Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning , 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. See Specific Instructions.

Name of foundation: ANNA PAULINA FOUNDATION

Number and street (or P O box number if mail is not delivered to street address) | Room/suite: 3400 W. BRISTOL RD

City or town, state, and ZIP code: FLINT, MI 48507-3112

A Employer identification number: 38-6061335

B Telephone number (see page 10 of the instructions): 810-238-3685

C If exemption application is pending, check here ▶ ☐

D 1 Foreign organizations, check here ▶ ☐
2 Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

H Check type of organization: ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶ $ 12,620,704

J Accounting method: ☑ Cash ☐ Accrual
☐ Other (specify)
(Part I, column (d) must be on cash basis.)

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions).)*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	1,229,481			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	683,261	683,261		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	(1,021,209)			
	b	Gross sales price for all assets on line 6a 2,340,361				
	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	**Total.** Add lines 1 through 11	891,533	683,261		
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)				
	c	Other professional fees (attach schedule) Investment Fees	10,736			10,736
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions)	16,422			16,422
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule) MI Corp Update	20			20
	24	**Total operating and administrative expenses.** Add lines 13 through 23				
	25	Contributions, gifts, grants paid	883,311			883,311
	26	**Total expenses and disbursements.** Add lines 24 and 25	910,489	0	0	910,489
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	(18,956)			
	b	**Net investment income** (if negative, enter -0-)		683,261		
	c	**Adjusted net income** (if negative, enter -0-)			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 instructions)	Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets 1	Cash—non-interest-bearing	1,353,917	1,140,316	1,140,316
2	Savings and temporary cash investments	400,533	143,488	143,488
3	Accounts receivable ▶ Sunset Hills Association PD 1-1-10			
	Less: allowance for doubtful accounts ▶	0	105,596	105,596
4	Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)			
7	Other notes and loans receivable (attach schedule) ▶			
	Less allowance for doubtful accounts ▶			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10a	Investments—U S. and state government obligations (attach schedule)			
b	Investments—corporate stock (attach schedule)	11,158,919	2,554,262	2,323,445
c	Investments—corporate bonds (attach schedule)	850,312	9,801,063	8,907,859
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 ▶)			
16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	13,763,681	13,744,725	12,620,704
Liabilities 17	Accounts payable and accrued expenses	0	0	
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)	0	0	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
24	Unrestricted			
25	Temporarily restricted			
26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
27	Capital stock, trust principal, or current funds			
28	Paid-in or capital surplus, or land, bldg., and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds			
30	**Total net assets or fund balances** (see page 17 of the instructions)	13,763,681	13,744,725	
31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	13,763,681	13,744,725	

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	13,763,681
2	Enter amount from Part I, line 27a	2	(18,956)
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	13,744,725
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	13,744,725

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a				
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e				

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				
b				
c				
d				
e				

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 } 2

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):
If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions).
If (loss), enter -0- in Part I, line 8 . . . 3

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☐ No
If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see page 18 of the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	900,943	9,974,991	9.03%
2007	1,021,680	12,349,390	8.27%
2006	442,600	12,245,493	3.61%
2005	886,480	11,391,035	7.78%
2004	956,735	11,336,363	8.44%

2	**Total** of line 1, column (d) . . .	2	37.13%
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	7.43%
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 . . .	4	10,541,115
5	Multiply line 4 by line 3 . . .	5	783,205
6	Enter 1% of net investment income (1% of Part I, line 27b) . . .	6	6,833
7	Add lines 5 and 6 . . .	7	790,038
8	Enter qualifying distributions from Part XII, line 4 . . .	8	910,489

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ____ (attach copy of letter if necessary—see instructions)				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b			1	6,833
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			2	0
3	Add lines 1 and 2			3	6,833
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			4	0
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-			5	6,833
6	Credits/Payments:				
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	12,800		
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	12,800
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached			8	0
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	0
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	5,967
11	Enter the amount of line 10 to be: **Credited to 2010 estimated tax** ▶ 5,967 **Refunded** ▶			11	0

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		✓
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)?	1b		✓
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		✓
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ 0 **(2)** On foundation managers. ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		✓
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		✓
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		✓
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		N/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		✓
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	✓	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV*	7	✓	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of 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*	8b	✓	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		✓
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10	✓	

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

		Line	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		✓
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✓	

Website address ▶ None

14 The books are in care of ▶ A. J. Koegel Telephone no. ▶ 810-238-3685
Located at ▶ 3400 W. Bristol Rd, Flint, MI ZIP+4 ▶ 48507-3112

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041**—Check here . . . N/A ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year . . . . ▶ 15 N/A

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

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

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

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

5a	During the year did the foundation pay or incur any amount to:		
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No		
	(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No		
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (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)?	**5b**	N/A
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No		
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? *If "Yes" to 6b, file Form 8870.*	**6b**	✓
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No		
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**	N/A

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

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

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

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
1	
2	
3	
4	

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
1	
2	
All other program-related investments See page 24 of the instructions 3	
Total. Add lines 1 through 3 ▶	

Part X **Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	9,861,734
b	Average of monthly cash balances	1b	734,310
c	Fair market value of all other assets (see page 24 of the instructions)	1c	105,596
d	**Total** (add lines 1a, b, and c)	1d	10,701,640
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	10,701,640
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	160,525
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	10,541,115
6	**Minimum investment return.** Enter 5% of line 5	6	527,056

Part XI **Distributable Amount** (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6			1	527,056
2a	Tax on investment income for 2009 from Part VI, line 5	2a	6,833		
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	0		
c	Add lines 2a and 2b			2c	6,833
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	520,223
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	520,223
6	Deduction from distributable amount (see page 25 of the instructions)			6	0
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	520,223

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes.		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	910,489
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	910,489
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	0
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	910,489

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see page 26 of the instructions)

			(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1	Distributable amount for 2009 from Part XI, line 7					520,223
2	Undistributed income, if any, as of the end of 2009:					
a	Enter amount for 2008 only				0	
b	Total for prior years. 20___,20___,20___			0		
3	Excess distributions carryover, if any, to 2009:					
a	From 2004	396,700				
b	From 2005	335,050				
c	From 2006	0				
d	From 2007	434,384				
e	From 2008	387,147				
f	**Total** of lines 3a through e		1,553,281			
4	Qualifying distributions for 2009 from Part XII, line 4: ▶ $ 910,489					
a	Applied to 2008, but not more than line 2a					
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)					
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions)		0			
d	Applied to 2009 distributable amount					910,489
e	Remaining amount distributed out of corpus		390,266			
5	Excess distributions carryover applied to 2009 *(If an amount appears in column (d), the same amount must be shown in column (a).)*		0			0
6	**Enter the net total of each column as indicated below:**					
a	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5		1,943,547			
b	Prior years' undistributed income. Subtract line 4b from line 2b					
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed					
d	Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions					
e	Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions					
f	Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010					0
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)					
8	Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)		396,700			
9	**Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a		1,546,847			
10	Analysis of line 9:					
a	Excess from 2005	335,050				
b	Excess from 2006	0				
c	Excess from 2007	434,384				
d	Excess from 2008	387,147				
e	Excess from 2009	390,266				

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 . . . . ▶ N/A

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			
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
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					

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:

N/A

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

N/A

c Any submission deadlines:

N/A

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

N/A

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 for detail.				
Charitable				**124,961.00**
Educational				**753,500.00**
Religious				**4,850.00**
Total . . . . ▶ **3a**				**883,311**
b *Approved for future payment*				
Total . . . . ▶ **3b**				**0**

Part XVI-A Analysis of Income-Producing Activities

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 N/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					
4 Dividends and interest from securities					
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)					

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13

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

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

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)
N/A	

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		
	(2) Other assets	1a(2)		
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)		
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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
Sunset Hills Association	**501(c)(13)**	**Contributions prior to 2008, but none in 2008 and 2009**

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

John C. Koegel — Signature of officer or trustee — John C. Koegel
6-4-10 — Date
President — Title

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

Anna Paulina Foundation - 2009
EIN 38-6061335

Form 990-PF (2009)

CHARITABLE		
Alzheimer's Disease Research	500.00	P O Box 1950 Clarksburg, MD 20871-1950
American Forests	500 00	P O Box 2000, Washington, DC 20077-4244
American Lung Association	500 00	12741 Saginaw St , Grand Blanc, MI 48439
American Red Cross	1,000 00	1401 S Grand Traverse, Flint, MI 48503
American Symphony Orchestra League	100.00	33 W 60th St, 5th Floor, New York, NY 10023-7905
Arthritis Foundation MI Chapter	500.00	1050 Wilshire Dr., Ste. 302 Troy, MI 48084
BBB Wise Giving Alliance	100.00	P O Box 1808, Merrifield, VA 22116-8008
Capital Research Center	100.00	1513 16th Street NW, Washington, DC 20036
Central Asian Institute	1,000.00	P O Box 7209, Bozeman, MT 49771
Coalition to Salute American Heroes	250 00	P O Box 96440, Washington, DC 20090
Community Foundation of Greater Flint	250.00	500 S. Saginaw St, Flint, MI 48502
Crim Fitness Foundation	1,000.00	452 S. Saginaw St., Suite 1, Flint, MI 48502
Doctors Without Borders	250.00	P O Box 5023, Hagerstown, MD 21741-5023
Downtown Outreach Ministry	2,000.00	414 W Court St, Flint, MI 48503
Engender Health	250.00	440 Ninth Ave, 12th Floor, New York, NY 10117-2783
Flint Cultural Center Corporation	26,661.00	817 E. Kearsley St , Flint, MI 48503
Flint Institute of Arts	10,000.00	1120 E. Kearsley St , Flint, MI 48503
Flint River Watershed Coalition	500.00	432 N. Saginaw St , Suite 238, Flint, MI 48502
Free Medical Clinic of Genesee County	5,000.00	2437 Welch Blvd., Flint, MI 48504-6400
Friends of Flint Youth Theater	500.00	1220 E Kearsley St , Flint, MI 48503
Friends of For-Mar Foundation	250.00	2142 N Genesee Rd, Burton, MI 48509
Friends of Sloan Museum	250.00	1221 E Kearsley St., Flint, MI 48503
Girl Scouts Fair Winds Council	1,500 00	42804 Garfield, Clinton Township, MI 48038
Goodwill Industries of Mid-Michigan	500.00	501 S Averill St., Flint, MI 48506
Greater Flint Arts Council	500.00	816 S Saginaw St., Flint, MI 48502-1730
Greenpeace	250.00	P O Box 90136, Fredericksburg, VA 22404-9952
Habitat for Humanity	500.00	5191 S Saginaw St., Flint, MI 48507
Higgins Lake Foundation	1,000.00	709 Lake St. Roscommon, MI 48653-7665
Humane Society of Genesee Co	500.00	P O Box 190138, Burton, MI 48519-0138
Mackinac Center	5,000.00	140 W Main St, P O Box 568, Midland, MI 48640
McLaren Visiting Nurses Association	50.00	401 S. Ballenger Highway, Flint, MI 48504
Michigan Audubon Society	250.00	6011 W St. Joseph, Ste. 403, Lansing, MI 48908-0527
Michigan Nature Association	1,000.00	326 E Grand River Ave, Williamson, MI 48895
NCALG (Gambling)	250.00	831 S King St , Ste. E, Leesburg, VA 20175
National Audubon Society	250.00	P O Box 422247, Palm Coast, FL 32142-6716
National Right to Work Legal Defense Fr	2,000.00	8001 Braddock Rd, Suite 600, Springfield, VA 22160
The Nature Conservancy	1,000.00	101 East Grand River, Lansing, MI 48906-4348
Negative Population Growth	250.00	2861 Duke St, Suite 36, Alexandria, VA 22314
Old Newsboys of Flint	500.00	3216 Lapeer, Flint, MI 48503
Parents Television Council	250 00	P O Box 1855, Merrifield, VA 22116-9624
PCI-Media Impact	250.00	777 United Nations Plaza, New York, NY 10164-0154
Planned Parenthood of E Central MI	1,000.00	3371 Beecher RD, Flint, MI 48532-4903
Planned Parenthood Fed of America	1,000.00	P O Box 97166, Washington, DC 20077
Population Connection	250.00	P O Box 97129. Washington, DC 20077-7052
ProEnglish	100.00	P. O Box 97005, Washington, DC 20090-7005
Resource Genesee	1,000.00	1401 S Grand Traverse, Flint, MI 48503
Rotary Charitable Foundation	10,000.00	2481 Delwood Dr, Clio, MI 48240
St. Jude Children's Research Hospital	500.00	P. O Box 80, Memphis, TN 38101
Salem Housing Task Force	500.00	3216 M L King Ave, Flint, MI 48505
Sierra Club	500.00	109 E. Grand River Avenue, Lansing, MI 48906
Smile Train	500.00	41 Madison Ave, 28th Floor, New York, NY 10010

Special Olympics Area XIII	350.00	2413 W. Maple Ave., Flint, MI 48507
United Way	22,500.00	202 E Boulevard Dr, Flint, MI 48503
U S Olympic Committee	250.00	P O Box 7010 Albert Lea, MN 56007-8010
U S O World Headquarters	500.00	P. O. Box 96860, Washington, DC 20077-7677
Whaley Children's Center	1,500.00	1201 N Grand Traverse, Flint, MI 48503
Whaley Historical House	250.00	624 E Kearsley, Flint, MI 48503
The Wilderness Society	250.00	P O Box 97231, Washington DC 20077-7749
Weiss Children's Advocacy Center	500.00	515 East St., Flint, MI 48503
World Wildlife Fund	250.00	P O Box 96555, Washington DC 20077-7789
YMCA of Flint	1,000.00	411 E Third St, Flint, MI 48503
YWCA of Flint	15,000.00	310 E Third St, Flint, MI 48503

	124,961.00	

EDUCATIONAL		
Berea College	500.00	101 Chestnut St., Berea, KY 40403
Culver Educational Foundation	400,000.00	Culver, IN 46511
Dyslexia Institute of Michigan	350,000 00	532 E Shiawasse, Lansing, MI 48912
Flint Area Science Fair	1,000.00	P O Box 687 Flint, MI 48501
Hillsdale College	500.00	33 E College, Hillsdale, MI 49242
St Paul Lutheran School	250.00	402 S Ballenger, Flint, MI 48532
Starr Commonwealth	1,000.00	13725 26 Mile Rd, Albion, MI 49224
Wellesley College	250.00	106 Central St., Wellesley, MA 02481-8203
WFUM 28 Public Television		1321 E Court St, Flint, MI 48503

	753,500.00	

RELIGIOUS		
Billy Graham Evan. Ass'n	100.00	1 Billy Graham PKY, Charlotte, NC 28201
Carriage Town Ministries	750 00	605 Garland St, Flint, MI 48503
Christ Enrichment Center	1,500 00	322 E. Hamilton Ave, Flint, MI 48505
Full Life Crusade	500.00	P O Box 398, Winona Lake, IN 46590
St Paul Lutheran Church	1,000.00	402 S Ballenger, Flint, MI 48532
Salvation Army	1,000.00	211 W Kearsley St, Flint, MI 48502

	4,850.00	

	883,311.00	
APF\GIFTS-YR	=========	

Anna Paulina Foundation

Form 990-PF, Part VIII - 2009

Information About Officers, Directors, Trustees, Etc.

The Anna Paulina Foundation has no employees.

All the trustees are listed below. They devote minimal time to their positions and receive no compensation. They receive no benefits and no expense or other allowances.

President	John C. Koegel 3400 West Bristol Road, Flint, MI 48507-3112
Vice-President	Elizabeth M. Neithercut 3400 West Bristol Road, Flint, MI 48507-3112
Secretary	Jeffry D. Rocco 3400 West Bristol Road, Flint, MI 48507-3112
Treasurer	Albert J. Koegel 3400 West Bristol Road, Flint, MI 48507-3112
Trustee	Edward J. Neithercut 3400 West Bristol Road, Flint, MI 48507-3112
Trustee	Mark Neithercut 3400 West Bristol Road, Flint, MI 48507-3112
Trustee	Barbara L. Koegel 3400 West Bristol Road, Flint, MI 48507-3112
Trustee	Anne Rocco 3400 West Bristol Road, Flint, MI 48507-3112
Trustee	Jane Koegel 3400 West Bristol Road, Flint, MI 48507-3112
Trustee	Kathryn Koegel 3400 West Bristol Road, Flint, MI 48507-3112
Trustee	Lisa A. Koegel 3400 West Bristol Road, Flint, MI 48507-3112

123\APF\TRUSTEES

ANNA PAULINA FOUNDATION

ASSETS AS OF 12-31-09

COST	HELD BY OWNER	MERRILL LYNCH #2091	MERRILL LYNCH #4133	UBS FINANCIAL SERVICES	SMITH BARNEY	TOTALS
MASTER CHECKING ACCOUNT	1,140,316 09					1,140,316 09
CASH IN BROKERAGE ACCOUNTS		115,324 03	23,329 24	4,834 50		143,487 77
RECEIVEABLES - GENERAL	105,595 71					105,595 71
EQUITIES	753,543 52	843,328 36	625,101 47	332,288 37		2,554,261 72
FIXED INCOME	37 77	0 00	5,357,515 84	3,840,617 72	602,892 00	9,801,063 33
	1,999,493 09	958,652 39	6,005,946 55	4,177,740 59	602,892 00	13,744,724 62
						13,744,724 62
MARKET						
CASH	1,140,316 09	115,324 03	23,329 24	4,834 50		1,283,803 86
RECEIVEABLES - GENERAL	105,595 71					105,595 71
EQUITIES	698,893 01	1,076,434 06	268,503 50	279,614 16		2,323,444 73
FIXED INCOME	37 77	0 00	5,122,296 61	3,174,623 08	610,902 00	8,907,859 46
	1,944,842 58	1,191,758 09	5,414,129 35	3,459,071 74	610,902 00	12,620,703 76
						12,620,703 76

APF\ASSETSYR

ANNA PAULINA FOUNDATION - 2009

Form 990-PF Part I Line 1 Contributions Received

Anne Rocco, 3400 W. Bristol Rd., Flint, MI 48507-3112	
Cash	217,847.66
Kathryn Koegel, 3400 W. Bristol Rd., Flint, MI 48507-3112	
Cash	250,797.66
Jane Koegel, 3400 W. Bristol Rd., Flint, MI 48507-3112	
Cash	267,847.66
John Koegel, 3400 W Bristol Rd., Flint, MI 48507-3112	
Cash	492,987.80

	1,229,480 78
	===========

APF\RECEIVED

Form **8868** (Rev. April 2009) Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ File a separate application for each return.

OMB No 1545-1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box . . . . ▶ ☐
- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Part I **Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension—check this box and complete Part I only . . . . ▶ ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Electronic Filing (*e-file*). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit *www.irs.gov/efile* and click on *e-file for Charities & Nonprofits.*

Type or print	Name of Exempt Organization ANNA PAULINA FOUNDATION	**Employer identification number** 38 6061335
File by the due date for filing your return See instructions	Number, street, and room or suite no If a P O box, see instructions. 3400 W. BRISTOL RD	
	City, town or post office, state, and ZIP code For a foreign address, see instructions FLINT, MI 48507-3112	

Check type of return to be filed (file a separate application for each return):

☐ Form 990	☐ Form 990-T (corporation)	☐ Form 4720
☐ Form 990-BL	☐ Form 990-T (sec. 401(a) or 408(a) trust)	☐ Form 5227
☐ Form 990-EZ	☐ Form 990-T (trust other than above)	☐ Form 6069
☑ Form 990-PF	☐ Form 1041-A	☐ Form 8870

- The books are in the care of ▶ A.J. KOEGEL, TREASURER

Telephone No. ▶ (810) 238-3685 FAX No. ▶ (810) 238-2467

- If the organization does not have an office or place of business in the United States, check this box . . . . ▶ ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN)________. If this is for the whole group, check this box . . . . . . ▶ ☐ . If it is for part of the group, check this box . . . . . . ▶ ☐ and attach a list with the names and EINs of all members the extension will cover.

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2010, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

▶ ☑ calendar year 2009 or

▶ ☐ tax year beginning ________, 20__, and ending ________, 20__.

2 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	$ 12,800.
b	If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	$ 12,800.
c	**Balance Due.** Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	$ 0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

● If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** and check this box ▶ ☐

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

● If you are filing for an **Automatic 3-Month Extension, complete only Part I** (on page 1).

Part II **Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Type or print File by the extended due date for filing the return See instructions	Name of Exempt Organization	**Employer identification number**
	Number, street, and room or suite no. If a P O box, see instructions	For IRS use only
	City, town or post office, state, and ZIP code For a foreign address. see instructions	

Check type of return to be filed (File a separate application for each return):

☐ Form 990 ☐ Form 990-PF ☐ Form 1041-A ☐ Form 6069
☐ Form 990-BL ☐ Form 990-T (sec. 401(a) or 408(a) trust) ☐ Form 4720 ☐ Form 8870
☐ Form 990-EZ ☐ Form 990-T (trust other than above) ☐ Form 5227

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

● The books are in the care of ▶

Telephone No. ▶ ( ) FAX No. ▶ ( )

● If the organization does not have an office or place of business in the United States, check this box . . . . . . ▶ ☐

● If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ . If this is for the whole group, check this box . . . . . . ▶ ☐ . If it is for part of the group, check this box. . . . . . ▶ ☐ and attach a list with the names and EINs of all members the extension is for.

4 I request an additional 3-month extension of time until ______, 20___.

5 For calendar year ____, or other tax year beginning ______, 20___, and ending ______, 20___.

6 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

7 State in detail why you need the extension

8a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	**8a**	$
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	**8b**	$
c	**Balance Due.** Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	**8c**	$

Signature and Verification

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form

Signature ▶ John C. Koegel Title ▶ PRESIDENT Date ▶ 5-12-10