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

2009

Department of the Treasury
Internal Revenue Service

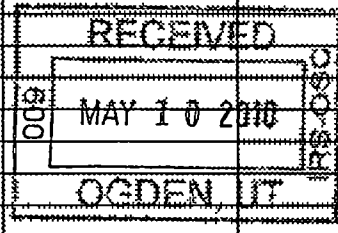
Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2009, or tax year beginning , 2009, **and ending** , 20

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

Use the IRS label. Otherwise, print or type.	Name of foundation THE THEUERKORN FOUNDATION	A Employer identification number 38-3330001
See Specific Instructions.	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite 38148 LAKESHORE DRIVE	B Telephone number (see instructions) 586-899-0483
	City or town, state, and ZIP code HARRISON TOWNSHIP MI 48045	C If exempt. application is pending, check here <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 187,658.	J 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.)	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)				
1 Contributions, gifts, grants, etc., received (attach schedule)				
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
3 Interest on savings and temp. cash investments				
4 Dividends and interest from securities	5,122.	5,122.		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	-15,381.			
b Gross sales price for all assets on line 6a	75,727.			
7 Capital gain net income (from Part IV, line 2)				
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less rtns. & allowances				
b Less: Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	-10,259.	5,122.		
Operating and Administrative Expenses				
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)	1,300.	650.		650.
c Other professional fees (attach schedule)	603.	603.		
17 Interest				
18 Taxes (attach schedule) (see the instructions)	-158.	-158.		
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)	20.			20.
24 Total operating and administrative expenses. Add lines 13 through 23	1,765.	1,095.		670.
25 Contributions, gifts, grants paid	10,220.			10,220.
26 Total expenses and disbursements. Add lines 24 and 25	11,985.	1,095.		10,890.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-22,244.			
b Net investment income (if neg., enter -0-)		4,027.		
c Adjusted net income (if neg., enter -0-)				



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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instr.)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash -- non-interest-bearing	11,626.	8,520.	8,520.
	2	Savings and temporary cash investments			
	3	Accounts receivable			
		Less allowance for doubtful accounts			
	4	Pledges receivable			
		Less allowance for doubtful accounts			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7	Other notes and loans receivable (attach schedule)			
		Less allowance for doubtful accounts			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments -- U.S. and state govt. obligations (attach schedule)			
	b	Investments -- corporate stock (attach schedule)	147,570.	120,106.	112,997.
	c	Investments -- corporate bonds (attach schedule)	50,721.	49,971.	54,983.
	11	Investments -- land, buildings, and equipment, basis			
	Less accumulated depreciation (attach schedule)				
12	Investments -- mortgage loans				
13	Investments -- other (attach schedule)				
14	Land, buildings, and equipment basis				
	Less accumulated depreciation (attach schedule)				
15	Other assets (describe COMMODITIES)		9,077.	11,158.	
16	Total assets (to be completed by all filers -- see the instructions. Also, see page 1, item I)	209,917.	187,674.	187,658.	
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 (attach schedule)			
	22	Other liabilities (describe)			
	23	Total liabilities (add lines 17 through 22)			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input type="checkbox"/>				
	and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/>				
	and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
28	Paid-in or capital surplus, or land, bldg., and equipment fund				
29	Retained earnings, accumulated income, endowment, or other funds	209,917.	187,674.		
30	Total net assets or fund balances (see the instruction)	209,917.	187,674.		
31	Total liabilities and net assets/fund balances (see the instructions)	209,917.	187,674.		

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)	1 209,917.
2	Enter amount from Part I, line 27a	2 -22,244.
3	Other increases not included in line 2 (itemize) ROUNDING	3 1.
4	Add lines 1, 2, and 3	4 187,674.
5	Decreases not included in line 2 (itemize)	5
6	Total net assets or fund balances at end of year (line 4 minus line 5) -- Part II, column (b), line 30	6 187,674.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P -- Purchase D -- Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PUBLICLY TRADED SECURITIES	P	VARIOUS	VARIOUS
b PUBLICLY TRADED SECURITIES	P	VARIOUS	VARIOUS
c CAPITAL GAIN DIVIDENDS			
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 20,889.		19,045.	1,844.
b 54,756.		72,063.	-17,307.
c 82.			82.
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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	
a			1,844.
b			-17,307.
c			82.
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	-15,381.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see the instructions). If (loss), enter -0- in Part I, line 8		3	0.

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.

(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	13,605.	208,853.	0.0651
2007	15,106.	249,528.	0.0605
2006	12,120.	233,404.	0.0519
2005	11,620.	222,088.	0.0523
2004	11,000.	203,011.	0.0542

2 Total of line 1, column (d)	2	0.2841
3 Average distribution ratio for the 5-year base period--divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.0568
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	164,842.
5 Multiply line 4 by line 3	5	9,367.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	40.
7 Add lines 5 and 6	7	9,407.
8 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.	8	10,890.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> & 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	40.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3 Add lines 1 and 2	3	40.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	40.
6 Credits/Payments:		
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	80.
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	80.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	40.
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax 40. Refunded 0.	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 the 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. ▶ \$ _____ (2) On foundation managers. ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		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 the instructions) ▶ MICHIGAN		
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

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 the 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>MR. GARY THEUERKORN</u> Telephone no. ▶ <u>586-899-0483</u> Located at ▶ <u>38148 LAKESHORE DRIVE, HARRISON TWP, MI</u> ZIP+4 ▶ <u>48045</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041- Check here. ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instructions)? Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20 __, 20 __, 20 __, 20 __		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement -- see the instructions.)	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20 __, 20 __, 20 __, 20 __		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

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 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 the instructions)? Yes No
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

5b			
6b			X
7b			

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

1 List all officers, directors, trustees, foundation managers and their compensation (see 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 comp.	(e) Expense account, other allowances
GARY THEUERKORN 38148 LAKESHORE DRIVE	PRES 1	0.		
DAVID THEUERKORN 8400 FOREST DRIVE	TREAS 1	0.		
SANDY THEUERKORN 38148 LAKESHORE DRIVE HARRISON TWP, MI 48045	SECR 1	0.		
		0.		

2 Compensation of five highest-paid employees (other than those included on line 1 -- see 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 0.

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 the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services ▶		

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount	
1 N/A		
2		
3 All other program-related investments. See the instructions.		
Total. Add lines 1 through 3 ▶		0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	159,083.
b	Average of monthly cash balances	1b	8,269.
c	Fair market value of all other assets (see the instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	167,352.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	167,352.
4	Cash deemed held for charitable activities. Enter 1/2% of line 3 (for greater amount, see the instructions)	4	2,510.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	164,842.
6	Minimum investment return. Enter 5% of line 5	6	8,242.

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

1	Minimum investment return from Part X, line 6	1	8,242.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	40.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	40.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	8,202.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	8,202.
6	Deduction from distributable amount (see the instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	8,202.

Part XII Qualifying Distributions (see the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.--total from Part I, column (d), line 26	1a	10,890.
b	Program-related investments--total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	10,890.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see the instructions)	5	40.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	10,850.

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 the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				8,202.
2 Undistributed income, if any, as of the end of 2009:				
a Enter amount for 2008 only			0.	
b Total for prior yrs: 20__ ,20__ ,20__		0.		
3 Excess distrib. carryover, if any, to 2009:				
a From 2004	1,041.			
b From 2005	899.			
c From 2006	767.			
d From 2007	3,280.			
e From 2008	3,264.			
f Total of lines 3a through e	9,251.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ \$ <u>10,890.</u>				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required -- see instructions)		0.		
c Treated as distributions out of corpus (Election required -- see the instructions)	0.			
d Applied to 2009 distributable amount				8,202.
e Remaining amount distributed out of corpus	2,688.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)				0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	11,939.			
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 the instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount -- see the instructions			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see the instructions)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see the instructions)	1,041.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	10,898.			
10 Analysis of line 9:				
a Excess from 2005	899.			
b Excess from 2006	767.			
c Excess from 2007	3,280.			
d Excess from 2008	3,264.			
e Excess from 2009	2,688.			

Part XIV Private Operating Foundations (see 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				(e) Total
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	
2a 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					0 .

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).)

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 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:

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE ATTACHED LIST				10,220.
Total ► 3a				10,220.
b Approved for future payment NONE				
Total ► 3b				0.

**THE THEUERKORN FOUNDATION
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PART I - LINE 4 - DIVIDENDS AND INTEREST FROM SECURITIES

CHARLES SCHWAB :	
TOTAL DIVIDENDS	5,204
CAPITAL GAIN DIVIDENDS	<u>82</u>
ORDINARY DIVIDENDS	<u>5,122</u>

PART I - LINE 6a - NET GAIN OR (LOSS) FROM SALE OF ASSETS

CHARLES SCHWAB :	
GAIN (LOSS) ON PUBLICLY TRADED SECURITIES	(15,463)
CAPITAL GAIN DIVIDENDS	<u>82</u>
TOTAL	<u>(15,381)</u>

PART I - LINE 16b - ACCOUNTING FEES

TAX PREPARATION FEES	<u>1,300</u>
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PART I - LINE 16C - OTHER PROFESSIONAL FEES

INVESTMENT MANAGEMENT FEES	<u>603</u>
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PART I - LINE 18 - TAXES

FEDERAL EXCISE TAX REFUND	(229)
FOREIGN TAX	<u>71</u>
TOTAL	<u>(158)</u>

PART I - LINE 23 - OTHER EXPENSES

STATE OF MICHIGAN ANNUAL FILING FEE	<u>20</u>
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PLANTE MORAN FINANCIAL ADVISORS
REALIZED GAINS AND LOSSES
The Theuerkorn Foundation
Charles Schwab #8769-3582
From 01-01-09 Through 12-31-09

Open Date	Close Date	Quantity	Security	Proceeds	Amort. or Accretion	Cost Basis	Gain Or Loss	
							Short Term	Long Term
01-15-09	09-02-09	637 4500	PIMCO Diversified Income Instl	6,385		5,545	840	
10-23-08	01-15-09	554 0940	PIMCO Total Return Instl	5,684		5,700	-16	
12-09-08	09-09-09	928 9980	Vanguard Intern Investment Grade Investor	8,820		7,800	1,020	
TOTAL SHORT-TERM				20,889		19,045	1,844	
12-20-06	05-29-09	57 3850	Artisan International	966		1,648		-681
12-20-06	05-29-09	10 7190	Artisan International	181		308		-127
05-07-04	05-29-09	456 7100	Artisan International	7,691		8,582		-891
		524 8140		8,838		10,537	0	-1,699
09-19-07	01-15-09	289 6660	PIMCO Developing Local Markets Instl	2,400		3,245		-846
11-30-05	01-15-09	684 1330	PIMCO Developing Local Markets Instl	5,668		7,000		-1,332
		973 7990		8,068		10,245	0	-2,178
05-07-04	07-10-09	449 0070	PIMCO Real Return Instl	4,610		5,000		-390
01-04-05	01-15-09	126 8400	PIMCO Total Return Instl	1,301		1,354		-53
10-26-07	03-24-09	281 8490	Thornburg International Value	4,985		10,742		-5,757
04-13-99	01-15-09	93 4730	Vanguard Index 500 Signal	5,985		9,660		-3,675
04-13-99	05-29-09	32 6170	Vanguard Index 500 Signal	2,283		3,371		-1,088
03-26-99	05-29-09	0 8122	Vanguard Index 500 Signal	57		80		-23
03-26-99	05-29-09	0 1053	Vanguard Index 500 Signal	7		10		-3

Your cost accounting for income tax purposes may differ from this report. See your tax advisor.

PLANTE MORAN FINANCIAL ADVISORS
REALIZED GAINS AND LOSSES
The Theuerkorn Foundation
Charles Schwab #8769-3582
From 01-01-09 Through 12-31-09

Open Date	Close Date	Quantity	Security	Proceeds	Amort. or Accretion	Cost Basis	Gain Or Loss	
							Short Term	Long Term
03-26-99	05-29-09	1 2637	Vanguard Index 500 Signal	88		124		-35
12-22-98	05-29-09	0 1900	Vanguard Index 500 Signal	13		18		-4
12-22-98	05-29-09	0 7626	Vanguard Index 500 Signal	53		70		-17
12-22-98	05-29-09	1 6523	Vanguard Index 500 Signal	116		152		-37
01-04-05	05-29-09	33 8118	Vanguard Index 500 Signal	2,367		3,068		-701
01-04-05	09-08-09	43 3284	Vanguard Index 500 Signal	3,395		3,932		-537
06-26-98	09-08-09	0 9042	Vanguard Index 500 Signal	71		79		-8
05-15-98	09-08-09	159 7974	Vanguard Index 500 Signal	12,520		13,622		-1,102
		368 7180		26,955		34,185	0	-7,230
TOTAL LONG-TERM				54,756		72,063		-17,307
TOTAL REALIZED GAIN/LOSS				75,645	0	91,108	1,844	-17,307

Your cost accounting for income tax purposes may differ from this report See your tax advisor

**THE THEUERKORN FOUNDATION
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PART II - LINE 10b - CORPORATE STOCK

	<u>BOOK VALUE</u>	<u>FAIR MARKET VALUE</u>
VANGURD INDEX 500 SIGNAL	33,492	33,767
T. ROWE PRICE MID-CAP GROWTH	10,092	12,577
DFA US SMALL CAP VALUE	4,423	5,083
VANGUARD INFLATION-PROTECTED SECURITIES	5,000	5,179
COLUMBIA INTERNATIONAL VALUE CI Z	8,000	9,086
MAINSTAY ICAP SELECT EQUITY I	13,000	10,003
TOUCHSTONE SANDS CAPITAL INSTITUTIONAL GROWTH	13,000	12,521
THORNBURG INTERNATIONAL VALUE	7,258	4,832
HARBOR INTERNATIONAL INSTITUTIONAL	19,000	13,311
CRM SMALL CAP VALUE INSTITUTIONAL	4,000	4,378
VANGUARD EXPLORER INVESTOR SHARES	2,841	2,260
	<u>120,106</u>	<u>112,997</u>

PART II - LINE 10C - CORPORATE BONDS

	<u>BOOK VALUE</u>	<u>FAIR MARKET VALUE</u>
PIMCO REAL RETURN INSTITUTIONAL	29,222	29,690
PIMCO DIVERSIFIED INCOME INSTITUTIONAL	1,455	1,775
BLACKROCK GLOBAL ALLOCATION CI I	6,294	6,683
CALAMOS GROWTH & INCOME FUND CI I	5,000	6,658
LOOMIS SAYLES STRATEGIC INCOME Y	8,000	10,177
	<u>49,971</u>	<u>54,983</u>

PART II - LINE 15 - COMMODITIES

	<u>BOOK VALUE</u>	<u>FAIR MARKET VALUE</u>
SPDR GOLD TRUST SHARES	3,077	4,078
CREDIT SUISSE COMMODITY RETURN STRATEGY	6,000	7,080
	<u>9,077</u>	<u>11,158</u>

**THE THEUERKORN FOUNDATION
RETURN OF PRIVATE FOUNDATION
FORM 990-PF**

**PART XV - LINE 3a - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR
2009**

RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
AMERICAN LUTHERAN CHURCH 38705 MULBERRY CLINTON TOWNSHIP, MI 48036	PUBLIC CHARITY	CHRISTIAN OUTREACH	\$ 728
ST. PAUL'S CHURCH FOR HOMELESS WEEK 147 LAKESHORE DRIVE GROSSE POINTE FARMS, MI 48236	PUBLIC CHARITY	FOOD AND SHELTER FOR HOMELESS FAMILIES	500
SPECIAL DREAMS FARM P.O. BOX 741 NEW BALTIMORE, MI 48047	PUBLIC CHARITY	RESIDENCE FARM FOR DEVELOPMENTALLY ADULTS	1,000
TRAVERSE CITY CHRISTIAN SCHOOLS 753 EMERSON ROAD TRAVERSE CITY, MI 49686	PUBLIC CHARITY	PROMOTE CHRISTIAN EDUCATION AND IDEALS	3,000
TRINITY LUTHERAN SCHOOL 38900 HARPER AVENUE CLINTON TOWNSHIP, MI 48036	PUBLIC CHARITY	PROMOTE CHRISTIAN EDUCATION AND IDEALS	3,000
HABITAT FOR HUMANITY 130 N. GROESBECK HIGHWAY MT. CLEMENS, MI 48043	PUBLIC CHARITY	PROVIDE AFFORDABLE HOUSES FOR VERY LOW INCOME FAMILIES	1,000
TRINITY LUTHERAN FOOD PANTRY 38900 HARPER AVENUE CLINTON TOWNSHIP, MI 48036	PUBLIC CHARITY	PROVIDE FOOD FOR LOW INCOME FAMILIES IN MACOMB COUNTY	992
			<u>\$ 10,220</u>