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**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

**2009**

For calendar year 2009, or tax year beginning

, 2009, and ending

, 20

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

<b>Use the IRS label. Otherwise, print or type. See Specific Instructions.</b>	Name of foundation <b>Trustmark Foundation</b>		<b>A Employer identification number</b> <b>36-3330631</b>
	Number and street or P.O. box number if mail is not delivered to street address) Room/suite <b>400 Field Drive</b>		<b>B Telephone number (see page 10 of the instructions)</b> <b>847-615-1500</b>
	City or town, state, and ZIP code <b>Lake Forest, IL 60045</b>		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>
			<b>D</b> 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
<b>H</b> 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			<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <b>1,165,304</b>			<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
<b>J</b> Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____			
(Part I, column (d) must be on cash basis.)			

<b>Part I Analysis of Revenue and Expenses</b> (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)
<b>Revenue</b>	1 Contributions, gifts, grants, etc., received (attach schedule)	<b>22,841</b>			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	<b>157</b>	<b>157</b>		
	4 Dividends and interest from securities	<b>17,814</b>	<b>17,814</b>		
	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)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 <b>Total.</b> Add lines 1 through 11	<b>40,812</b>	<b>17,971</b>			
<b>Operating and Administrative Expenses</b>	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)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	<b>1,424</b>			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	<b>15</b>			<b>15</b>
	24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23	<b>1,439</b>			<b>15</b>
	25 Contributions, gifts, grants paid	<b>1,207,611</b>			<b>1,207,611</b>
26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	<b>1,209,050</b>			<b>1,207,626</b>	
27 Subtract line 26 from line 12:					
a <b>Excess of revenue over expenses and disbursements</b>	<b>(1,168,238)</b>				
b <b>Net investment income</b> (if negative, enter -0-)		<b>17,971</b>			
c <b>Adjusted net income</b> (if negative, enter -0-)					

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<b>Part II Balance Sheets</b>		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		
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .			<b>19,632</b>	<b>80,923</b>	<b>80,923</b>
	<b>2</b> Savings and temporary cash investments . . . . .			<b>2,313,910</b>	<b>1,084,381</b>	<b>1,084,381</b>
	<b>3</b> Accounts receivable ▶ . . . . .					
	Less: allowance for doubtful accounts ▶ . . . . .					
	<b>4</b> Pledges receivable ▶ . . . . .					
	Less: allowance for doubtful accounts ▶ . . . . .					
	<b>5</b> Grants receivable . . . . .					
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions) . . . . .					
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ . . . . .					
	Less: allowance for doubtful accounts ▶ . . . . .					
	<b>8</b> Inventories for sale or use . . . . .					
	<b>9</b> Prepaid expenses and deferred charges . . . . .					
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule)					
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .					
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .					
	<b>11</b> Investments—land, buildings, and equipment: basis ▶ . . . . .					
<b>Liabilities</b>	Less: accumulated depreciation (attach schedule) ▶ . . . . .					
	<b>12</b> Investments—mortgage loans . . . . .					
	<b>13</b> Investments—other (attach schedule) . . . . .					
	<b>14</b> Land, buildings, and equipment: basis ▶ . . . . .					
	Less: accumulated depreciation (attach schedule) ▶ . . . . .					
	<b>15</b> Other assets (describe ▶ . . . . . )					
	<b>16</b> <b>Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I) . . . . .			<b>2,333,542</b>	<b>1,165,304</b>	<b>1,165,304</b>
	<b>17</b> Accounts payable and accrued expenses . . . . .					
	<b>18</b> Grants payable . . . . .					
	<b>19</b> Deferred revenue . . . . .					
<b>Net Assets or Fund Balances</b>	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons					
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .					
	<b>22</b> Other liabilities (describe ▶ . . . . . )					
	<b>23</b> <b>Total liabilities</b> (add lines 17 through 22) . . . . .					
	<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>					
	<b>24</b> Unrestricted . . . . .					
	<b>25</b> Temporarily restricted . . . . .					
	<b>26</b> Permanently restricted . . . . .					
	<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 27 through 31.</b>					
	<b>27</b> Capital stock, trust principal, or current funds . . . . .					
	<b>28</b> Paid-in or capital surplus, or land, bldg., and equipment fund					
	<b>29</b> Retained earnings, accumulated income, endowment, or other funds					
	<b>30</b> <b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .					
	<b>31</b> <b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .			<b>2,333,542</b>	<b>1,165,304</b>	

<b>Part III Analysis of Changes in Net Assets or Fund Balances</b>			
<b>1</b>	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) . . . . .	<b>1</b>	<b>2,333,542</b>
<b>2</b>	Enter amount from Part I, line 27a . . . . .	<b>2</b>	<b>(1,168,238)</b>
<b>3</b>	Other increases not included in line 2 (itemize) ▶ . . . . .	<b>3</b>	
<b>4</b>	Add lines 1, 2, and 3 . . . . .	<b>4</b>	<b>1,165,304</b>
<b>5</b>	Decreases not included in line 2 (itemize) ▶ . . . . .	<b>5</b>	
<b>6</b>	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	<b>6</b>	<b>1,165,304</b>

**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.)
<b>1a</b>				
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
(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)	
<b>a</b>				
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
<b>a</b>				
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
<b>2</b> 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		<b>2</b>	
<b>3</b> 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			<b>3</b>	

**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.

<b>1</b> 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	1,232,918	2,161,143	0.5705
2007	1,212,416	1,413,721	0.8576
2006	1,098,372	1,613,274	0.6808
2005	838,592	1,095,931	0.7652
2004	702,538	1,120,060	0.6272
<b>2</b> Total of line 1, column (d)			<b>2</b> 3.5013
<b>3</b> 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			<b>3</b> 0.7003
<b>4</b> Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			<b>4</b> 1,659,411
<b>5</b> Multiply line 4 by line 3			<b>5</b> 1,162,086
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)			<b>6</b> 180
<b>7</b> Add lines 5 and 6			<b>7</b> 1,162,266
<b>8</b> Enter qualifying distributions from Part XII, line 4 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.			<b>8</b> 1,207,626

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

<b>1a</b>	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)			
<b>b</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	<b>1</b>		<b>180</b>
<b>c</b>	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>		
<b>3</b>	Add lines 1 and 2	<b>3</b>		<b>180</b>
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>		
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	<b>5</b>		<b>180</b>
<b>6</b>	<b>Credits/Payments:</b>			
<b>a</b>	2009 estimated tax payments and 2008 overpayment credited to 2009	<b>6a</b>		<b>700</b>
<b>b</b>	Exempt foreign organizations—tax withheld at source	<b>6b</b>		
<b>c</b>	Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>		
<b>d</b>	Backup withholding erroneously withheld	<b>6d</b>		
<b>7</b>	Total credits and payments. Add lines 6a through 6d	<b>7</b>		<b>700</b>
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	<b>8</b>		
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	<b>9</b>		
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	<b>10</b>		<b>520</b>
<b>11</b>	Enter the amount of line 10 to be: <b>Credited to 2010 estimated tax</b> <b>520</b> <b>Refunded</b>	<b>11</b>		

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> 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?		<input checked="" type="checkbox"/>
<b>b</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)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		<input checked="" type="checkbox"/>
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?		<input checked="" type="checkbox"/>
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ <u>N/A</u> (2) On foundation managers. ► \$ <u>N/A</u>		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ <u>N/A</u>		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		<input checked="" type="checkbox"/>
<b>3</b> Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		<input checked="" type="checkbox"/>
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?		<input checked="" type="checkbox"/>
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?	N/A	
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		<input checked="" type="checkbox"/>
<b>6</b> 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?	<input checked="" type="checkbox"/>	
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	<input checked="" type="checkbox"/>	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ► <u>Illinois</u>		
<b>b</b> If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i>	<input checked="" type="checkbox"/>	
<b>9</b> 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)? <i>If "Yes," complete Part XIV</i>		<input checked="" type="checkbox"/>
<b>10</b> Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		<input checked="" type="checkbox"/>

**Part VII-A Statements Regarding Activities (continued)**

<b>11</b>	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)	<b>11</b>		<input checked="" type="checkbox"/>
<b>12</b>	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	<b>12</b>		<input checked="" type="checkbox"/>
<b>13</b>	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	<b>13</b>	<input checked="" type="checkbox"/>	
<b>14</b>	The books are in care of ▶ <u>Karen Preusker</u> Telephone no. ▶ <u>847-283-4124</u> Located at ▶ <u>400 Field Drive, Lake Forest, IL</u> ZIP+4 ▶ <u>60045-2581</u>			
<b>15</b>	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here. <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶ <b>15</b>			

**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
<b>1a</b> 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? ( <b>Exception.</b> 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>b</b> If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>	<b>1b</b>	N/A
<b>c</b> 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?	<b>1c</b>	<input checked="" type="checkbox"/>
<b>2</b> 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)):		
<b>a</b> 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 type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____		
<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> 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.)	<b>2b</b>	N/A
<b>c</b> If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____		
<b>3a</b> 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 type="checkbox"/> No		
<b>b</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.)	<b>3b</b>	N/A
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>	<input checked="" type="checkbox"/>
<b>b</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?	<b>4b</b>	<input checked="" type="checkbox"/>

**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? ☐ Yes ☒ 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? ☐ Yes ☒ No**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
Schedule attached				

**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, Directors, Trustees, Foundation Managers, Highly Paid Employees, 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
<b>1</b> None	
<b>2</b>	
<b>3</b>	
<b>4</b>	

**Part IX-B** Summary of Program-Related Investments (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
<b>1</b> None	
<b>2</b>	
All other program-related investments. See page 24 of the instructions	
<b>3</b>	
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.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities . . . . .	<b>1a</b>	1,624,440
<b>b</b>	Average of monthly cash balances . . . . .	<b>1b</b>	60,241
<b>c</b>	Fair market value of all other assets (see page 24 of the instructions) . . . . .	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c) . . . . .	<b>1d</b>	1,684,681
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) . . . . .	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets . . . . .	<b>2</b>	
<b>3</b>	Subtract line 2 from line 1d . . . . .	<b>3</b>	1,684,681
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions) . . . . .	<b>4</b>	25,270
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	1,659,411
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5 . . . . .	<b>6</b>	82,971

**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.)

<b>1</b>	Minimum investment return from Part X, line 6 . . . . .	<b>1</b>	82,971
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5 . . . . .	<b>2a</b>	180
<b>b</b>	Income tax for 2009. (This does not include the tax from Part VI.) . . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b . . . . .	<b>2c</b>	180
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1 . . . . .	<b>3</b>	82,791
<b>4</b>	Recoveries of amounts treated as qualifying distributions . . . . .	<b>4</b>	
<b>5</b>	Add lines 3 and 4 . . . . .	<b>5</b>	82,791
<b>6</b>	Deduction from distributable amount (see page 25 of the instructions) . . . . .	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 . . . . .	<b>7</b>	82,791

**Part XII Qualifying Distributions** (see page 25 of the instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26 . . . . .	<b>1a</b>	1,207,626
<b>b</b>	Program-related investments—total from Part IX-B . . . . .	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes . . . . .	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required) . . . . .	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule) . . . . .	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	1,207,626
<b>5</b>	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) . . . . .	<b>5</b>	180
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4 . . . . .	<b>6</b>	1,207,446

**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
<b>1</b> Distributable amount for 2009 from Part XI, line 7 . . . . .				<b>82,791</b>
<b>2</b> Undistributed income, if any, as of the end of 2009:				
<b>a</b> Enter amount for 2008 only . . . . .			<b>-0-</b>	
<b>b</b> Total for prior years: 20____, 20____, 20____		<b>-0-</b>		
<b>3</b> Excess distributions carryover, if any, to 2009:				
<b>a</b> From 2004 . . . . .	<b>647,031</b>			
<b>b</b> From 2005 . . . . .	<b>784,301</b>			
<b>c</b> From 2006 . . . . .	<b>1,018,982</b>			
<b>d</b> From 2007 . . . . .	<b>1,143,092</b>			
<b>e</b> From 2008 . . . . .	<b>1,126,279</b>			
<b>f</b> <b>Total</b> of lines 3a through e . . . . .	<b>4,719,685</b>			
<b>4</b> Qualifying distributions for 2009 from Part XII, line 4: ► \$ <b>1,207,626</b>				
<b>a</b> Applied to 2008, but not more than line 2a . . . . .			<b>-0-</b>	
<b>b</b> Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		<b>-0-</b>		
<b>c</b> Treated as distributions out of corpus (Election required—see page 26 of the instructions) . . . . .	<b>-0-</b>			
<b>d</b> Applied to 2009 distributable amount . . . . .				<b>82,791</b>
<b>e</b> Remaining amount distributed out of corpus . . . . .	<b>1,124,835</b>			
<b>5</b> Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	<b>-0-</b>			<b>-0-</b>
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e. Subtract line 5 . . . . .	<b>5,844,520</b>			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .		<b>-0-</b>		
<b>c</b> 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 . . . . .		<b>-0-</b>		
<b>d</b> Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions . . . . .		<b>-0-</b>		
<b>e</b> Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions . . . . .			<b>-0-</b>	
<b>f</b> Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010 . . . . .				<b>-0-</b>
<b>7</b> 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) . . . . .	<b>-0-</b>			
<b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions) . . . . .	<b>647,031</b>			
<b>9</b> <b>Excess distributions carryover to 2010.</b> Subtract lines 7 and 8 from line 6a . . . . .	<b>5,197,489</b>			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2005 . . . . .	<b>784,301</b>			
<b>b</b> Excess from 2006 . . . . .	<b>1,018,982</b>			
<b>c</b> Excess from 2007 . . . . .	<b>1,143,092</b>			
<b>d</b> Excess from 2008 . . . . .	<b>1,126,279</b>			
<b>e</b> Excess from 2009 . . . . .	<b>1,124,835</b>			

**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 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	
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .					
<b>b</b> 85% of line 2a . . . . .					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .		N/A			
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:					
<b>a</b> "Assets" alternative test—enter:					
<b>(1)</b> Value of all assets . . . . .					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .					
<b>b</b> "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed . . . . .					
<b>c</b> "Support" alternative test—enter:					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) . . . . .					
<b>(3)</b> Largest amount of support from an exempt organization . . . . .					
<b>(4)</b> 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 page 28 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).)

None

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

None

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

Check here ☒ if the 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:

**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:

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

Form **990-PF** (2009)

## 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 (See page 28 of the instructions )
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue:					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments . . . . .					
3	Interest on savings and temporary cash investments			14	157	
4	Dividends and interest from securities . . . . .			14	17,814	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property . . . . .					
b	Not debt-financed property . . . . .					
6	Net rental income or (loss) from personal property					
7	Other investment income . . . . .					
8	Gain or (loss) from sales of assets other than inventory					
9	Net income or (loss) from special events . . . . .					
10	Gross profit or (loss) from sales of inventory . . . . .					
11	Other revenue: a _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal. Add columns (b), (d), and (e) . . . . .				17,971	
13	Total. Add line 12, columns (b), (d), and (e) . . . . .					17,971

(See worksheet in line 13 instructions on page 28 to verify calculations.)

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See page 29 of the instructions.)
---------------	---

[illegible]

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

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.

Karen Heuster  
Signature of officer or trustee

6-28-10  
Date

**Trustee**  
Title

**Sign Here**

**Paid  
Preparer's  
Use Only**

Preparer's signature 

Date \_\_\_\_\_

Check if self-employed ☐

Preparer's identifying  
number (see **Signature** on  
page 30 of the instructions)

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

EIN ►

Phone no

**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

Trustmark Foundation

Employer identification number

36 : 3330631

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☒ 501(c)( 3 ) (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 $\frac{1}{3}$ % 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).

Name of organization

Employer identification number

**Part I** Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Trustmark Insurance Company 400 Field Drive Lake Forest, IL 60045	\$ 22,841	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)



# SUN-TIMES MEDIA

## Certificates of Publication

State of Illinois – County of ☐ Cook ☐ Kane ☒ Lake ☐ McHenry  
☐ DuPage ☐ Will ☐ DeKalb ☐ Kendall ☐ Grundy

### PRIVATE FOUNDATION ANNUAL NOTICE

Pursuant to Section 6104 (d) of the Internal Revenue Code, notice is hereby given that the annual return for (calendar year) 2009. The Trustmark Foundation, a private foundation, is available at the foundation's principal office for inspection during regular business hours by any citizen who requests it within 180 days after the date of this publication. The foundation's principal office is located at 400 Field Drive, Lake Forest, IL 60045. The principal manager of the foundation is Nancy Eckrich, 847-283-3208. 985525 Pub 2/2/2010

Sun-Times Media, does hereby certify it has published the attached advertisements in the following secular newspapers. All newspapers meet Illinois Compiled Statute requirements for publication of Notices per Chapter 715 ILCS 5/0 01 et seq. R S 1874, P728 Sec 1, EFF July 1 1874 Amended By Laws 1959, P1494, and EFF July 17, 1959 Formerly Ill Rev Stat 1991, CH100, P1.

Note: Legal Notice appeared in the following checked positions

PUBLICATION DATE(S):

Feb 2, 2010

☐ The Beacon News

☐ The Courier News

☐ The Herald News

☒ The Lake County News-Sur

☐ The Naperville Sun

☐ The SouthTownStar

☐ The Chicago Sun-Times

☐ Pioneer Press/The Doings

### Weekly Papers

☐ Batavia Sun

☐ Bolingbrook Sun

☐ Downers Grove Sun

☐ Fox Valley Villages Sun

☐ Geneva Sun

☐ Glen Ellyn Sun

☐ Homer Township/Lockport/Lemont Sun

☐ Lincoln Way Sun

☐ Lisle Sun

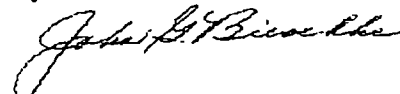
☐ Plainfield Sun

☐ St. Charles Sun

☐ Wheaton Sun

IN WITNESS WHEREOF, the undersigned, being duly authorized, has caused this Certificate to be signed and its official seal affixed at Aurora, Illinois

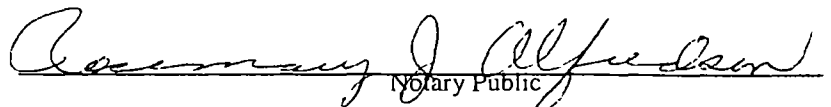
By



John G. Bieschke  
Legal Advertising Manager (Official Title)

Subscribed and sworn to before me this 2 Day of February A D 2010

By

  
Notary Public

**TRUSTMARK FOUNDATION, LAKE FOREST, ILLINOIS**  
**FEIN: 36-3330631**  
**FOR THE YEAR ENDED DECEMBER 31, 2009**  
**FORM 990-P, PART VIII, LINE 1, LIST OF ALL OFFICERS, DIRECTORS, TRUSTEES**

<b>Name and address</b>	<b>Title</b>	<b>Compensation</b>	<b>Contributions</b>	<b>Expenses</b>
Nancy Eckrich 400 Field Drive, Lake Forest, IL 60045	Chairperson Trustee/Nominee	-0-	-0-	-0-
Elizabeth O'Brien 400 Field Drive, Lake Forest, IL 60045	Trustee/Nominee	-0-	-0-	-0-
David McDonough 400 Field Drive, Lake Forest, IL 60045	Trustee/Nominee	-0-	-0-	-0-
Lloyd Sarrel 400 Field Drive, Lake Forest, IL 60045	Trustee/Nominee	-0-	-0-	-0-
Karen Preusker 400 Field Drive, Lake Forest, IL 60045	Trustee/Nominee	-0-	-0-	-0-
John Patton Hollow 400 Field Drive, Lake Forest, IL 60045	Trustee/Nominee	-0-	-0-	-0-
J Grover Thomas, Jr 400 Field Drive, Lake Forest, IL 60045	Trustee/Nominee	-0-	-0-	-0-
Kathy Machak 400 Field Drive, Lake Forest, IL 60045	Trustee/Nominee	-0-	-0-	-0-

**TRUSTMARK FOUNDATION - LAKE FOREST, ILLINOIS**

**FEIN: 36-3330631**

**YEAR ENDED DECEMBER 31, 2009**

**FORM 990-PF PART XV - LINE 3(a) GRANTS  
AND CONTRIBUTIONS PAID DURING YEAR**

<b><u>RECIPIENT</u></b>	<b><u>AMOUNT</u></b>	<b><u>Type of Entity</u></b>
<b><u>UNITED WAY</u></b>		
United Way of Lake County	\$ 140,000.00	501(c)(3)
	<b>\$ 140,000.00</b>	
<b><u>HEALTH/SAFETY</u></b>		
A Safe Place, Lake County, IL	\$ 30,000.00	501(c)(3)
Alexian Brothers-The Harbor, Lake County, IL	30,000.00	501(c)(3)
American Heart Association, Chicago, IL	10,000.00	501(c)(3)
Council Against Sexual Assault (CASA)	30,000.00	501(c)(3)
Catholic Charities of Lake County, IL	6,500.00	501(c)(3)
Coach Care/Almost Home Kids, Naperville, IL	5,000.00	501(c)(3)
Family Network, Inc.	5,000.00	501(c)(3)
Family Services, Lake County, IL	5,000.00	501(c)(3)
HealthReach, Lake County, IL	75,000.00	501(c)(3)
Interfaith House, Chicago, IL	30,000.00	501(c)(3)
Juvenile Diabetes Research Foundation	10,000.00	501(c)(3)
Lake County Haven	15,000.00	501(c)(3)
Lake County Partners, Libertyville, IL	11,000.00	501(c)(3)
Lake Forest Hospital	10,000.00	501(c)(3)
Lambs Farm, Libertyville, IL	5,000.00	501(c)(3)
March of Dimes	5,000.00	501(c)(3)
Midwest Palliative & Hospice Care Center, Glenview, IL	10,000.00	501(c)(3)
Mother's Trust Foundation, Lake County, IL	30,000.00	501(c)(3)
Northern Illinois Council on Alcoholism (NICASA)	30,000.00	501(c)(3)
Northern Illinois Food Bank	15,000.00	501(c)(3)
Omni Youth Services, Cook & Lake Counties, IL	30,000.00	501(c)(3)
Ronald McDonald House, Chicago, IL	5,000.00	501(c)(3)
Willow House, Chicago, IL	30,000.00	501(c)(3)
Youth & Family Counseling, Lake County, IL	27,000.00	501(c)(3)
Zacharias Sexual Abuse Center, Lake County, IL	30,000.00	501(c)(3)
	<b>\$ 489,500.00</b>	
<b><u>EDUCATION</u></b>		
Actuarial Foundation, Schaumburg, IL	\$ 10,000.00	501(c)(3)
Allendale Association Inc., Lake Villa, IL	5,000.00	501(c)(3)
College of Lake County Foundation, Grayslake, IL	5,000.00	501(c)(3)
Lake Forest Graduate School of Management, Lake Forest, IL	30,700.00	501(c)(3)
San Miguel Tebres Cordero School, Chicago, IL	5,000.00	501(c)(3)
Ralph J. Eckert Scholarship Foundation	81,125.00	501(c)(3)
	<b>\$ 136,825.00</b>	
<b><u>URBAN/CIVIC</u></b>		
Big Brothers/Big Sisters of Lake County	\$ 5,000.00	501(c)(3)
Boys & Girls Club of Lake County	5,000.00	501(c)(3)
Lake County Center for Independent Living	5,000.00	501(c)(3)
The SEDOL Foundation, Lake County, IL	5,000.00	501(c)(3)
YWCA of Lake County	2,500.00	501(c)(3)
YWCA of Evanston	2,500.00	501(c)(3)
	<b>\$ 25,000.00</b>	

**TRUSTMARK FOUNDATION - LAKE FOREST, ILLINOIS**

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YEAR ENDED DECEMBER 31, 2009

**FORM 990-PF PART XV - LINE 3(a) GRANTS  
AND CONTRIBUTIONS PAID DURING YEAR**

<b><u>RECIPIENT</u></b>	<b><u>AMOUNT</u></b>	<b><u>Type of Entity</u></b>
<b><u>CULTURAL</u></b>		
Ravinia Festival Association, Highland Park, IL	\$ 5,000.00	501(c)(3)
	<u>\$ 5,000.00</u>	
<b><u>SPECIAL PROGRAMS</u></b>		
Favorite Charity Program (See Attached)	\$ 60,264.85	501(c)(3)
IMPACT Project (Lake Forest Hospital)	79,900.51	501(c)(3)
Great Lakes Adaptive Sports Association, Lake Forest, IL	10,000.00	501(c)(3)
PADS Crisis Services, North Chicago, IL	5,000.00	501(c)(3)
University of South Carolina Educational Foundation	3,000.00	501(c)(3)
Women Business Leaders of the U.S. Health Care Industry Foundation, Washington, DC	8,000.00	501(c)(3)
Donor Designated & Undesignated Grants (See Attached)	214,829.86	501(c)(3)
Volunteer Grants	7,450.00	501(c)(3)
Gifts in Kind	22,841.00	501(c)(3)
	<u>\$ 411,286.22</u>	
<b>GRAND TOTAL</b>	<u><u>\$ 1,207,611.22</u></u>	

Contributions to the above organizations are used to further their exempt purposes

**TRUSTMARK FOUNDATION - LAKE FOREST, ILLINOIS**  
**FEIN: 36-3330631**  
**YEAR ENDED DECEMBER 31, 2009**  
**FORM 990-PF PART XV - LINE 3(a) GRANTS**  
**DONOR DESIGNATED & UNDESIGNATED GRANTS**

<u>ORGANIZATION</u>	<u>AMOUNT</u>
A Child's Place	7,500.00
All About Animals Resue	7,000.00
American Cancer Society	5,000 00
American Heart Association	3,000.00
American Macular Degenration Foundation, Northampton, MA	5,000.00
Baxter County Regional Hospital Foundation, Mountain Home, AR	3,000.00
Be the Match Foundation, Minneapolis, MN	7,500 00
Burdman Group, Youngstown, OH	5,000 00
Center for Living and Working, Worcester, MA	10,000.00
Conway Regional Health Foundation, Conway, AR	3,000 00
Downriver Community Services Center, MI	6,000.00
Family Advocate Program Inc., Boise, ID	5,000.00
Forgotten Harvest, Oak Park, MI	12,000.00
Gabriels Angel's, Phoenix, AZ	5,000.00
Georgia State University Foundation, Atlanta, GA	3,500.00
Golden String Inc.	5,000.00
Hope Worldwide, Wayne, PA	5,000.00
Hospice of Lancaster County, Lancaster, PA	5,000 00
Johnson County Regional Hospital Foundation, Clarksville, AR	3,000.00
Kennedy Krieger Foundation, Baltimore, MD	15,000.00
Lancaster General Healthcare Foundation	5,000.00
Literacy Council of Lancaster	3,500.00
Lutheran Church of the Resurrection, CA	500.00
Milagro House, Lancaster, PA	10,000.00
Ohio North East Health System, Youngstown, OH	5,000.00
Orlando Regional Healthcare Foundation, Orlando, FL	5,000.00
Recreation Unlimited Foundation, Ashley, OH	15,000.00
Rockhurst University, Kansas City, MO	10,000.00
Ronald McDonald House Charities of Eastern Wisconsin	10,000.00
Together We Cope, Tinley Park, IL	10,000.00
Truman Medical Center Charitable Foundation, Kansas City, MO	10,000.00
Tucson Children's Museum, Tucson, AZ	5,000.00
Turning Point Inc.	10,000.00
Washington Regional Medical Foundation, Fayetteville, AR	3,500.00
Water Street Rescue Mission Clinic	3,500.00
White River Health System Foundation, Batesville, AR	2,500.00
Reversal of uncashed contribution checks 2006-2008	(14,170.14)
<b>Total</b>	<b>\$ 214,829.86</b>

**TRUSTMARK FOUNDATION - LAKE FOREST, ILLINOIS**

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**YEAR ENDED DECEMBER 31, 2009**

**FORM 990-PF PART XV - LINE 3(a) GRANTS**

**FAVORITE CHARITIES PROGRAM**

<u>ORGANIZATION</u>	<u>AMOUNT</u>
A Safe Place P O Box 1067 Waukegan, IL 60079	1,850 65
African American Alumni Assoc of North Central College 544 LaSalle Street Buffalo Grove, IL	392 76
AIDS Foundation of Chicago 411 South Wells Chicago, IL 60607	2,146 09
Allendale Association Inc Grand Avenue Lake Villa, IL 60046	89 07
Alliance for Excellence Lake Bluff School Distict 65 Educational Foundation P.O Box 479 Lake Bluff, IL 60044	757 47
Alpine Center C/O Alpine Center Verdigre, NE 68783	957 84
Alzheimer Research On NE Ohio 1899 W Garfield Rd Columbiana, OH 44408	82 54
Alzheimers & Related Disorders 70 E Lake Chicago, IL 60601	201 93
American Cancer Society 77 E. Monroe, 13th Floor Chicago, IL 60603	27 08
American Cancer Society 525 N. Broad St Canfield, OH 44406	50 21
American Cancer Society 314 Good Dr. Lancaster, PA 17603	819 13
American Cancer Society 1300 N Skokie Hwy, Suite 104 Gurnee, IL 60031	123 27
American Cancer Society Lincolnshire-Lake County 100 Tri-State International, Suite 125 Lincolnshire, IL 60069	182 29
American Cancer Society 999 N Main Glen Elyn, IL 60138	122 12

**TRUSTMARK FOUNDATION - LAKE FOREST, ILLINOIS**

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**YEAR ENDED DECEMBER 31, 2009**

**FORM 990-PF PART XV - LINE 3(a) GRANTS**

**FAVORITE CHARITIES PROGRAM**

<u>ORGANIZATION</u>	<u>AMOUNT</u>
American Diabetes Association 30 N Michigan Ave Chicago, IL 60607	411 62
American Heart Association of Met Chicago 208 S. La Salle Street, Suite 900 Chicago, IL 60604	361.20
American Lung Association of Illinois 3000 Kelly Lane Springfield, IL 62708	177 60
Amyotrophic Lateral Sclerosis Southfield, MI	172.20
Animal Protection Association P.O. Box 18098 Chicago, IL 60618	53 25
Anti-Cruelty Society 510 N LaSalle Street Chicago, IL 60610	750 78
Antioch Upper Grade School Antioch, IL	52 72
Appalachian State University Foundation ASU Box 32007 Boone, NC 28608	160.35
Baypath Humane Society of Hopkinton, Inc Hopkinton, MA	105 00
Beatitude House 287 Lora Ave. Youngstown, OH 44505	120.12
Best Friends Animal Sanctuary Highway 89 Kanab, UT 84741	621 00
Big Brothers/Big Sisters of Lake County 3701 Grand Ave, Ste G Gurnee, IL 60031	142 81
Big Brothers and Sisters of Lancaster County 630 Janet Ave Lancaster, PA 17601	41 58
Boys & Girls Club of Chicago Chicago, IL	204.43
Boys/Girls Club of Hartford County 100 E Bel Air Ave. Aberdeen, MD 21001	396.00

**TRUSTMARK FOUNDATION - LAKE FOREST, ILLINOIS**

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**FORM 990-PF PART XV - LINE 3(a) GRANTS**

**FAVORITE CHARITIES PROGRAM**

<u>ORGANIZATION</u>	<u>AMOUNT</u>
Boys/Girls Club of Lancaster 333 Dauphin St Lancaster, PA 17602	461 56
Bradley Counseling Center P O Box 1088 Lake Villa, IL 60046	197 34
Butler University 4600 Sunset Blvd Indianapolis, IN 46208	516 55
Cancer Research Foundation 135 South La Salle, Suite 1950 Chicago, IL 60603	39.99
Caris Pregnancy Clinics 4811 Emerson Ave , Ste 110 Palatine, IL 60067	479.70
Carmel High School Foundation One Carmel Parkway Mundelein, IL 60060	310 31
Carroll Hospice Inc. 95 Carroll Street Westminster, DC 21157	197 26
Carthage College 2001 Alford Park Kenosha, WI 53140	444 38
Catholic Charities of Archdiocese of Chicago 126 N Des Plaines Chicago, IL 60661	2,522 21
Catholic Charities of Lake County 671 S Lewis Ave Waukegan, IL 60085	177.60
Catholic Charities of Kansas 2220 Central Ave. Kansas City, KS 66102	155 04
Catholic Social Services 197 E Gay St. Columbus, OH 43215	70 52
Chicago Botanic Garden 1000 Lake Cook Rd Glencoe, IL 60022	470.25
Children's Hospital Foundation MS 3050 P.O Box 1997 Milwaukee, WI 53201	366 57



**TRUSTMARK FOUNDATION - LAKE FOREST, ILLINOIS****FEIN: 36-3330631****YEAR ENDED DECEMBER 31, 2009****FORM 990-PF PART XV - LINE 3(a) GRANTS****FAVORITE CHARITIES PROGRAM**

<u>ORGANIZATION</u>	<u>AMOUNT</u>
Childrens Memorial Hospital 2300 Childrens Plaza Chicago, IL 60614	532 87
Christ Luthern Church 4519 Providence Rd. Charlotte, NC 28226	1,296 00
Clearbrook-Fairfax House IL	129 63
Colorado State University Foundation 502 University Service Center Fort Collins, CO 80523	79 65
Concordia College 275 N Syndicate St Paul, MN 54411	482 62
Cornerstone Community Outreach Whitehall, AL	885 87
Crohns & Colitis Foundation of America 386 Park Avenue South, 17th Floor New York, NY 10016	1,252.20
CROYA 400 Hastings Rd Lake Forest, IL 60045	1,244 40
Cystic Fibrosis of Milwaukee 2421 Mayfair R Wauwatosa, WI 53226	765 00
Daisy Nursery North Chicago, IL	52 72
DePaul University Office of Development 25 East Jackson, 12th Floor Chicago, IL 60604	268 20
Escca Evanson School Childrens' Association 1500 McDaniel Ave Evanston, IL 60201	176 67
Evanston YWCA Shelter for Battered Women 1215 Church Street Evanston, IL 60204	570.37
Feed the Children P O. Box 36 Oklahoma City, OK 73101	444 00
Focus on the Family Colorado Springs, CO 80995	632.99

**TRUSTMARK FOUNDATION - LAKE FOREST, ILLINOIS**  
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**YEAR ENDED DECEMBER 31, 2009**  
**FORM 990-PF PART XV - LINE 3(a) GRANTS**  
**FAVORITE CHARITIES PROGRAM**

<u>ORGANIZATION</u>	<u>AMOUNT</u>
Freedom from Hunger Davis, CA	183 30
Froedert Hospital Foundation 9200 W. Wisconsin Ave. Milwaukee, WI 53226	40 27
Gads Hill Center 1919 West Cullerton St Chicago, IL 60608	317 30
Gordon Tech High School 3633 N California Chicago, IL 60618	181 23
Greater Twin Cities United Way Minneapolis, MN	126.00
Habitat For Humanity, Lake County 315 N Utica Street Waukegan, IL 60085	958 50
Harrison United Methodist Church 15008 Lancaster Way Pineville, NC 28134	622 66
Hispanic Alliance For Career Enhancement 14 E Jackson Blvd, Suite 1310 Chicago, IL 60604	196 80
Hospice Alliance 3410 80th St Kenosha, WI 53142	195 70
Hospice of the Valley Phoenix, AZ	50 21
House of Charity Minneapolis, MN	440 32
Howard Brown Health Center 4025 N Sheridan Road Chicago, IL 06013	295 20
Huntingtons Disease Society of America IL- Chapter P.O Box 8383 Rolling Meadows, IL 60008	181.27
Kellogg Cancer Clinic 2650 Ridge Rd Evanston, IL 60208	141.00
Kellogg Graduate School of Management 2001 Sheridan Rd Evanston, IL 60208	211.12

**TRUSTMARK FOUNDATION - LAKE FOREST, ILLINOIS**

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**YEAR ENDED DECEMBER 31, 2009**

**FORM 990-PF PART XV - LINE 3(a) GRANTS**

**FAVORITE CHARITIES PROGRAM**

<u>ORGANIZATION</u>	<u>AMOUNT</u>
Lake County Council Against Sexual Assault 4275 Grand Avenue Gurnee, IL 60031	905.90
Lake County Haven 139 Ravine Forest Drive Lake Bluff, IL 60044	82.17
Lake Forest Graduate School of Management 1905 W Field Ct Lake Forest, IL 60045	2,415 60
Lambs Farm Rte 176 & I94 Libertyville, IL 60048	119 65
Make a Wish Foundation of Susquehanna Valley 1054 New Holland Ave Lancaster, PA 17601	41 58
March of Dimes Greater New York Chapter 233 Park Avenue South New York, NY 10003	88 80
Mater Dei High School 9th & Plums St Breese, IL 62230	357 60
Mercy Home for Boys and Girls 1140 West Jackson Blvd Chicago, IL 60607	355 20
Moody Bible Institute of Chicago Chicago, IL	82 54
Mt Carmel Foundation 793 W State St Columbus, OH 43222	86 40
Multiple Sclerosis Service Agency 5208 Mahoning Ave Youngstown, OH 44515	50 21
Mundelein High School 1350 W Hawley St. Mundelein, IL 60060	380 71
Myasthenia Graves Foundation Greater Chicago Area Chapter 13347 S Rexford St Blue Island, IL 60406	155 61
National Foundation for Rare Disorders 55 Kenosha Ave. PO Box 1968 Danbury, CT 06813	231.75

**TRUSTMARK FOUNDATION - LAKE FOREST, ILLINOIS**

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**FORM 990-PF PART XV - LINE 3(a) GRANTS**

**FAVORITE CHARITIES PROGRAM**

<u>ORGANIZATION</u>	<u>AMOUNT</u>
National Multiple Sclerosis Society - New York Chapter 733 Third Ave. New York, NY 10017	162 08
National Urea Cycle Disorder Foundation 4841 Hill Street La Canada, CA 91011	231 75
North Central College 30 N Brainard St. Naperville, IL 60540	369 48
North Park College 3225 W Foster Chicago, IL 60625	1,083 00
North Suburban United Way 3330 Dundee Rd , Ste N-6 Northbrook, IL 60062	102.65
Northwestern University 2020 Ridge Evanston, IL 60208	760 20
Omni Youth Services 1111 W. Lake Cook Rd Buffalo Grove, IL 60089	82 17
Open Arms Mission P O Box 79 Antioch, IL 60002	246 02
Orphans of the Storm 2200 N Riverwoods Rd Riverwoods, IL 60015	635 92
Pet Refuge 2300 West 6th St. Mishawaka, IN 46544	126 12
Pioneer Drum and Bugle Corps 4601 W. Holt Ave. Milwaukee, WI 53219	174 01
Project Forward Leap Foundation Philadelphia, PA	33 32
Rainbow Hospice Inc 444 N. Northwest Hwy, Ste. 145 Park Ridge, IL 60068	157 01
Reason Enough to Act 300 West High Street Elkhart, IN 46516	155 29

**TRUSTMARK FOUNDATION - LAKE FOREST, ILLINOIS**

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**FORM 990-PF PART XV - LINE 3(a) GRANTS**

**FAVORITE CHARITIES PROGRAM**

<u>ORGANIZATION</u>	<u>AMOUNT</u>
Rimland Services NSP 1265 Hartrey Ave. Evanston, IL 60202	216 00
Safe Harbor Humane Society 7811 60th Ave. Kenosa, WI 53142	140 24
Salvation Army 4056 N Pulaski Road Chicago, IL 60618	177.60
Salvation Army 106 W Exchange Freeport, IL 61032	22 60
Salvation Army 404 south Butrick St Waukegan, IL 60085	185 85
Save-A-Pet 31664 N Fairfield Rd Grayslake, IL 60030	2,041.39
Second Harvest Foodbank 1700 W Fond Du Lac Ave Milwaukee, WI 53205	337 54
Special Olympics Illinois Normal, IL	88.80
St Johns Luthern School 300 Jefferson St Algonquin, IL 60102	490 50
St Jude Childrens Hospital P O Box 50 Memphis, TN 38101	68 68
St Scholastic High School 7416 N. Ridge Chicago, IL 60645	181 23
Texas A&M Former Student Association 505 George Bush Dr. College Station, TX 77840	201 93
The Family Crisis Center Baltimore, MD	27.08
The Giving Tree Chicago, IL	82.54
The Rich Center for Autism 606 Wick Ave. Youngstown, OH 44502	50.21

**TRUSTMARK FOUNDATION - LAKE FOREST, ILLINOIS**

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**FORM 990-PF PART XV - LINE 3(a) GRANTS**

**FAVORITE CHARITIES PROGRAM**

<u>ORGANIZATION</u>	<u>AMOUNT</u>
The St Norbert College Annual Fund 100 Grant St. Depere, WI 54115	159 04
United Negro College Fund 55 East Monroe Street, Suite 1880 Chicago, IL 60603	162 00
University of Chicago 5801 S. Ellis Ave Chicago, IL 60637	211 12
University of Illinois Foundation Champaign, IL 61826	1,309 12
United Way of Franklin County 360 S 3rd Street Columbus, OH 43215	840.00
United Way of Kenosha County 3601 30th Ave , Suite 202 Kenosha, WI 53141	1,241 50
United Way of Lake County 330 S. Greenleaf Gurnee, IL 60031	4,809 21
United Way of McHenry County 4508 Prime Parkway Mc Henry, IL 60050	513.98
United Way of Metropolitan Chicago Chicago, IL	173 55
United Way of Pierce County P. O Box 2215 Tacoma, WA 98401	204.44
United Way of Racine County 818 8th St. Racine, WI 53403	145 62
Virginia Rowing Association P O Box 400852 Charlottesville, VA 22904	378 00
WTTW TV 5400 N St Louis Ave Chicago, IL 60625	921 96
Wabash College P O Box 352 Crawfordsville, IN 47933	909 00
Waldorf School Association of Chicago 1300 W Loyola Ave. Chicago, IL 60626	457 35

**TRUSTMARK FOUNDATION - LAKE FOREST, ILLINOIS**

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**FORM 990-PF PART XV - LINE 3(a) GRANTS**

**FAVORITE CHARITIES PROGRAM**

<u>ORGANIZATION</u>	<u>AMOUNT</u>
Western Illinois University c/o Alumni Fund Macomb, IL 61455	528 39
Willow House 80 Oakwood Ln Lincolnshire, IL 60069	310 31
Willowglen Academy Arcade Group House 701 W Lamm Rd Freeport, IL 60132	176.67
Wisconsin 4-H Foundation, Inc Bristol Strivers P.O Box 550 Bristol, WI 53104	417 57
Wisconsin Humane Society 4500 W Wisconsin Ave Milwaukee, IL 53208	207.40
Womens Horizon P O Box 792 Kenosha, WI 53141	202 48
YWCA of Greater Chicago 180 North Wabash Chicago, IL 60601	982 50
Zion Childrens Service 2635 Gabriel Ave Zion, IL 60099	82 25
<b>Total</b>	<b><u><u>60,264.85</u></u></b>

TRUSTMARK FOUNDATION, LAKE FOREST, ILLINOIS  
FEIN: 36-3330631  
FOR THE YEAR ENDED DECEMBER 31, 2009  
FORM 990-PF

PART 1, LINE 18, TAXES

Excise Tax Payments	\$ 1,424
Excise Tax Refund	
	<hr/>
Total taxes	<u>\$ 1,424</u>

PART 1, LINE 23, OTHER EXPENSES

Annual filing fee	\$ 15
Miscellaneous	-
	<hr/>
Total other expenses	<u>\$ 15</u>