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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052
2009

For calendar year 2009, or tax year beginning 01-01-2009 , and ending 12-31-2009

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.	Name of foundation THE KANTZLER FOUNDATION		A Employer identification number 23-7422733	
	Number and street (or P O box number if mail is not delivered to street address) Room/suite 1000 ADAMS STREET ROOM/SUITE 200		B Telephone number (see page 10 of the instructions) (989) 892-0591	
	City or town, state, and ZIP code BAY CITY, MI 48708		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 ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			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 ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 5,081,429		J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)		

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	129,546	129,546		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-243,832			
	b Gross sales price for all assets on line 6a <u>2,081,506</u>				
	7 Capital gain net income (from Part IV , line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	9,334	9,334		
	12 Total. Add lines 1 through 11	-104,952	138,880		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	6,100	2,033		4,067
	c Other professional fees (attach schedule)	17,589	14,474		2,615
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	4,209	109		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	27,898	16,616		6,682
	25 Contributions, gifts, grants paid	232,501			232,501
	26 Total expenses and disbursements. Add lines 24 and 25	260,399	16,616		239,183
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-365,351			
	b Net investment income (if negative, enter -0-)		122,264		
	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	171,438	91,128	91,128
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)	902,288	739,447	783,046
	b	Investments—corporate stock (attach schedule)	3,238,664	 3,168,828	3,326,981
	c	Investments—corporate bonds (attach schedule).	800,699	 701,390	693,357
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	131,878	 181,878	160,190
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)	 29,771	 26,727	 26,727	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	5,274,738	4,909,398	5,081,429	
Liabilities	17	Accounts payable and accrued expenses	1,086	1,097	
	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)	1,086	1,097	
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	5,273,652	4,908,301	
	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			
	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 page 17 of the instructions)	5,273,652	4,908,301	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	5,274,738	4,909,398	

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 5,273,652
2	Enter amount from Part I, line 27a	2 -365,351
3	Other increases not included in line 2 (itemize) ▶ _____	3
4	Add lines 1, 2, and 3	4 4,908,301
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 4,908,301

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)
1 a	PUBLICLY TRADED SECURITIES	P	2009-12-31	2009-12-31
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 2,081,506		2,325,338	-243,832
b			
c			
d			
e			

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

(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			-243,832
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	-243,832
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 pages 13 and 17 of 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 page 18 of 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))
2008	364,773	5,622,599	0 064876
2007	341,856	6,476,088	0 052787
2006	289,037	6,111,891	0 047291
2005	336,376	5,753,039	0 058469
2004	301,324	5,547,672	0 054315

2	Total of line 1, column (d).	2	0 277738
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 055548
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.	4	4,626,052
5	Multiply line 4 by line 3.	5	256,968
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	1,223
7	Add lines 5 and 6.	7	258,191
8	Enter qualifying distributions from Part XII, line 4.	8	239,183

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

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1			
		Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	2,445
c		All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3		Add lines 1 and 2.		3	2,445
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5		Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	2,445
6		Credits/Payments			
a		2009 estimated tax payments and 2008 overpayment credited to 2009	6a	1,400	
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	1,400
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	1,045
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 0	Refunded	11	

Part VII-AStatements 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?		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?			No
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year?	1c		
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? If "Yes," attach a detailed description of the activities.	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? If "Yes," attach a conformed copy of the changes	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? If "Yes," attach the statement required by General Instruction T.	5		No
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?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) MI			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	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).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address NONE	13	Yes	
14	The books are in care of JEROME YANTZ Telephone no (989) 893-5577 Located at 1000 ADAMS STREET STE 200 BAY CITY MI ZIP+4 48708			
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 page 20 of the instructions)?. Organizations relying on a current notice regarding disaster assistance check here.	1b		
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		
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?. 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 page 20 of the instructions).	2b		
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 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		
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 2009?	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))?

Yes

✓

No

(2)

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

Yes

✓

No

(3)

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

Yes

✓

No

(4)

Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions). . .

Yes

✓

No

(5)

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

Yes

✓

No

b

If any answer is “Yes” to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.

✓

c

If the answer is “Yes” to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

Yes

No

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

No

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

Part VIII

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

1

List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				

2

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

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

Total

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

Part VIII Information About Officers and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE".

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

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

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 page 23 of the instructions)

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

1	N/A	
2		
All other program-related investments See page 24 of 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	4,491,866
b	Average of monthly cash balances.	1b	181,632
c	Fair market value of all other assets (see page 24 of the instructions).	1c	23,001
d	Total (add lines 1a, b, and c).	1d	4,696,499
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	4,696,499
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	70,447
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	4,626,052
6	Minimum investment return. Enter 5% of line 5.	6	231,303

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	231,303
2a	Tax on investment income for 2009 from Part VI, line 5.	2a	2,445
b	Income tax for 2009 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,445
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	228,858
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	228,858
6	Deduction from distributable amount (see page 25 of the instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	228,858

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	239,183
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	239,183
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	239,183
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 2008	(c) 2008	(d) 2009
1	Distributable amount for 2009 from Part XI, line 7				228,858
2	Undistributed income, if any, as of the end of 2008				
a	Enter amount for 2008 only.				
b	Total for prior years 20____, 20____, 20____				
3	Excess distributions carryover, if any, to 2009				
a	From 2004.				28,836
b	From 2005.				58,874
c	From 2006.				
d	From 2007.				24,068
e	From 2008.				86,089
f	Total of lines 3a through e.	197,867			
4	Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 239,183				
a	Applied to 2008, but not more than line 2a				
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .				
d	Applied to 2009 distributable amount.				228,858
e	Remaining amount distributed out of corpus	10,325			
5	Excess distributions carryover applied to 2009 (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	208,192			
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 page 27 of the instructions . . .				
e	Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				
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 page 27 of the instructions).				
8	Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions).	28,836			
9	Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	179,356			
10	Analysis of line 9				
a	Excess from 2005.				58,874
b	Excess from 2006.				
c	Excess from 2007.				24,068
d	Excess from 2008.				86,089
e	Excess from 2009.				10,325

Part XIV

Private Operating Foundations (see page 27 of 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 2009, 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)

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) 2009	(b) 2008	(c) 2007	(d) 2006	
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 page 27 of the instructions.)

1

Information Regarding Foundation Managers:

a

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

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

2

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

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

a

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

THE KANTZLER FOUNDATION
PERE MARQUETTE DEPOT
919 BOUTELL PLACE STE 200
BAY CITY, MI 48708
(989) 892-0591

b

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

INFORMATION TO INCLUDE IN GRANT REQUESTS FOR THE KANTZLER FOUNDATION COVER LETTER INCLUDE AMOUNT BEING REQUESTED ORGANIZATIONAL MISSION EXECUTIVE SUMMARY BENEFITS TO THE COMMUNITY ANTICIPATED OUTCOMES PROJECT DESCRIPTION FUNDING GOAL-NAME OF ALL SOURCES AND DOLLAR AMOUNTS BENEFIT TO ORGANIZATION/COMMUNITY SEGMENT OF COMMUNITY SERVED FINANCES-ORGANIZATION PROGRAM BUDGET TO INCLUDE ALL SOURCES OF REVENUE CURRENT BALANCE SHEET CURRENT INCOME STATEMENT COPY OF THE ORGANIZATION'S FEDERAL TAX EXEMPT RULING FROM THE IRS COPY OF 990 PRIMARY SOURCES OF REVENUE FOR THE ORGANIZATION GOVERNANCE BOARD OF DIRECTORS/TRUSTEES NAMES AND OCCUPATIONS ATTACHMENTS LETTERS OF SUPPORT ANY ADDITIONAL INFORMATION OR DOCUMENTATION WHICH THE APPLICANT DEEMS PERTINENT IF THE INFORMATION REQUESTED IS NOT AVAILABLE, PLEASE EXPLAIN

c

Any submission deadlines

NON-PROFITS MUST HAVE THEIR GRANT REQUESTS IN TWO TO THREE WEEKS PRIOR TO EACH SCHEDULED BOARD MEETI

d

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

CHARITABLE, EDUCATIONAL, SCIENTIFIC, OR ARTISTIC PROGRAMS AND PURPOSES BENEFICIAL TO THE PEOPLE OF THE GREATER BAY COUNTY COMMUNITY

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)				
a Paid during the year See Additional Data Table				
Total			3a	232,501
b Approved for future payment See Additional Data Table				
Total			3b	664,166

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2009)

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?		Yes	No
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash.	1a(1)		No
	(2) Other assets.	1a(2)		No
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
	(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
	(3) Rental of facilities, equipment, or other assets.	1b(3)		No
	(4) Reimbursement arrangements.	1b(4)		No
	(5) Loans or loan guarantees.	1b(5)		No
	(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
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 foundation. 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.			

[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

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge				
*****		2010-05-11	*****	
Signature of officer or trustee		Date	Title	
Paid Preparer's Use Only	Preparer's Signature	LAURA M EBEL	Date	2010-05-11
	Firm's name (or yours if self-employed), address, and ZIP code	ANDREWS HOOPER & PAVLIK PLC	Check if self- employed	Preparer's identifying number (see Signature on page 30 of the instructions)
		5300 GRATIOT RD	EIN	
		SAGINAW, MI 486386035	Phone no (989) 497-5300	

Additional Data

Software ID: 09000034
Software Version: 09510950
EIN: 23-7422733
Name: THE KANTZLER FOUNDATION

Form 990PF Part VIII 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
DOMINIC MONASTIERE	PRESIDENT 0 26	0	0	0
919 BOUTELL PLACE STE 200 BAY CITY, MI 48708				
JEROME YANTZ	TREASURER 0 26	0	0	0
919 BOUTELL PLACE STE 200 BAY CITY, MI 48708				
ROBERT SAROW	SECRETARY 0 26	0	0	0
919 BOUTELL PLACE STE 200 BAY CITY, MI 48708				
ANDREA HALES	TRUSTEE 0 26	0	0	0
919 BOUTELL PLACE STE 200 BAY CITY, MI 48708				
LINDA HEEMSTRA	TRUSTEE 0 26	0	0	0
919 BOUTELL PLACE STE 200 BAY CITY, MI 48708				
RUTH JAFFE	TRUSTEE 0 26	0	0	0
919 BOUTELL PLACE STE 200 BAY CITY, MI 48708				
D BRIAN LAW	TRUSTEE 0 26	0	0	0
919 BOUTELL PLACE STE 200 BAY CITY, MI 48708				
CLIFFORD VAN DYKE	TRUSTEE 0 26	0	0	0
919 BOUTELL PLACE STE 200 BAY CITY, MI 48708				
VALERIE ROOF	TRUSTEE 0 26	0	0	0
919 BOUTELL PLACE STE 200 BAY CITY, MI 48708				
KATHY CZERWINSKI	ADMIN 0 26	0	0	0
919 BOUTELL PLACE STE 200 BAY CITY, MI 48708				

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
BAY ARTS COUNCIL BAY ARTS COUNCIL915 WASHINGTON AVE 915 WASHINGTON AVE BAY CITY,MI 48708			PURCHASE OF THE MASONIC BUILDING	33,334
LAKE HURON AREA BOY SCOUT LAKE HURON AREA BOY SCOUT 5001S 11 MILE RD 5001 S 11 MILE RD AUBURN,MI 48611			RENOVATION OF CAMP	16,667
BAY AREA FAMILY YMCA BAY AREA FAMILY YMCA111 N MADISON AVE 111 N MADISON AVE BAY CITY,MI 48706			ASSIST IN FUNDING OF NEW BUILDING	100,000
DOWNTOWN BAY CITY MGT BD DOWNTOWN BAY CITY MGT BD901 SAGINAW ST 901 SAGINAW ST BAY CITY,MI 48708			REDEVELOPMENT OF WENONAH PARK	57,500
MIDMICHIGAN CHILDREN'S MU MIDMICHIGAN CHILDREN'S MU315 W GENESEE AVE 315 W GENESEE AVE SAGINAW,MI 48602			FUNDING FOR CHILDREN'S MUSEUM	20,000
SAGINAW RIVER MARINE HIST SAGINAW RIVER MARINE HISTPO BOX 2051 PO BOX 2051 BAY CITY,MI 48707			LEASE OF ARTIFACT STORAGE SPACE	5,000
Total  3a				232,501

Form 990PF Part XV Line 3b - Grants and Contributions 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)				
b <i>Approved for future payment</i>				
BAY AREA FAMILY YMCA BAY AREA FAMILU YMCA111 N MADISON AVE 111 N MADISON AVE BAY CITY,MI 48706	N/A	N/A	ASSIST IN FUNDING OF NEW BUILDING	285,000
BAY ARTS COUNCIL BAY ARTS COUNCIL915 WASHINGTON AVE 915 WASHINGTON AVE BAY CITY,MI 48708	N/A	N/A	PURCHASE OF THE MASONIC BUILDING	66,666
DOWNTOWN BAY CITY MGT BD DOWNTOWN BAY CITY MGT BD901 SAGINAW ST 901 SAGINAW ST BAY CITY,MI 48708	N/A	N/A	REDEVELOPMENT OF WENONAH PARK	57,500
FRIENDS OF THE BAY CITY R FRIENDS OF THE BAY CITY R3582 STATE PARK DRIVE 3582 STATE PARK DRIVE BAY CITY,MI 48706	N/A	N/A	SPRAY PARK AT BAY CITY RECREATION	50,000
MIDMICHIGAN CHILDREN'S MU MIDMICHIGAN CHILDREN'S MU315 W GENESEE AVE 315 W GENESEE AVE SAGINAW,MI 48602	N/A	N/A	FUNDING FOR CHILDREN'S MUSEUM	40,000
SAGINAW RIVER MARINE HIST SAGINAW RIVER MARINE HISTPO BOX 2051 PO BOX 2051 BAY CITY,MI 48707	N/A	N/A	LEASE PAYMENT ON DO- ALL STORAGE FACI	5,000
SAGINAW VALLEY STATE UNIV SAGINAW VALLEY STATE UNIV7400 BAY RD 7400 BAY RD SAGINAW,MI 48604	N/A	N/A	LEADERSHIP FELLOWS PROGRAM	60,000
SAGINAW VALLEY NAVAL SHIP SAGINAW VALLEY NAVAL SHIP3727 WILDER RD B 3727 WILDER RD B BAY CITY,MI 48706	N/A	N/A	RELOCATION OF U S S EDSON	100,000
Total  3b				664,166

TY 2009 Accounting Fees Schedule

Name: THE KANTZLER FOUNDATION

EIN: 23-7422733

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INDIRECT ACCOUNTING FEES	6,100	2,033		4,067

**TY 2009 Investments Corporate
Bonds Schedule****Name:** THE KANTZLER FOUNDATION**EIN:** 23-7422733

Name of Bond	End of Year Book Value	End of Year Fair Market Value
AMERICAN EXPRESS TRAVEL	75,050	78,651
ASTRAZENECA PLC	75,906	81,926
BAY CITY COUNTRY CLUB	1	1
BEAR STEAMS COMPANIES	73,500	76,255
CITITGROUP, INC.	73,875	76,525
CREDIT SUISSE FIRST BOSTON		
FPL GROUP CAPITAL, INC.	50,432	53,186
GENERAL ELECTRIC CAPITAL CORPORATION	49,650	52,835
HSBC FINANCE CORP	50,481	50,527
HUNTINGTON NATIONAL BANK		
JP MORGAN CHASE & CO.	50,371	52,926
LEHMAN BROTHERS HOLDING	50,790	9,750
SBC COMMUNICATIONS, INC.	50,755	54,070
WAL MART STORES	49,879	53,013
WALGREEN CO NOTE	50,700	53,692

TY 2009 Investments Corporate
Stock Schedule

Name: THE KANTZLER FOUNDATION
EIN: 23-7422733

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ABBOTT LABS	36,134	37,793
ACCENTURE LTD BERMUDA		
APPLE INC.	36,683	42,146
APPLIED MATERIALS INC.	33,427	33,456
BANK HAWAII CORP	33,158	37,648
BANK OF NEW YORK MELLON CORP.	32,517	33,564
CH ROBINSON WORLDWIDE INC.	34,115	35,238
CENTRYTEL INC.	39,252	43,452
CHEVRON CORPORATION	26,403	61,592
COCA COLA CO.	42,385	39,900
COGNIZANT TECHNOLOGY SOLUTIONS CORP	34,062	40,797
CONOCOPHILLIPS	26,718	35,749
CONSTELLATION ENERGY GROUP INC.		
CORNING, INC.		
DANAHER CORP.		
DEERE & CO	32,106	37,863
WALT DISNEY PRODUCTIONS		
ENTERGY CORP	27,082	32,736
EXELON CORP.	46,214	34,209
EXXON MOBIL CORPORATION	19,421	34,095
FEDEX CORP.		
FISERV, INC.		
FOREST LAB INC.		
GENERAL ELECTRIC CO.		
GENERAL MILLS INC.	27,545	35,405
GENUINE PARTS CO.	31,895	34,164
GENZYME CORP.	33,502	29,406
HEWLETT PACKARD CO.	32,731	36,057
INTEL CORP.	33,286	34,680
INTERNATIONAL BUSINESS MACHINES CORP	21,568	32,725

Name of Stock	End of Year Book Value	End of Year Fair Market Value
JC PENNEY INC.		
JOHNSON & JOHNSON	24,056	32,205
LOCKHEED MARTIN CORP	29,687	30,140
LOWES COMPANIES, INC.		
MCDONALDS CORP	31,206	34,342
METLIFE INC.	48,509	31,815
MICROCHIP TECH	20,258	20,335
MICROSOFT CORPORATION		
MONSANTO CO	25,094	24,525
NOBLE CORPORATION	44,178	36,630
NYSE EURONEXT	30,820	27,830
ORACLE CORPORATION	33,936	39,248
PPG INDUSTRIES, INC.	22,094	23,416
PFIZER, INC.		
PRAXAIR, INC.		
PROCTER & GAMBLE COMPANY	24,154	36,378
PRUDENTIAL FINANCIAL		
ROCKWELL COLLINS INC.		
SEAGATE TECHNOLOGY		
SIMON PROPERTY GROUP, INC.	34,683	48,498
STATE STREET CORP.	32,157	26,124
STRYKER CORP.		
TJX COS INC	32,811	32,895
TEVA PHARMACEUTICAL INDUSTRIES ADR	25,020	50,562
TRANSOCEAN, INC.	21,055	33,120
UNITED NATIONAL FOODS, INC.		
UNITED TECHNOLOGIES CORP.	18,520	41,646
VERIZON COMMUNICATIONS		
WAL MART STORES INC.	45,000	48,105
WALGREEN COMPANY		

Name of Stock	End of Year Book Value	End of Year Fair Market Value
WASTE MANAGEMENT INC	33,239	37,191
WELLPOINT, INC.		
WELLS FARGO AND COMPANY		
CALL ON IWO 2/21/09 @ 61		
ALLEGIANT MID CAP VALUE	47,912	34,646
ALLIANZ CCM MID CAP		
ASTON TAMRO SMALL CAP	57,163	55,814
CAMBIAR OPPORTUNITY	419,524	399,509
DODGE & COX INTERNATIONAL STOCK	146,699	107,182
DODGE & COX STOCK FUND	188,239	158,096
FIDELITY DIVERSIFIED INTERNATIONAL	113,472	139,529
HARBOR INTERNATIONAL FUND 11	145,000	156,071
HARDING LOEVNERS EMERGING MARKETS	13,600	14,668
ISHARES TR RUSSELL 2000 GROWTH		
ISHARES TR RUSSELL MCP GROWTH	37,968	45,385
ISHARES TR RUSSELL MIDCAP GROWTH	20,378	28,631
LAZARD EMERGING MARKETS INST 638	50,000	63,105
LOOMIS SAYLES SMALL CAP GROWTH	50,000	47,910
MASTERS SELECT INTERNATIONAL	133,372	125,347
PENNSYLVANIA MUTUAL INV	56,240	46,538
ROYCE TOTAL RETURN		
T ROWE PRICE GROWTH STOCK	354,605	365,649
T ROWE PRICE EMERGING MARKETS	55,000	63,214
VANGUARD TAX-MANAGED FUND		
VANGUARD INTERNATIONAL EQUITY	22,975	38,007

TY 2009 Investments - Other Schedule

Name: THE KANTZLER FOUNDATION

EIN: 23-7422733

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
BARCLAYS BANK PLC STRUCTURED NOTE	AT COST	65,878	54,568
CREDI-SUISSE STRUCTURED NOTE	AT COST	33,000	32,360
JP MORGAN STRUCTURED NOTE	AT COST	33,000	23,262
CHEMICAL BANK-CERTIFICATE OF DEPOSIT	AT COST	50,000	50,000

TY 2009 Other Assets Schedule

Name: THE KANTZLER FOUNDATION

EIN: 23-7422733

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ARTWORK	23,000	23,000	23,000
INTEREST & DIVIDENDS RECEIVABLE	6,771	3,727	3,727

TY 2009 Other Income Schedule

Name: THE KANTZLER FOUNDATION

EIN: 23-7422733

Description	Revenue And Expenses Per Books	Net Invest ment Income	Adjusted Net Income
LITIGATION SETTLEMENT	9,334	9,334	

TY 2009 Other Professional Fees Schedule**Name:** THE KANTZLER FOUNDATION**EIN:** 23-7422733

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DUES MICHIGAN COUNCIL OF FOUNDAT	1,400			900
FIDUCIARY FEES	14,474	14,474		
ADMINISTRATIVE	1,715			1,715

TY 2009 Taxes Schedule

Name: THE KANTZLER FOUNDATION

EIN: 23-7422733

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN INCOME TAX	109	109		
FEDERAL EXCISE TAX	4,100			