



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



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

, and ending

G Check all that apply:

☐ Initial return
☐ Amended return

☐ Initial return of a former public charity
☐ Address change
☐ Final return☐ Name changeUse the IRS
label
Otherwise,
print
or type
See Specific
Instructions

Name of foundation

THE TKBW PRIVATE FOUNDATION

C/O BRUCE WETZEL

Number and street (or P O box number if mail is not delivered to street address)

7550 CODER RD

Room/suite

City or town, state, and ZIP code

MAUMEE, OH 43537

A Employer identification number

34-1903674

B Telephone number

419-866-0469

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year

(from Part II, col (c), line 16)

\$ 5,974,264. (Part I, column (d) must be on cash basis.)

J Accounting method: ☒ Cash ☐ Accrual☐ Other (specify)**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	10,000.		N/A	
2	Check ☐ if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	1,955.	1,955.		STATEMENT 1
4	Dividends and interest from securities	78,292.	78,292.		STATEMENT 2
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10				
b	Gross sales price for all assets on line 6a				
7	Capital gain net income (from Part IV, line 2)		0.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss)				
11	Other income	414.	414.		STATEMENT 3
12	Total. Add lines 1 through 11	90,661.	80,661.		
13	Compensation of officers, directors, trustees, etc	0.	0.		0.
14	Other employee salaries and wages				
15	Pension plans, employer contributions				
16a	Legal fees				
b	Accounting fees	3,801.	1,900.		1,901.
c	Other professional fees				
17	Interest				
18	Taxes	3,667.	200.		0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses	564.	564.		0.
24	Total operating and administrative expenses. Add lines 13 through 23	8,032.	2,664.		1,901.
25	Contributions, gifts, grants paid	252,600.			252,600.
26	Total expenses and disbursements. Add lines 24 and 25	260,632.	2,664.		254,501.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	<169,971.>			
b	Net investment income (if negative, enter -0-)		77,997.		
c	Adjusted net income (if negative, enter -0-)			N/A	

48

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		1,250,599.	169,703.	169,703.
	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 8		1,029,306.	1,852,910.	1,813,076.
	c	Investments - corporate bonds STMT 9		42,500.	42,500.	42,769.
11	Investments - land, buildings, and equipment basis ▶					
	Less accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other STMT 10		4,066,999.	4,160,345.	3,948,716.	
14	Land, buildings, and equipment: basis ▶					
	Less accumulated depreciation ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers)		6,389,404.	6,225,458.	5,974,264.	
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 ▶ ☐					
	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		0.	0.	
28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.		
29	Retained earnings, accumulated income, endowment, or other funds		6,389,404.	6,225,458.		
30	Total net assets or fund balances		6,389,404.	6,225,458.		
31	Total liabilities and net assets/fund balances		6,389,404.	6,225,458.		

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	6,389,404.
2	Enter amount from Part I, line 27a	2	<169,971.>
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 7	3	6,025.
4	Add lines 1, 2, and 3	4	6,225,458.
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	6,225,458.

THE TKBW PRIVATE FOUNDATION

Form 990-PF (2009)

C/O BRUCE WETZEL

34-1903674

Page 3

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			
b NONE			
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			
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			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). 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 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	179,911.	6,259,087.	.028744
2007	64,180.	3,808,656.	.016851
2006	24,744.	489,217.	.050579
2005	21,091.	421,689.	.050016
2004	17,351.	384,787.	.045092

2 Total of line 1, column (d)	2	.191282
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	.038256
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	5,775,832.
5 Multiply line 4 by line 3	5	220,960.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	780.
7 Add lines 5 and 6	7	221,740.
8 Enter qualifying distributions from Part XII, line 4	8	254,501.

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.

THE TKBW PRIVATE FOUNDATION

Form 990-PF (2009)

C/O BRUCE WETZEL

34-1903674 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 ☐ 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	780.
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	780.
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	780.
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	3,320.	
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	3,320.	
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		
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	2,540.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ☒ 2,540. Refunded ☐	11	0.	

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
b 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
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? 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) ☒ OH		
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

N/A

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 ► <u>N/A</u>	13	X	
14	The books are in care of ► <u>BRUCE W. WETZEL</u> Telephone no. ► <u>419-866-0469</u> Located at ► <u>7550 CODER ROAD, MAUMEE, OHIO</u> ZIP+4 ► <u>43537</u>			
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 <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 page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	<u>N/A</u>	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?	☐ Yes ☒ No	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?	☐ Yes ☒ 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.)	<u>N/A</u>	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?	☐ 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.)	<u>N/A</u>	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

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** ☐ **5b**

Organizations relying on a current notice regarding disaster assistance check here ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? **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? **N/A** **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.

(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
BRUCE W. WETZEL 7550 CODER ROAD MAUMEE, OH 43537	TRUSTEE 10.00	0.	0.	0.
AMY C WETZEL LIPINSKI 223 WEST HARRISON MAUMEE, OH 43537	TRUSTEE 1.00	0.	0.	0.
STACY L. WETZEL 6423 BERKEY SOUTHERN WHITEHOUSE, OH 43571	TRUSTEE 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**

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	4,958,024.
b	Average of monthly cash balances	1b	905,765.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	5,863,789.
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	5,863,789.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	87,957.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,775,832.
6	Minimum investment return. Enter 5% of line 5	6	288,792.

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	288,792.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	780.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	780.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	288,012.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	288,012.
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	288,012.

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	254,501.
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	254,501.
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	780.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	253,721.

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				288,012.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			250,555.	
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: ▶ \$ 254,501.				
a Applied to 2008, but not more than line 2a			250,555.	
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				3,946.
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				284,066.
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 XIV Private Operating Foundations (see instructions and Part VII-A, question 9) **N/A**

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

	Tax year	Prior 3 years			(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
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 foundation had \$5,000 or more in assets at any time during the year-see the instructions.)

1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 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).)

BRUCE W. WETZEL

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

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

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

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

SEE STATEMENT 11

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

c Any submission deadlines:

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	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 STATEMENT 12				
Total			► 3a	252,600.
b Approved for future payment				
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	1,955.		
4 Dividends and interest from securities			14	78,292.		
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			14	414.		
8 Gain or (loss) from sales of assets other than inventory						
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue:						
a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e)		0.		80,661.		0.
13 Total. Add line 12, columns (b), (d), and (e)						80,661.

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

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

THE TKBW PRIVATE FOUNDATION
C/O BRUCE WETZEL

Employer identification number

34-1903674

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐

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) and 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 its 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).

LHA 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

THE TKBW PRIVATE FOUNDATION
C/O BRUCE WETZEL

Employer identification number

34-1903674

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	BRUCE WETZEL 7550 CODER RD MAUMEE, OH 43537	\$ 10,000.	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)
			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)

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

SOURCE	AMOUNT
UBS FINANCIAL SERVICES	1,955.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	1,955.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
UBS FINANCIAL SERVICES	78,292.	0.	78,292.
TOTAL TO FM 990-PF, PART I, LN 4	78,292.	0.	78,292.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
INTEREST INCOME FROM INVESTMENT IN BOARDWALK PIPELINE PARTNERS, L.P.	63.	63.	
INTEREST INCOME FROM INVESTMENT IN BUCKEYE PARTNERS, L.P.	208.	208.	
DIVIDEND INCOME FROM INVESTMENT IN BUCKEYE PARTNERS, L.P.	143.	143.	
TOTAL TO FORM 990-PF, PART I, LINE 11	414.	414.	

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	3,801.	1,900.		1,901.
TO FORM 990-PF, PG 1, LN 16B	3,801.	1,900.		1,901.

FORM 990-PF	TAXES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
OHIO ATTORNEY GENERAL	200.	200.		0.	
US TREASURY	3,467.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	3,667.	200.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
MEMBERSHIP ASF	495.	495.		0.	
INVESTMENT INTEREST FROM INVESTMENT IN BOARDWALK PIPELINE PARTNERS, L.P.	66.	66.		0.	
CHARITABLE CONTRIBUTION FROM INVESTMENT IN BOARDWALK PIPELINE PARTNERS, L.P.	3.	3.		0.	
TO FORM 990-PF, PG 1, LN 23	564.	564.		0.	

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES			STATEMENT	7
DESCRIPTION	AMOUNT				
TIMING DIFFERENCE BETWEEN INCOME RECEIVED AND RECORDED	6,025.				
TOTAL TO FORM 990-PF, PART III, LINE 3	6,025.				

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
BRISTOL MYERS SQUIBB CO	878.	229,399.	
UBS STOCK INVESTMENTS	1,852,032.	1,583,677.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,852,910.	1,813,076.	

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
BANK ONE CAPITAL	12,500.	12,565.	
WELLS FARGO CAPITAL	30,000.	30,204.	
TOTAL TO FORM 990-PF, PART II, LINE 10C	42,500.	42,769.	

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	10
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
UBS GLOBAL FRONTIER FD	FMV	600,003.	425,048.
UBS SELECT PRIME INST FD	FMV	3,148,148.	3,148,148.
INVESTMENT IN BOARDWALK PIPELINE PARTNERS, LP	COST	57,956.	60,060.
INVESTMENT IN BUCKEYE PARTNERS, L.P.	COST	100,820.	108,900.
UBS MUTUAL FUNDS	FMV	200,816.	150,655.
ISHARES TRUST S&P 500 INDEX	FMV	52,602.	55,905.
TOTAL TO FORM 990-PF, PART II, LINE 13		4,160,345.	3,948,716.

FORM 990-PF	GRANT APPLICATION SUBMISSION INFORMATION	STATEMENT 11
	PART XV, LINES 2A THROUGH 2D	

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

BRUCE W WETZEL
7550 CODER ROAD
MAUMEE OHIO

TELEPHONE NUMBER

419-866-8190

FORM AND CONTENT OF APPLICATIONS

A COPY OF THE APPLICATION FOR THE RECOGNITION OF THE EXEMPTION (FORM 1023),
PRIOR YEAR FORM 990 SERIES OF RETURN AND THE MOST RECENT FINANCIAL
STATEMENT.

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

NONE

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 12

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
ANGELA HOSPICE 14100 NEWBURGH RD. LIVONIA, MI 48154	GENERAL PURPOSE	501 (C)(3)	10,000.
ST. PAUL'S LUTHERN CHURCH 112 E. WAYNE ST. MAUMEE, OH 43537	GENERAL PURPOSE	501 (C)(3)	5,000.
ALZHEIMER'S ASSOCIATION 2500 NORTH REYNOLDS ROAD TOLEDO, OH 43615	GENERAL PURPOSE	501 (C)(3)	5,000.
AMERICAN INSTITUTE OF PHILANTHROPY PO BOX 578460 CHICAGO, IL 60657-8460	GENERAL PURPOSE	501 (C)(3)	100.
AMERICAN RED CROSS PO BOX 595 TOLEDO, OH 43697-0595	GENERAL PURPOSE	501 (C)(3)	5,000.
HONOR FLIGHT NW OHIO P.O. BOX 23018 TOLEDO, OH 43623	GENERAL PURPOSE	501 (C)(3)	4,000.
ANTHONY WAYNE EDUCATION P.O. BOX 294 WATERVILLE, OH 43571	GENERAL PURPOSE	501 (C)(3)	10,000.
AW SPIRIT OF GIVING 6037 SUNNY LAKE COURT SYLVANIA, OH 43560	GENERAL PURPOSE	501 (C)(3)	2,500.

ASSISTANCE DOGS OF AMERICA, INC. 8806 STATE RT 64 SWANTON, OH 43558	GENERAL PURPOSE	501 (C)(3)	5,000.
ASSOCIATION OF SMALL FOUNDATIONS 33 WILD BERRY LANE, BOX 117 UNDERHILL, VT 05489-0117	GENERAL PURPOSE	501 (C)(3)	2,500.
CHERRY STREET MISSION 105 17TH STREET TOLEDO, OH 43615	GENERAL PURPOSE	501 (C)(3)	7,500.
DOCTORS WITHOUT BORDERS 333 SEVENTH AVE, 2ND FLOOR NEW YORK, NY 10001-5004	GENERAL PURPOSE	501 (C)(3)	2,500.
FAMILY PROMISE CTR IHN 434 WESTEN AVE TOLEDO, OH 43609	GENERAL PURPOSE	501 (C)(3)	10,000.
GOERLICH CENTER 5320 HARROUN ROAD SYLVANIA, OH 43560	GENERAL PURPOSE	501 (C)(3)	10,000.
INTREPID FALLEN HEROES FUND ONE INTREPID SQ W46TH & 12TH AVE NEW YORK, NY 10036	GENERAL PURPOSE	501 (C)(3)	5,000.
ISOH/IMPACT 25182 WEST RIVER ROAD PERRYSBURG, OH 43551	GENERAL PURPOSE	501 (C)(3)	7,500.
MAKE A WISH FOUNDATION 405 MADISON TOLEDO, OH 43615	GENERAL PURPOSE	501 (C)(3)	10,000.
MARCH OF DIMES 3450 W CENTRAL AVE TOLEDO, OH 43606	GENERAL PURPOSE	501 (C)(3)	2,500.

MDA NORTHWEST OHIO 6135 TRUST DR. #103 HOLLAND, OH 43528	GENERAL PURPOSE	501 (C)(3)	2,500.
FUND AMERICAN STUDIES 1706 NEW HAMPSHIRE AVE NW WASHINGTON, DC 20009	GENERAL PURPOSE	501 (C)(3)	1,000.
MV HABITAT FOR HUMANITY 223 S FERRING BLVD TOLEDO, OH 43609	GENERAL PURPOSE	501 (C)(3)	10,000.
OTTERBINE RETIREMENT COMMUNITY 580 N STATE RT 741 LEBANON, OH 45036	GENERAL PURPOSE	501 (C)(3)	15,000.
PROGERIA RESEARCH FOUNDATION PO BOX 112 MONCLOVA, OH 43542	GENERAL PURPOSE	501 (C)(3)	20,000.
SALVATION ARMY PO BOX 798 TOLEDO, OH 43697-0798	GENERAL PURPOSE	501 (C)(3)	5,000.
ST. JUDES HOSPITAL 501 ST. JUDE PLACE MEMPHIS, TN 38105	GENERAL PURPOSE	501 (C)(3)	5,000.
ST. LUKES FOUNDATION 5901 MONCLOVA RD MAUMEE, OH 43537	GENERAL PURPOSE	501 (C)(3)	2,500.
SUNSET HOUSE 4020 INDIAN ROAD TOLEDO, OH 43606	GENERAL PURPOSE	501 (C)(3)	2,500.
THE CHURCH ON STRAYER 3000 STRAYER MAUMEE, OH 43537	GENERAL PURPOSE	501 (C)(3)	2,500.

THE COCOON SHELTER PO BOX 1165 BOWLING GREEN, OH 43402	GENERAL PURPOSE	501 (C)(3)	7,500.
TOLEDO SEAGATE FOOD BANK 526 HIGH ST TOLEDO, OH 43609	GENERAL PURPOSE	501 (C)(3)	7,500.
TOLEDO SZEGED COMMITTEE 2219 GREYCOURT TOLEDO, OH 43615	GENERAL PURPOSE	501 (C)(3)	2,000.
TOLEDO-LUCAS CTY CARENET 3231 CENTRAL PARK W STE 200 TOLEDO, OH 43617-3009	GENERAL PURPOSE	501 (C)(3)	2,500.
TROOP NEED YOU PO BOX 758531 TOPEKA, KS 66675-8531	GENERAL PURPOSE	501 (C)(3)	5,000.
UNITED WAY OF GREATER TOLEDO ONE STRANAHAN SQ, SUITE 114 TOLEDO, OH 43604-1495	GENERAL PURPOSE	501 (C)(3)	5,000.
USO WORLD HEADQUARTERS P.O. BOX 96860 WASHINGTON, DC 20077-7677	GENERAL PURPOSE	501 (C)(3)	6,000.
UT FOUNDATION 2801 W BANCROFT TOLEDO, OH 43606	GENERAL PURPOSE	501 (C)(3)	4,000.
WOUNDED WARRIOR PROJECT 7020 SKINNER PKY, SUITE 100 JACKSONVILLE, FL 32256	GENERAL PURPOSE	501 (C)(3)	5,000.
YMCA 2009 SCHOLARSHIP 2100 S HOLLAND SYLVANIA RD MAUMEE, OH 43537	GENERAL PURPOSE	501 (C)(3)	2,000.

TOLEDO AREA HUMANE SOCIETY 1920 INDIAN WOOD CIRCLE MAUMEE, OH 43537	GENERAL PURPOSE	501 (C)(3)	2,500.
YWCA OF GREATER TOLEDO 1018 JEFFERSON AVE TOLEDO, OH 43624-1785	GENERAL PURPOSE	501 (C)(3)	8,000.
NATIONAL MULTIPLE SCLEROSIS SOCIETY P.O. BOX 398 MAUMEE, OH 43537	GENERAL PURPOSE	501 (C)(3)	2,500.
AURORA PROJECT 1035 N SUPERIOR ST TOLEDO, OH 43604	GENERAL PURPOSE	501 (C)(3)	2,500.
FOOD FOR THOUGHT 3540 SEAMAN RD OREGON, OH 43616	GENERAL PURPOSE	501 (C)(3)	5,000.
HOSPICE OF NORTHWEST OHIO 30000 EAST RIVER RD PERRYSBURG, OH 43551	GENERAL PURPOSE	501 (C)(3)	5,000.
FREEDOM ALLIANCE 22570 MARLEY COURT DULLES, VA 20166	GENERAL PURPOSE	501 (C)(3)	1,000.
KIDNEY FOUNDATION NW OHIO 3100 WEST CENTRAL TOLEDO, OH 43606	GENERAL PURPOSE	501 (C)(3)	2,500.
OLD NEWSBOYS GOODFELLOWS ASSOCIATION P.O. BOX 2032 TOLEDO, OH 43604	GENERAL PURPOSE	501 (C)(3)	1,000.
OHIO SPECIAL OLYMPICS INC 3303 WINCHESTER PIKE COLUMBUS, OH 43232	GENERAL PURPOSE	501 (C)(3)	1,000.

THE TKBW PRIVATE FOUNDATION C/O BRUCE WE

34-1903674

MUSTARD SEED OUTREACH MINISTRY

501 (C)(3) 5,000.

5420 302ND ST. TOLEDO, OH 43611 GENERAL PURPOSE

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

252,600.