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Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

OMB No 1545-0052

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 , 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.	Name of foundation TOM & PATTY DOAR FOUNDATION INC		A Employer identification number 26-0320343
	Number and street (or P O box number if mail is not delivered to street address) C/O JPMORGAN CHASE BANK, NA; P O BOX 3038		B Telephone number (414) 977-1210
	City or town, state, and ZIP code MILWAUKEE, WI 53201		C If exemption application is pending, check here <input type="checkbox"/>
			D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 884,775.		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> If the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		293.	293.		STATEMENT 1
4 Dividends and interest from securities		11,093.	11,093.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		<27,328.>			
b Gross sales price for all assets on line 6a		87,697.			
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)					
11 Other income					
12 Total. Add lines 1 through 11		<15,942.>	11,386.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees					
c Other professional fees		STMT 3	3,268.	2,451.	817.
17 Interest					
18 Taxes		STMT 4	288.	110.	0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses					
24 Total operating and administrative expenses. Add lines 13 through 23		3,556.	2,561.		817.
25 Contributions, gifts, grants paid		39,500.			39,500.
26 Total expenses and disbursements. Add lines 24 and 25		43,056.	2,561.		40,317.
27 Subtract line 26 from line 12		<58,998.>			
a Excess of revenue over expenses and disbursements			8,825.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)				N/A	

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02-02-10

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

Form 990-PF (2009)

TOM & PATTY DOAR FOUNDATION INC

Form 990-PF (2009)

2600864200 / V06774000

26-0320343

Page **2**

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing					
	2 Savings and temporary cash investments			473,310.	139,282.	139,282.
	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					
	7 Other notes and loans receivable ▶					
	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					
	b Investments - corporate stock STMT 5			286,081.	431,739.	415,216.
	c Investments - corporate bonds STMT 6			199,587.	328,979.	330,277.
11 Investments - land, buildings, and equipment basis ▶						
Less: accumulated depreciation ▶						
12 Investments - mortgage loans						
13 Investments - other						
14 Land, buildings, and equipment basis ▶						
Less: accumulated depreciation ▶						
15 Other assets (describe ▶)						
16 Total assets (to be completed by all filers)			958,978.	900,000.	884,775.	
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					
	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 ▶ <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			958,978.	900,000.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			0.	0.	
29 Retained earnings, accumulated income, endowment, or other funds			0.	0.		
30 Total net assets or fund balances			958,978.	900,000.		
31 Total liabilities and net assets/fund balances			958,978.	900,000.		

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	958,978.
2 Enter amount from Part I, line 27a	2	<58,998.>
3 Other increases not included in line 2 (itemize) ▶ RETURN OF CAPITAL	3	20.
4 Add lines 1, 2, and 3	4	900,000.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	900,000.

Form **990-PF** (2009)

923511
02-02-10

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 PUBLICLY TRADED SECURITIES			P		
b CAPITAL GAINS DIVIDENDS					
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 87,690.		115,025.	<27,335.>		
b 7.			7.		
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a			<27,335.>		
b			7.		
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	<27,328.>	
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) If (loss), enter -0- in Part I, line 8			3	N/A	

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 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	11,332.	912,779.	.012415
2007	0.	594,518.	.000000
2006			
2005			
2004			
2 Total of line 1, column (d)			2 .012415
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 .006208
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 864,621.
5 Multiply line 4 by line 3			5 5,368.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 88.
7 Add lines 5 and 6			7 5,456.
8 Enter qualifying distributions from Part XII, line 4			8 40,317.

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.

TOM & PATTY DOAR FOUNDATION INC

Form 990-PF (2009)

2600864200 / V06774000

26-0320343

Page 4

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter. _____ (attach copy of letter if necessary-see instructions)		1	88.
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 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	88.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	88.
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a 5,600.		
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	5,600.	
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	5,512.	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax <input type="checkbox"/> 0. Refunded <input checked="" type="checkbox"/>	11	5,512.	

Part VII-A Statements Regarding Activities

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

Form 990-PF (2009)

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 ► N/A	13	X	
14	The books are in care of ► JPMORGAN CHASE BANK, N.A. Telephone no. ► (312) 732-6385 Located at ► 10 S DEARBORN - 8TH FLOOR, CHICAGO, IL ZIP+4 ► 60603			
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		N/A

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years ►		
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 instructions)	N/A	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 ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a
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

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)?

☐ 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)?

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?

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?

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.

(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
W.T.DOAR, JR.	PRESIDENT			
103 N. KNOWLES AVE.				
NEW RICHMOND, WI 54017	1.00	0.	0.	0.
KATHLEEN DOAR	SECRETARY			
103 N. KNOWLES AVE.				
NEW RICHMOND, WI 54017	1.00	0.	0.	0.
THOMAS DOAR, III	DIRECTOR			
103 N. KNOWLES AVE.				
NEW RICHMOND, WI 54017	1.00	0.	0.	0.
PATRICK DOAR	DIRECTOR			
103 N. KNOWLES AVE.				
NEW RICHMOND, WI 54017	1.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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

Form 990-PF (2009)

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

[illegible]

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

Part IX-A	Summary of Direct Charitable Activities
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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.

1	N/A	
2		
3		
4		

Part IX-B	Summary of Program-Related Investments
------------------	---

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

1	N/A	
2		
3	All other program-related investments See instructions	
Total. Add lines 1 through 3		0.

Form **990-PF** (2009)

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	461,549.
b	Average of monthly cash balances	1b	416,239.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	877,788.
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	877,788.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	13,167.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	864,621.
6	Minimum investment return. Enter 5% of line 5	6	43,231.

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	43,231.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	88.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	88.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	43,143.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	43,143.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	43,143.

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	40,317.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	40,317.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	88.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	40,229.

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.

Form 990-PF (2009)

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				43,143.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			39,332.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 40,317.				
a Applied to 2008, but not more than line 2a			39,332.	
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				985.
e Remaining amount distributed out of corpus	0.			
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	0.			
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 instr			0.	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				42,158.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

Part XV	Supplementary Information (continued)
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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>					
SEE STATEMENT 7					
Total				▶ 3a	39,500.
b <i>Approved for future payment</i>					
NONE					
Total				▶ 3b	0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion 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			14	293.	
4 Dividends and interest from securities			14	11,093.	
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			18	<27,328.>	
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)		0.		<15,942.>	0.
13 Total. Add line 12, columns (b), (d), and (e)				<15,942.>	

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

Part XVII

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.

Sign Here	Signature of officer or trustee <i>C. J. [Signature]</i>		Date <i>4/7/2010</i>	Title <i>President</i>
	Preparer's signature <i>Kathryn Wislow</i>		Date <i>3/31/2010</i>	Check if self-employed <input type="checkbox"/> Preparer's identifying number <i>P00037638</i>
Paid Preparer's Use Only	Firm's name (or yours if self-employed), address, and ZIP code <i>JPMORGAN CHASE BANK, NA - MILWAUKEE P.O. BOX 3038 MILWAUKEE, WI 53201-3038</i>			EIN <i>13-4994650</i>
				Phone no. <i>(414) 977-1210</i>

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
MONEY MARKET FUNDS	293.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	293.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDENDS & INTEREST	11,100.	7.	11,093.
TOTAL TO FM 990-PF, PART I, LN 4	11,100.	7.	11,093.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MGMT FEE	3,268.	2,451.		817.
TO FORM 990-PF, PG 1, LN 16C	3,268.	2,451.		817.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ESTIMATE EXCISE TAX - CURRENT YEAR	178.	0.		0.
FOREIGN TAXES WITHHELD	110.	110.		0.
TO FORM 990-PF, PG 1, LN 18	288.	110.		0.

FORM 990-PF	CORPORATE STOCK	STATEMENT	5
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE - EQUITIES	431,739.	415,216.
TOTAL TO FORM 990-PF, PART II, LINE 10B	431,739.	415,216.

FORM 990-PF	CORPORATE BONDS	STATEMENT	6
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE - FIXED INCOMME	328,979.	330,277.
TOTAL TO FORM 990-PF, PART II, LINE 10C	328,979.	330,277.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 7

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
FAMILYMEANS 1875 NORTHWESTERN AVE. S. STILLWATER, MN 55082	NONE PROGRAM SUPPORT	PUBLIC CHARITY	2,250.
FIVE LOAVES INC P.O. BOX 222 NEW RICHMOND, WI 54017	NONE PROGRAM SUPPORT	PUBLIC CHARITY	2,000.
GREEN BELT MOVEMENT INTERNATIONAL - NORTH AMERICA P.O. BOX 6745-00200 NAIROBI, KENYA	NONE PROGRAM SUPPORT	PUBLIC CHARITY	3,000.
IMMACULATE CONCEPTION CHURCH 151 S. WASHINGTON AVE. NEW RICHMOND, WI 54017	NONE PROGRAM SUPPORT	PUBLIC CHARITY	4,500.
JEREMIAH PROGRAM 1510 LAUREL AVE #100 MINNEAPOLIS, MN 55403-1244	NONE PROGRAM SUPPORT	PUBLIC CHARITY	1,000.
LAKE COUNTRY SCHOOL MONTESSORI LEARNING ENVIRONMENTS 3755 PLEASANT AVE. S. MINNEAPOLIS, MN 55409	NONE PROGRAM SUPPORT	PUBLIC CHARITY	1,500.
LUND FAMILY CENTER INC 76 GLEN ROAD BURLINGTON, VT 05401	NONE PROGRAM SUPPORT	PUBLIC CHARITY	1,000.
MOUNT HOLYOKE COLLEGE 50 COLLEGE STREET SOUTH HADLEY, MA 01075	NONE PROGRAM SUPPORT	PUBLIC CHARITY	1,000.

NEW RICHMOND AREA CENTRE, LTD 428 S. STARR AVE. NEW RICHMOND, WI 54017	NONE PROGRAM SUPPORT	PUBLIC CHARITY	5,000.
NEW RICHMOND AREA COMMUNITY FOUNDATION INC 1100 HERITAGE DRIVE NEW RICHMOND, WI 54017	NONE PROGRAM SUPPORT	PUBLIC CHARITY	5,000.
NEW RICHMOND TIGER SHARKS PARENT ASSOCIATION INC. P.O. BOX 278 NEW RICHMOND, WI 54017	NONE PROGRAM SUPPORT	PUBLIC CHARITY	500.
PHM NEW RICHMOND SENIOR HOUSING INC DBA THE DEERFIELD 1127 W. 8TH ST. NEW RICHMOND, WI 54017	NONE PROGRAM SUPPORT	PUBLIC CHARITY	1,500.
PROJECT LIFESAVER INC 1824 OAK RIDGE DRIVE NEW RICHMOND, WI 54017	NONE PROGRAM SUPPORT	PUBLIC CHARITY	500.
SALVATION ARMY DBA GRACE PLACE 203 CHURCH HILL ROAD SOMERSET, WI 54025	NONE PROGRAM SUPPORT	PUBLIC CHARITY	2,000.
ST. ALBANS AREA WATERSHED ASSOCIATION INC. P.O. BOX 1567 ST. ALBANS, VT 05478	NONE PROGRAM SUPPORT	PUBLIC CHARITY	500.
ST. CROIX VALLEY COMMUNITY FOUNDATION 516 SECOND STREET - STE 214 HUDSON, WI 54016	NONE PROGRAM SUPPORT	PUBLIC CHARITY	1,250.
ST. CROIX VALLEY HABITAT FOR HUMANITY 439 W. MAPLES ST. #202 RIVER FALLS, WI 54022	NONE PROGRAM SUPPORT	PUBLIC CHARITY	1,000.
VERMONT ETV INC. 204 ETHAN ALLEN AVE. COLCHESTER, VT 05446	NONE PROGRAM SUPPORT	PUBLIC CHARITY	1,000.

VERMONT PUBLIC RADIO 365 TROY AVE. COLCHESTER, VT 05446	NONE PROGRAM SUPPORT	PUBLIC CHARITY	1,000.
WISCONSIN INDIANHEAD TECHNICAL COLLEGE FOUNDATION INC 505 PINE RIVER DR. SHELL LAKE, WI 54871	NONE PROGRAM SUPPORT	PUBLIC CHARITY	1,000.
WOMEN FOR WOMEN FOUNDATION INC. 2925 PROFESSIONAL PLACE #201 COLORADO SPRINGS, CO 80904	NONE PROGRAM SUPPORT	PUBLIC CHARITY	3,000.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

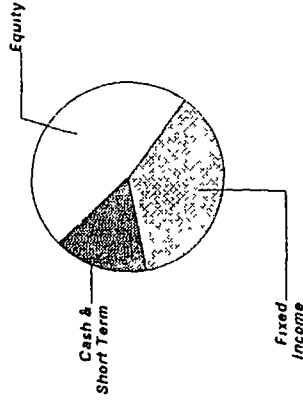
39,500.

TOM AND PATTY DOAR FND NP ACCT. V06774000
As of 12/31/09

Account Summary

Asset Allocation	Beginning Market Value	Ending Market Value	Change In Value	Estimated Annual Income	Current Allocation
Equity	409,567.94	415,216.16	5,648.22	4,279.39	47%
Cash & Short Term	136,568.70	139,281.62	2,712.92	97.49	16%
Fixed Income	331,771.62	330,276.64	(1,494.98)	11,790.84	37%
Market Value	\$877,908.26	\$884,774.42	\$6,866.16		100%
Accruals	635.70	788.89	153.19		
Market Value with Accruals	\$878,543.96	\$885,563.31	\$7,019.35		

Asset Allocation

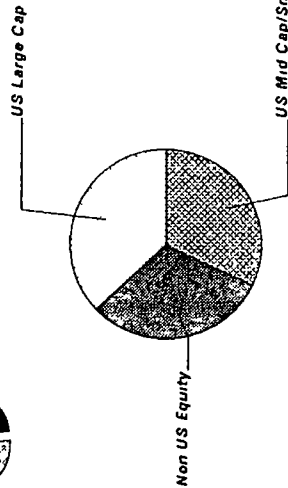


TOM AND PATTY DOAR FND NP ACCT. V06774000
As of 12/31/09

Equity Summary

Asset Categories	Beginning Market Value	Ending Market Value	Change In Value	Current Allocation
US Large Cap	152,961 31	155,170 67	2,209 36	17%
US Mid Cap/Small Cap	127,340 27	131,106 02	3,765 75	15%
Non US Equity	129,266 36	128,939 47	(326 89)	15%
Total Value	\$409,567.94	\$415,216.16	\$5,648.22	47%

Asset Categories



Market Value/Cost

	Current Period Value
Market Value	415,216 16
Tax Cost	431,738 95
Unrealized Gain/Loss	(16,522 79)
Estimated Annual Income	4,279 39
Accrued Dividends	47 22
Yield	1 03%

TOM AND PATTY DOAR FND NP ACCT V06774000
As of 12/31/09

Equity Detail

	Quantity	Price	Market Value	Tax Cost	Unrealized Gain/Loss	Estimated Annual Income		Yield
						Accrued Dividends		
US Large Cap								
ISHARES RUSSELL 1000 VALUE INDEX FUND	478 000	57 40	27,437 20	27,167 55	269 65	670 63		2 44 %
464287-59-8 IWD								
JPMORGAN TR I	2,333.621	11 73	27,373 37	27,000 00	373 37	130 68		0 48 %
US LARGE CAP VALUE PLUS SELECT SHARE CLASS FUND 1513								
4812A4-65-8 JTVS X								
JPMORGAN US LARGE CAP CORE PLUS FUND SELECT	2,626 050	18.18	47,741 59	50,000 00	(2,258 41)	299 36		0 63 %
FUND 1002								
4812A2-38-9 JLPS X								
SPDR TRUST SERIES 1	80 000	111 44	8,915.20	8,754 40	160 80	188 88		2 12 %
78462F-10-3 SPY						47 22		
THORNBURG VALUE FUND	1,383 892	31 58	43,703 31	50,000 00	(6,296 69)	705 78		1 61 %
FD CLI								
885215-63-2 TVIF X								
Total US Large Cap			\$155,170.67	\$162,921.95	(\$7,751.28)	\$1,995.33	\$47.22	1.29 %
US Mid Cap/Small Cap								
ISHARES RUSSELL MIDCAP INDEX FUND	133 000	82 51	10,973 83	12,930 26	(1,956 43)	216 79		1 98 %
464287-49-9 IWR								

TOM AND PATTY DOAR FND NP ACCT. V06774000
As of 12/31/09

	Quantity	Price	Market Value	Tax Cost	Unrealized Gain/Loss	Estimated Annual Income		Yield
						Accrued Dividends		
US Mid Cap/Small Cap								
JPMORGAN SMALL CAP GROWTH FUND SELECT SHARE CLASS FUND 3136 4812C0-57-1 OGGF X	2,137.767	8.71	18,619.95	18,000.00	619.95			
JPMORGAN TRI HIGHBRIDGE STATISTICAL MARKET NEUTRAL FUND SELECT SHARES FUND # 1011 4812A2-43-9 HSKS X	2,798.507	15.74	44,048.50	45,000.00	(951.50)	92.35	0.21%	
JPMORGAN US REAL ESTATE FUND SELECT SHARE CLASS FUND 3037 4812C0-61-3 SUIE X	1,617.251	12.21	19,746.63	18,000.00	1,746.63	454.44	2.30%	
MANAGERS AMG FUNDS-TIMESSQUARE MID CAP GROWTH FUND 561709-83-3 TMDP X	1,419.698	11.80	16,752.44	16,000.00	752.44			
PROFESSIONALLY MANAGED PORTFOLIOS THE OSTERWEIS FUND 742935-40-6 OSTF X	861.326	24.34	20,964.67	20,000.00	964.67	76.65	0.37%	
Total US Mid Cap/Small Cap			\$131,106.02	\$129,930.26	\$1,175.76	\$840.23	0.64%	
Non US Equity								
DODGE & COX INTERNATIONAL STOCK 256206-10-3 DODF X	610.054	31.85	19,430.22	25,000.00	(5,569.78)	265.98	1.37%	

TOM AND PATTY DOAR FND NP ACCT. V06774000
As of 12/31/09

	Quantity	Price	Market Value	Tax Cost	Unrealized Gain/Loss	Estimated Annual Income		Yield
						Accrued Dividends		
Non US Equity								
ISHARES MSCI EAFE INDEX FUND 464287-46-5 EFA	157 000	55 28	8,678 96	8,840 67	(161 71)	226 23		2 61 %
JPMORGAN ASIA EQUITY FUND SELECT SHARE CLASS FUND 1134 4812A0-70-6 JPAS X	891 110	31 20	27,802 63	33,125 00	(5,322 37)	102 47		0 37 %
JPMORGAN INTERNATIONAL VALUE FUND SELECT SHARE CLASS FUND 1296 4812A0-56-5 JIES X	2,067 381	12 68	26,214 39	27,000 00	(785 61)	634 68		2 42 %
MATTHEWS PACIFIC TIGER FUND -CL I 577130-10-7 MAPT X	1,468 988	19 23	28,248 64	27,000 00	1,248 64	214 47		0 76 %
SPDR GOLD TRUST 78463V-10-7 GLD	173 000	107 31	18,564 63	17,921 07	643 56			
Total Non US Equity			\$128,939.47	\$138,886.74	(\$9,947.27)	\$1,443.83		1.12 %

JOHN W. NICHOLSON

A pie chart with a single slice shaded in black. The label 'Cash & Short Term' is written vertically next to the slice.

Market Value/Cost	Current Period Value
Market Value	139,281 62
Tax Cost	139,281 62
Estimated Annual Income	97 49
Accrued Interest	8.20
Yield	0.07 %

TOM AND PATTY DOAR FND NP ACCT. V06774000
As of 12/31/09

Note ¹ This is the Annual Percentage Yield (APY) which is the rate earned if balances remain on deposit for a full year with compounding, there is no change in the interest rate and all interest is left in the account

Cash & Short Term Detail

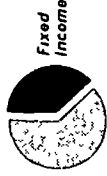
	Quantity	Price	Market Value	Tax Cost		Unrealized Gain/Loss	Estimated Annual Income		Yield
				Adjusted	Original		Accrued Interest		
Cash									
US DOLLAR PRINCIPAL	131,731 83	1 00	131,731 83	131,731 83			92 21	8 20	0 07 % ¹
US DOLLAR INCOME	7,549 79	1 00	7,549 79	7,549 79			5 28		0 07 % ¹
Total Cash			\$139,281.62	\$139,281.62		\$0.00	\$97.49	\$8.20	0.07 %

TOM AND PATTY DOAR FND NP ACCT. V06774000
As of 12/31/09

Fixed Income Summary

Asset Categories	Beginning Market Value	Ending Market Value	Change In Value	Current Allocation
US Fixed Income - Taxable	331,771.62	330,276.64	(1,494.98)	37%

Asset Categories



Market Value/Cost

	Current Period Value
Market Value	330,276.64
Tax Cost	328,979.21
Unrealized Gain/Loss	1,297.43
Estimated Annual Income	11,790.84
Accrued Interest	733.47
Yield	3.57%

Fixed Income Summary CONTINUED**SUMMARY BY MATURITY**

Fixed Income	Market Value	% of Bond Portfolio
Less than 5 years ¹	330,276 64	100%

SUMMARY BY TYPE

Fixed Income	Market Value	% of Bond Portfolio
Mutual Funds	330,276 64	100%

¹The years indicate the number of years until the bond is scheduled to mature based on the statement end date. Some bonds may be called, or paid in full, before their stated maturity.

TOM AND PATTY DOAR FND NP ACCT. V06774000
As of 12/31/09

Fixed Income Detail

	Quantity	Price	Market Value	Tax Cost Adjusted Original	Unrealized Gain/Loss	Estimated Annual Income Accrued Interest	Yield
US Fixed Income - Taxable							
ISHARES BARCLAYS TIPS BOND FUND 464287-17-6	259 000	103.90	26,910 10	27,043 73	(133 63)	1,046 87	3 89%
PAYDEN HIGH INCOME FUND 704329-57-2	3,671 072	6 95	25,513 95	25,000 00	513 95	1,982 37	7 77%
JPMORGAN INTERNATIONAL CURRENCY INCOME FUND 30-Day Annualized Yield 1 20% 4812A3-29-6	1,598.119	10.75	17,179 78	17,435 48	(255 70)	9 58 8 29	0 06%
JPMORGAN STRATEGIC INCOME OPPORTUNITIES FUND 3844 30-Day Annualized Yield. 2.76% 4812A4-35-1	1,475 694	11 59	17,103 29	17,000 00	103 29	612 41 53.12	3 58%
JPMORGAN HIGH YIELD BOND FUND SELECT CLASS FUND 3580 30-Day Annualized Yield 7 59% 4812C0-80-3	3,205 128	7 74	24,807 69	25,000 00	(192 31)	1,788.46 208 33	7 21%
JPMORGAN SHORT DURATION BOND FUND SELECT CLASS FUND 3133 30-Day Annualized Yield. 2.04% 4812C1-33-0	20,162 381	10 85	218,761 83	217,500 00	1,261 83	6,351 15 463.73	2 90%
Total US Fixed Income - Taxable			\$330,276.64	\$328,979.21	\$1,297.43	\$11,790.84 \$733.47	3.57%