.			
e From 2008	375,000.			
f Total of lines 3a through e	910,665.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 298,708.				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2009 distributable amount				4,068.
e Remaining amount distributed out of corpus	294,640.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	1,205,305.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount — see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	1,205,305.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006	261,217.			
c Excess from 2007	274,448.			
d Excess from 2008	375,000.			
e Excess from 2009	294,640.			

N/A

- (4) Gross investment income**

[illegible]

d Any restrictions or limitations on awards, such as by geographical 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**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year Various - See Attachment ,		Exempt		298,708.
Total			3a	298,708.
b Approved for future payment Various - See Attachment ,		Exempt		60,650.
Total			3b	60,650.

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, or 990-PF**

OMB No 1545-0047

2009

Name of the organization

Brotherhood Mutual Foundation, Inc.

Employer identification number

20-3618117

Organization type (check one):

Filers of:

Form 990 or 990-EZ

Section:

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

Form 990-PF

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

Check if your organization is covered by the **General Rule** or a **Special Rule**

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

General Rule —

- ☒ For an organization 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 990-EZ, that met the 33-1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ, that received from any one contributor, during the year, aggregate contributions 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 990-EZ, that received from any one contributor, during the year, 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: An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF) but it **must** answer 'No' on Part IV, line 2 of their Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

BAA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization

Employer identification number

Brotherhood Mutual Foundation, Inc.

20-3618117

Part I Contributors (see instructions.)

(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Brotherhood Mutual Insurance 6400 Brotherhood Way Fort Wayne, IN 46825	\$ 131,612.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution.)
2	Brotherhood Mutual Insurance 6400 Brotherhod Way Fort Wayne, IN 46825	\$ 100,526.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution.)
3	Brotherhood Mutual Insurance 6400 Brotherhood Way Fort Wayne, IN 46825	\$ 76,063.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

Employer identification number

20-3618117

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	2,600 shares PepsiCo, Inc.		
		\$ 131,612.	1/23/09
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
2	710 shares Exxon Mobile and 924 shares United Technologies Corporation		
		\$ 100,526.	6/19/09
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
3	1,860 shares Broadridge Financial Solutions, Inc and 2,000 shares Western Union Co.		
		\$ 76,063.	9/03/09
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization

Brotherhood Mutual Foundation, Inc.

Employer identification number

20-3618117

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

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

► \$ N/A

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

BAA

2009

Federal Statements

Page 1

Client BMF

Brotherhood Mutual Foundation, Inc.

20-3618117

5/12/10

09:44AM

Statement 1
Form 990-PF, Part I, Line 18
Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Total	\$ 98.	\$ 0.	\$ 0.	\$ 0.

Statement 2
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Bank Fees	\$ 183.			
Total	\$ 183.	\$ 0.	\$ 0.	\$ 0.

Brotherhood Mutual Foundation, Inc.

EIN: 20-3618117

Part VIII Continuation

a. Name and Address	b. Title	c. Compensation	d. Contributions	e. Expense acct
Michael J. Allison 6400 Brotherhood Way Fort Wayne, IN 46825	Secretary	0	0	0

Part XV-3a Attachment
Grants and Contributions Paid
January 1, 2009 to December 31, 2009

Name	Street	City	State	Zip Code	Foundation Status of Recipient	Purpose of grant or contribution	Amount
A Hope Center	3630 Hobson Road	Fort Wayne	IN	46815	Exempt Public Charity	General Support*	4,000.00
A Hope Center	3030 Lake Avenue Ste 20	Fort Wayne	IN	46805	Exempt Public Charity	Sinides of Hope Walk	2,000.00
Advance Amenca	101 W Ohio Street, Ste 660	Indianapolis	IN	46204	Exempt Public Charity	General Support*	5,500.00
AFA of Indiana	P O Box 40307	Indianapolis	IN	46240	Exempt Public Charity	General Support*	2,000.00
Allen County 4-H Clubs Inc	4001 Crescent Ave	Fort Wayne	IN	46815	Exempt Public Charity	General Support*	500.00
Allen County Jail Chaplaincy	417 S Calhoun Street	Fort Wayne	IN	46802	Exempt Public Charity	General Support*	1,000.00
American Family Assn of Indiana	PO Box 26208	Indianapolis	IN	46226	Exempt Public Charity	General Support*	5,500.00
American Red Cross	PO Box 5025	Fort Wayne	IN	46895	Exempt Public Charity	Capital Campaign	3,500.00
ARC - Easter Seals	4919 Coldwater Road	Fort Wayne	IN	46825	Exempt Public Charity	General Support*	1,000.00
Bethel College	1001 West McKinley Avenue	Mishawaka	IN	46545	Exempt School	General Support*	2,000.00
Bethel College	1001 West McKinley Avenue	Mishawaka	IN	46545	Exempt School	Capital Campaign	5,000.00
Blackhawk Christian School	1001 W McKinley Avenue	Mishawaka	IN	46545	Exempt School	General Support*	2,500.00
Boy Scouts of America	7400 E State Blvd	Fort Wayne	IN	46815	Exempt School	Costa Rica Mission Trip	2,250.00
Campus Crusade for Chnst	8315 West Jefferson Blvd	Fort Wayne	IN	46804	Exempt Public Charity	General Support*	2,000.00
Campus Crusade for Chnst	3900 N Lancaster Dr	Muncie	IN	47304	Exempt Public Charity	Wildwood Summer Project	750.00
CBMC	PO Box 628222	Orlando	FL	32862	Exempt Public Charity	Jesus Film Project	1,250.00
CBMC	7114 Piegan Place	Fort Wayne	IN	46815	Exempt Public Charity	General Support*	600.00
CBMC of Fort Wayne	7114 Piegan Place	Fort Wayne	IN	46815	Exempt Public Charity	General Support*	600.00
CBMC Rescue Ministres	7114 Piegan Place	Fort Wayne	IN	46815	Exempt Public Charity	General Support*	600.00
Chans House	7114 Piegan Pl	Fort Wayne	IN	46802	Exempt Public Charity	General Support*	25,000.00
Child Evangelism Fellowship	533 West Washington Blvd	Fort Wayne	IN	46802	Exempt Public Charity	General Support*	1,000.00
Child Evangelism Fellowship	PO Box 348	Warrenton	MO	63383-03	Exempt - Religious Organizati	General Support*	750.00
Chnstian Literature for Africa	4646 W Jefferson, Ste 280	Fort Wayne	IN	46804	Exempt - Religious Organizati	General Support*	500.00
Christian Motorcycles Association	PO Box 5524	Fort Wayne	IN	46895	Exempt Public Charity	General Support*	500.00
Embassy Theatre Foundation	PO Box 9, 4278 Hwy 71 South	Hatfield	AR	71945	Exempt Public Charity	General Support*	1,000.00
Fellowship of Chnstian Athletes	125 West Jefferson Blvd	Fort Wayne	IN	46802	Exempt Public Charity	General Support*	1,000.00
Fellowship of Chnstian Athletes	576 Geiger Drive, Ste B	Roanoke	IN	46783	Exempt Public Charity	General Support*	1,000.00
Fort Wayne Area YFC - Vitality Care	576 Geiger Drive, Ste B	Roanoke	IN	46783	Exempt Public Charity	General Support*	2,080.00
Fort Wayne Area YFC - Vitality Care	2825 Hillegas Road	Fort Wayne	IN	46808	Exempt Public Charity	General Support*	2,080.00
Fort Wayne Area YFC - Vitality Care	2825 Hillegas Road	Fort Wayne	IN	46808	Exempt Public Charity	General Support*	2,080.00
Fort Wayne Area YFC - Vitality Care	2825 Hillegas Road	Fort Wayne	IN	46808	Exempt Public Charity	General Support*	2,080.00
Fort Wayne Area YFC - Vitality Care	2825 Hillegas Road	Fort Wayne	IN	46808	Exempt Public Charity	General Support*	2,080.00
Fort Wayne Area YFC - Vitality Care	2825 Hillegas Road	Fort Wayne	IN	46808	Exempt Public Charity	General Support*	2,080.00
Fort Wayne Area YFC - Vitality Care	2825 Hillegas Road	Fort Wayne	IN	46808	Exempt Public Charity	General Support*	2,080.00
Fort Wayne Area YFC - Vitality Care	2825 Hillegas Road	Fort Wayne	IN	46808	Exempt Public Charity	General Support*	2,080.00
Fort Wayne Area YFC - Vitality Care	2825 Hillegas Road	Fort Wayne	IN	46808	Exempt Public Charity	General Support*	2,080.00
Fort Wayne Area YFC - Vitality Care	2825 Hillegas Road	Fort Wayne	IN	46808	Exempt Public Charity	General Support*	2,080.00
Fort Wayne Philharmonic	4901 Fuller Drive	Fort Wayne	IN	46835	Exempt Public Charity	General Support*	1,000.00
International House, Inc	711 E Washington Center Rd	Fort Wayne	IN	46825	Exempt Public Charity	General Support*	2,500.00
Junior Achievement Inc	601 Noble Drive	Fort Wayne	IN	46805	Exempt Public Charity	General Support*	1,000.00
Keystone Schools	1800 Levernre Street	Fort Wayne	IN	46805	Exempt School	General Support*	5,000.00
Lakewood Park Chnstian School	5555 CR 29 South	Auburn	IN	46706	Exempt Public Charity	General Support*	1,000.00

Part XV-3a Attachment
Grants and Contributions Paid
January 1, 2009 to December 31, 2009

Name	Street	City	State	Zip Code	Foundation Status of Recipient	Purpose of grant or contribution	Amount
Lifeline Youth & Family Services	P O Box 10328	Fort Wayne	IN	46851	Exempt Public Charity	General Support*	4,000 00
Love Community Center	1148 Kinnard Avenue	Fort Wayne	IN	46807	Exempt Public Charity	General Support*	1,000 00
Matthew 25 Health & Dental Clinic	413 East Jefferson Blvd	Fort Wayne	IN	46802	Exempt Public Charity	General Support*	5,000 00
Matthew 25 Health & Dental Clinic	413 East Jefferson Blvd	Fort Wayne	IN	46802	Exempt Public Charity	General Support*	2,500 00
Men's Ministry Network	P O Box 25004	Chattanooga	TN	37422	Exempt Public Charity	General Support*	1,500 00
Mentoring Moms, Inc	3212 Indiana Avenue	Fort Wayne	IN	46807	Exempt Public Charity	General Support*	1,000 00
Moody Bible Institute	820 N LaSalle Blvd	Chicago	IL	60610	Exempt School	General Support*	750 00
National Alliance for Insurance Education & Rese	3630 North Hills Drive	Austin	TX	78731	Exempt Public Charity	General Support*	1,000 00
Neighborhood Christian Legal Clinic	2826 South Calhoun Street	Fort Wayne	IN	46807	Exempt Public Charity	General Support*	500 00
Northrop High School	7001 Coldwater Rd	Fort Wayne	IN	46825	Exempt School	Inauguration Day Trip	500 00
Pathway Community Church	11623 Coldwater Road, Ste 101	Fort Wayne	IN	46845	Exempt Church	Mission Trip	750 00
Pathway Community Church	11623 Coldwater Road, Ste 101	Fort Wayne	IN	46845	Exempt Church	Mission Trip	750 00
Pure Fashion	8515 Schwartz Rd	Fort Wayne	IN	46835	Exempt Public Charity	General Support*	1,000 00
Rescue Ministries	Lockbox 1 PO Box 2589	Fort Wayne	IN	46801	Exempt Public Charity	General Support*	5,000 00
South Side Opportunity Services Inc	4001 South Anthony Blvd	Fort Wayne	IN	46806	Exempt Public Charity	General Support*	2,000 00
STAR 88 3	6600 North Clinton Street	Fort Wayne	IN	46825	Exempt Public Charity	General Support*	2,000 00
Summit Club, Inc	110 W Berry Street, Ste 2500	Fort Wayne	IN	46802	Exempt Public Charity	General Support*	557 86
Tapestries of Life	PO Box B	Fabens	TX	79838	Exempt Public Charity	General Support*	1,500 00
Taylor University	236 West Reade Ave	Upland	IN	46989	Exempt School	Taylor Fund	25,000 00
The Associated Churches	602 E Wayne Street	Fort Wayne	IN	46802	Exempt Assoc of Churches	General Support*	5,000 00
The Griffith Insurance Education Foundation	623 High Street	Worthington	OH	43085	Exempt Foundation	General Support*	3,500 00
The Salvation Army	2901 North Clinton Street	Fort Wayne	IN	46805	Exempt Public Charity	General Support*	1,000 00
True Life Choices	3701 Calhoun Street, Ste D	Fort Wayne	IN	46807	Exempt Public Charity	General Support*	2,500 00
United Way of Allen County	PO Box 11784	Fort Wayne	IN	46860	Exempt Public Charity	General Support*	3,000 00
University of St Francis	2701 Spring Street	Fort Wayne	IN	46808	Exempt School	Scholarship	2,500 00
Vera Bradley Foundation for Breast Cancer	P O Box 80201	Fort Wayne	IN	46898	Exempt Public Charity	General Support*	5,000 00
Vitality Care Institute	2825 Hillegas Road	Fort Wayne	IN	46808	Exempt Public Charity	General Support*	2,120 00
WBCL Sharathon	1025 West Rudisill Blvd	Fort Wayne	IN	46807	Exempt Public Charity	General Support*	5,000 00
World Relief	7 East Baltimore	Baltimore	MD	21202	Exempt Public Charity	General Support*	20,000 00
World Ventures - Serbia Now	23526 Dawkins Road	Woodburn	IN	46797	Exempt Public Charity	General Support*	12,500 00
World Ventures - Serbia Now	23526 Dawkins Road	Woodburn	IN	46797	Exempt Public Charity	General Support*	12,500 00
YFC - Prime Time	2825 Hillegas Road	Fort Wayne	IN	46808	Exempt Public Charity	General Support*	25,000 00
YMCA of Greater Fort Wayne	347 W Berry Street, Ste 500	Fort Wayne	IN	46802	Exempt Public Charity	General Support*	500 00
Youth for Chnst	2825 Hillegas Road	Fort Wayne	IN	46808	Exempt Public Charity	General Support*	35,000 00
							<u>298,707 86</u>

*GENERAL SUPPORT CONTRIBUTIONS ARE GIVEN WITHOUT ANY LIMITATIONS OR RESTRICTIONS. THE CONTRIBUTIONS ARE TO BE USED FOR THE CHARITABLE PURPOSE OF EACH ORGANIZATION

[illegible]