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Form **990-PF**

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

OMB No 1545-0052

2009Department of the Treasury
Internal Revenue Service

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

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

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation CHARLES M. BAUERVIC FOUNDATION, INC		A Employer identification number 38-6146352
	Number and street (or P O box number if mail is not delivered to street address) 2155 BUTTERFIELD DR., STE. 305A	Room/suite	B Telephone number (see page 10 of the instructions) 248-643-4545
	City or town, state, and ZIP code TROY MI 48084		C If exemption application is pending, check here <input type="checkbox"/>
			D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 3,320,565		J Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The

total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (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)				
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	72,200	70,578		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	69,806			
b Gross sales price for all assets on line 6a 122,363				
7 Capital gain net income (from Part IV, line 2)		69,806		
8 Net short-term capital gain			0	
9 Income modifications				
10a Gross sales less returns & 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	142,006	140,384	0	
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc	106,636	54,818		51,818
14 Other employee salaries and wages				
15 Pension plans, employee benefits	32,068	16,034		16,034
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule) STMT 1	5,087	2,544		2,543
c Other professional fees (attach schedule)				
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions) STMT 2	-6,200	-3,100		-3,100
19 Depreciation (attach schedule) and depletion STMT 3	1,627			
20 Occupancy				
21 Travel, conferences, and meetings	6,265	3,132		3,133
22 Printing and publications				
23 Other expenses (att sch) STMT 4	7,294	4,437		2,857
24 Total operating and administrative expenses. Add lines 13 through 23	152,777	77,865		73,285
25 Contributions, gifts, grants paid	110,000			110,000
26 Total expenses and disbursements. Add lines 24 and 25	262,777	77,865	0	183,285
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	-120,771			
b Net investment income (if negative, enter -0-)		62,519		
c Adjusted net income (if negative, enter -0-)			0	

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

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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	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		74,195	9,435	9,435
	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 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) SEE STMT 5	1,480,956	1,265,903	1,508,510	
	c	Investments—corporate bonds (attach schedule)				
	11	Investments—land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach sch) ▶				
	12	Investments—mortgage loans				
	13	Investments—other (attach schedule) SEE STATEMENT 6	1,421,854	1,610,173	1,800,572	
	14	Land, buildings, and equipment basis ▶ 14,905 Less: accumulated depreciation (attach sch) ▶ STMT 7 12,857	2,780	2,048	2,048	
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	2,979,785	2,887,559	3,320,565		
Liabilities	17	Accounts payable and accrued expenses	-59	1,737		
	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)	-59	1,737		
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	1,993,627	1,993,627		
	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds	986,217	892,195		
30	Total net assets or fund balances (see page 17 of the instructions)	2,979,844	2,885,822			
31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	2,979,785	2,887,559			

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	2,979,844
2	Enter amount from Part I, line 27a	2	-120,771
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8	3	26,749
4	Add lines 1, 2, and 3	4	2,885,822
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	2,885,822

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 SEE WORKSHEET				
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) 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))
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	2	69,806
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	80

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	187,574	3,848,216	0.048743
2007	228,123	4,888,753	0.046663
2006	215,487	4,588,093	0.046967
2005	218,101	4,121,119	0.052923
2004	202,158	3,849,132	0.052520

2 Total of line 1, column (d)	2	0.247816
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	0.049563
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	3,014,112
5 Multiply line 4 by line 3	5	149,388
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	625
7 Add lines 5 and 6	7	150,013
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 on page 18	8	183,285

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 <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	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	625
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	625
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	625
6	Credits/Payments.		
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	4,010
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	4,010
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	3,385
11	Enter the amount of line 10 to be Credited to 2010 estimated tax 3,385 Refunded	11	

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 page 19 of 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?		X
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 page 19 of the instructions) MI		
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 on page 27)? 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 page 20 of 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 ► N/A	13	X	
14	The books are in care of ► EDWARDS, ELLIS, STANLEY & CO, PC 2155 BUTTERFIELD DR, STE 305A Located at ► TROY, MI	Telephone no. ► 248-643-4545 ZIP+4 ► 48084		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the year	► 15 <input type="checkbox"/>		

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 checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	1b <input type="checkbox"/> X	
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? If "Yes," list the years ► 20 , 20 , 20 , 20	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
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?	<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 N/A	
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))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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		N/A <input type="checkbox"/>	5b	
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? If "Yes," attach the statement required by Regulations section 53.4945-5(d).		N/A <input type="checkbox"/> Yes <input type="checkbox"/> No		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	X
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		N/A	7b	

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (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 STATEMENT 9				

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 N/A	
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 N/A	
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	1,350,483
b	Average of monthly cash balances	1b	189,303
c	Fair market value of all other assets (see page 24 of the instructions)	1c	1,520,226
d	Total (add lines 1a, b, and c)	1d	3,060,012
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	3,060,012
4	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	45,900
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,014,112
6	Minimum investment return. Enter 5% of line 5	6	150,706

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	150,706
2a	Tax on investment income for 2009 from Part VI, line 5	2a	625
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	625
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	150,081
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	150,081
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	150,081

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	183,285
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	183,285
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	625
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	182,660

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				150,081
2 Undistributed income, if any, as of the end of 2009.				
a Enter amount for 2008 only			138,736	
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2009.				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e				
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 183,285				
a Applied to 2008, but not more than line 2a			138,736	
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)				
d Applied to 2009 distributable amount				44,549
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e. Subtract line 5				
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				105,532
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)				
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

Part XV Supplementary Information (continued)**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				110,000
Total			3a	110,000
b Approved for future payment N/A				
Total			3b	

Part XVI-A Analysis of Income-Producing Activities[illegible]

12 Subtotal. Add columns (b), (d), and (e)

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

(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

Form 990-PF	Capital Gains and Losses for Tax on Investment Income	2009
For calendar year 2009, or tax year beginning _____, and ending _____		

Name CHARLES M. BAUERVIC FOUNDATION, INC	Employer Identification Number 38-6146352
--	---

(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)
(1) KINDER MORGAN ENERGY	P	02/16/07	VARIOUS
(2) COMPASS MINERALS INTL INC	P	01/22/09	08/18/09
(3) GENERAL ELECTRIC CO	P	VARIOUS	09/01/09
(4) SMUCKER J M CO	P	12/18/85	VARIOUS
(5) SCUDDER US GOVT A FD	P	VARIOUS	07/17/09
(6) FRANK TEMP MUTUAL CAPGAINDIV			
(7)			
(8)			
(9)			
(10)			
(11)			
(12)			
(13)			
(14)			
(15)			

(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)
(1) 823		823	
(2) 5,230		5,150	80
(3) 14,721		20,114	-5,393
(4) 100,250		25,795	74,455
(5) 675		675	
(6) 664			664
(7)			
(8)			
(9)			
(10)			
(11)			
(12)			
(13)			
(14)			
(15)			

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	
(1)			
(2)			80
(3)			-5,393
(4)			74,455
(5)			
(6)			664
(7)			
(8)			
(9)			
(10)			
(11)			
(12)			
(13)			
(14)			
(15)			

Form **4562**Department of the Treasury
Internal Revenue Service

(99)

Depreciation and Amortization
(Including Information on Listed Property)

OMB No 1545-0172

2009Attachment
Sequence No **67**

▶ See separate instructions.

▶ Attach to your tax return.

Name(s) shown on return

CHARLES M. BAUERVIC FOUNDATION, INC

Identifying number

38-6146352

Business or activity to which this form relates

INDIRECT DEPRECIATION**Part I Election To Expense Certain Property Under Section 179****Note:** If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount See the instructions for a higher limit for certain businesses	1	250,000
2	Total cost of section 179 property placed in service (see instructions)	2	
3	Threshold cost of section 179 property before reduction in limitation (see instructions)	3	800,000
4	Reduction in limitation Subtract line 3 from line 2 If zero or less, enter -0-	4	
5	Dollar limitation for tax year Subtract line 4 from line 1 If zero or less, enter -0- If married filing separately, see instructions	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property. Enter the amount from line 29	7	
8	Total elected cost of section 179 property Add amounts in column (c), lines 6 and 7	8	
9	Tentative deduction Enter the smaller of line 5 or line 8	9	
10	Carryover of disallowed deduction from line 13 of your 2008 Form 4562	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5 (see instructions)	11	
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11	12	
13	Carryover of disallowed deduction to 2010 Add lines 9 and 10, less line 12 ▶	13	

Note: Do not use Part II or Part III below for listed property. Instead, use Part V**Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.) (See instr.)**

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see instructions)	14	448
15	Property subject to section 168(f)(1) election	15	
16	Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Do not include listed property.) (See instructions.)**Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2009	17	1,109
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here ▶		

Section B—Assets Placed in Service During 2009 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only—see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property		447	5.0	MQ	200DB	70
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs		S/L	
h Residential rental property			27.5 yrs	MM	S/L	
			27.5 yrs	MM	S/L	
i Nonresidential real property			39 yrs.	MM	S/L	
				MM	S/L	

Section C—Assets Placed in Service During 2009 Tax Year Using the Alternative Depreciation System

20a Class life					S/L	
b 12-year			12 yrs.		S/L	
c 40-year			40 yrs.	MM	S/L	

Part IV Summary (See instructions.)

21	Listed property Enter amount from line 28	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21 Enter here and on the appropriate lines of your return Partnerships and S corporations—see instructions	22	1,627
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

For Paperwork Reduction Act Notice, see separate instructions.

Form **4562** (2009)

DAA

THERE ARE NO AMOUNTS FOR PAGE 2

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
G/L POSTING & TAX PREPARATION	\$ 5,087	\$ 2,544	\$	\$ 2,543
TOTAL	\$ 5,087	\$ 2,544	\$ 0	\$ 2,543

Statement 2 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXCISE TAX	\$ -6,719	\$ -3,360	\$	\$ -3,359
FOREIGN TAX	519	260		259
TOTAL	\$ -6,200	\$ -3,100	\$ 0	\$ -3,100

Statement 3 - Form 990-PF, Part I, Line 19 - Depreciation

Date Acquired	Description	Cost Basis	Prior Year Depreciation	Method	Life	Current Year Depreciation	Net Investment Income	Adjusted Net Income
4/12/03	FAX/PRINTER/SCANNER	\$ 470	\$ 470	200DB	5	\$	\$	\$
7/01/03	COPIER	288	288	200DB	5			
2/05/04	COMPUTER	620	602	200DB	5	18		
2/05/04	FILE CABINET	125	111	200DB	7	6		
7/21/04	BOSE CORP OFFICE EQUIPMENT	499	443	200DB	7	23		
12/14/05	FILE RACK	337	219	200DB	7	34		
11/01/07	COMPUTER MACINTOSH	2,974	1,279	200DB	5	678		
4/01/08	MAC COMPUTER TREASURER	1,540	924	200DB	5	246		
6/23/08	HP COPIER/PRINTER/FAX	656	394	200DB	5	105		

Federal Statements

Statement 3 - Form 990-PF, Part I, Line 19 - Depreciation (continued)

Description							
Date Acquired	Cost Basis	Prior Year Depreciation	Method	Life	Current Year Depreciation	Net Investment Income	Adjusted Net Income
MISC. FURNITURE							
1/01/83 \$	572 \$	572	S/L	8	\$	\$	\$
FILE CABINET							
10/01/84	348	348	S/L	5			
FILE CABINET							
1/02/85	280	280	S/L	5			
DOMICILE-OFFICE FURN.							
9/01/85	270	270	S/L	5			
BOOKSHELVES							
9/01/85	145	145	S/L	5			
FILE CABINETS & MISC.							
1/31/87	523	523	S/L	7			
FILE CABINETS							
2/07/87	174	174	S/L	7			
BOOKCASES							
2/25/87	211	211	S/L	7			
SHELVES							
3/31/91	239	239	200DB	7			
OFFICE SHELVING							
11/16/92	187	187	200DB	7			
OFFICE DESK & CHAIR							
12/20/95	326	326	200DB	7			
DEHUMIDIFIER							
8/30/97	313	313	200DB	5			
FILE CABINET & SHELVES							
2/06/99	772	772	200DB	7			
LAPTOP COMPUTER							
11/03/00	2,140	2,140	200DB	5			
PRINTER							
4/10/09	474		200DB	5	296		
COMPUTER							
10/25/09	421		200DB	5	221		
TOTAL	\$ 14,904	\$ 11,230		\$	1,627	\$ 0	\$ 0

Federal Statements

Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES				
SECRETARIAL SERVICES	170	85		85
OFFICE EXPENSE	3,508	1,754		1,754
TELEPHONE	1,834	917		917
DUES & SUBSCRIPTIONS	1,726	1,653		73
MISCELLANEOUS	56	28		28
TOTAL	<u>7,294</u>	<u>4,437</u>	<u>0</u>	<u>2,857</u>
	\$	\$	\$	\$

Statement 5 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
ALBERTA STAR DEV CORP	\$ 5,034	\$ 5,034	COST	\$ 443
ALCOA INC		7,125	COST	8,060
AMEREN CORP COM	47,689	47,689	COST	97,825
ANGLO PLATINUM	998	998	COST	4,090
ANGLO AMERN PLC ADR	19,839	19,839	COST	56,649
ANGLOGOLD ASHANTI LTD	47,138	47,138	COST	75,940
APPLE INC		9,976	COST	25,920
ASA LIMITED	68,565	68,565	COST	116,175
AREVA CI SOCIETE PARTIC DU COM	100,000	100,000	COST	50,073
BARRICK GOLD CORP	39,424	39,424	COST	73,562
BAYSWATER URANIUM CORP	6	6	COST	
CAMECO CORP	16,354	16,354	COST	32,170
DENISON MINES INC COM	31,144	31,144	COST	7,018
DUKE ENERGY CORP	19,342	19,342	COST	68,840
ENERGY RES OF AUST SHS	10,013	10,013	COST	22,775
EXELON CORP	50,006	50,006	COST	31,619
FREEPORT MCMORAN COPPER&GOLD		10,150	COST	20,072
FRONTEER DEV GP INC (CANADA)	49,887	59,038	COST	32,560
GENERAL ELECTRIC	10,022		COST	
GOLDCORP INC	5,594	5,594	COST	7,199
INDUSTRIAS PENOLES ORD	7,002	7,002	COST	75,928
JNR RES INC COM	25,691	25,691	COST	2,335
KINDER MORGAN ENERGY PARTNER	8,759	7,936	COST	11,952
KINROSS GOLD CORP COM NEW	19,977	19,977	COST	57,132
LARAMIDE RESOURCES LTD	50,668	50,668	COST	18,587
MEGA URANIUM LTD COM ISIN	108,444	108,444	COST	15,302
NEWMONT MINING	8,872	8,872	COST	33,117

Statement 5 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments (continued)

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
NORTH AMERICAN PALLADIUM LTD	\$ 21,222	\$ 21,222	COST	\$ 8,379
PAN AMERICAN SILVER CORP	25,044	25,044	COST	19,048
PINETREE CAP LTD COM	95,591	97,218	COST	32,077
PROGRESS ENERGY	49,586	49,586	COST	43,060
SHAW GROUP INC	5,006	5,006	COST	4,255
SILVER STANDARD RES	45,077	45,077	COST	32,914
SMUCKER	75,585	42,125	COST	195,130
SOUTHERN CO	100,319	100,319	COST	93,296
SUMMIT RESOURCES LTD	26,848	26,848	COST	23,148
TELEFONICA S A ADR	643	643	COST	6,013
TREASURY METALS	4,515	4,515	COST	1,384
UEX CORP COM	17,946	17,946	COST	5,580
YAMANA GOLD	10,377	10,377	COST	54,931
JP MORGAN LIQUID ASSETS MMKT	252,729	43,952	COST	43,952
TOTAL	\$ 1,480,956	\$ 1,265,903		\$ 1,508,510

Statement 6 - Form 990-PF, Part II, Line 13 - Other Investments

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Basis of Valuation</u>	<u>Fair Market Value</u>
FRANKLIN TEMP MUTUAL SHARES FD	\$ 432,114	\$ 442,330	COST	\$ 467,977
FRANKLIN TEMP MUTUAL QUEST FD	631,783	646,006	COST	712,955
AMER CENTURY CAPITAL PRESERV	5,581	5,583	COST	5,583
AMER CENTURY GLOBAL GOLD	91,190	92,362	COST	190,360
SCUDDER US GOVT A FUND	261,186	273,446	COST	264,922
INVESTMENT GOLD COINS		150,446	COST	158,775
TOTAL	\$ <u>1,421,854</u>	\$ <u>1,610,173</u>		\$ <u>1,800,572</u>

Federal Statements

Statement 7 - Form 990-PF, Part II, Line 14 - Land, Building, and Equipment

Description	Beginning Net Book	End Cost / Basis	End Accumulated Depreciation	Net FMV
Equipment	\$ 2,780	\$ 14,905	\$ 12,857	\$ 2,048
TOTAL	\$ 2,780	\$ 14,905	\$ 12,857	\$ 2,048

Statement 8 - Form 990-PF, Part III, Line 3 - Other Increases

<u>Description</u>	<u>Amount</u>
STOCK DONATION FMV HIGHER THAN COST	\$ 26,749
TOTAL	\$ 26,749

Date: December 10, 2009

To: Pat Leonard - President

From: Ted Leonard - Treasurer

RE: CMB Foundation Grant Award Transfers

Please find below the corresponding stock transfer amounts that were processed today through the Chase Investment Services Brokerage account:

Southwest College of Naturapathic Medicine

Grant Award: \$15,000.00
 No. of shares: 245
 Transfer Amount: \$14,663.25
 Balance: \$336.75

Hillsdale College

Grant Award: \$10,000.00
 No. of shares: 165
 Transfer Amount: \$9,875.25
 Balance: \$124.75

Madonna College

Grant Award: \$10,000.00
 No. of shares: 165
 Transfer Amount: \$9,875.25
 Balance: \$124.75

A stock transfer was processed today using stock held in J.M.Smuckers company (NYSE symbol: SJM) in the amount of \$59.25 per share at closing.

Value of donated shares \$ 34,413.75

Cost basis of donated shares 7,665.15

26,748.60

Federal Statements

Statement 9 - Form 990-PF, Part VIII, Line 1 - List of Officers, Directors, Trustees, Etc.

Name and Address	Title	Average Hours	Compensation	Benefits	Expenses
PATRICIA LEONARD 2155 BUTTERFIELD, STE 305A TROY MI 48084	PRES/SEC 'Y	40.00	98,800	24,510	0
BEVERLY D. SEWELL 2155 BUTTERFIELD, STE 305A TROY MI 48084	VICE PRES	0.00	595	0	0
THEODORE LEONARD 2155 BUTTERFIELD, STE 305A TROY MI 48084	TREASURER	2.00	3,595	0	0
TIMOTHY LEONARD 2155 BUTTERFIELD, STE 305A TROY MI 48084	DIRECTOR	0.00	595	0	0
KATHRYN R. BOLTON 2155 BUTTERFIELD, STE 305A TROY MI 48084	DIRECTOR	2.00	2,456	0	0
JOHN C. LEONARD 2155 BUTTERFIELD, STE 305A TROY MI 48084	DIRECTOR	0.00	595	0	0

Form 990-PF, Part XV, Line 2b - Application Format and Required ContentsDescription

SEE COPY OF GRANT APPLICATION ATTACHED.

Form 990-PF, Part XV, Line 2c - Submission DeadlinesDescription

BY APRIL 30TH OF THE YEAR FOR WHICH THE GRANT IS REQUESTED

Statement 10 - Form 990-PF, Part XV, Line 2d - Award Restrictions or LimitationsDescription

NONE, EXCEPT UNDER TERMS OF ITS' ARTICLES OF
INCORPORATION: THE FOUNDATION IS TO AWARD GRANTS
ESSENTIALLY FOR EDUCATIONAL PURPOSES (WITH EMPHASIS IN
MICHIGAN)

* PART 2A - GRANTS ARE GIVEN ONLY TO QUALIFIED CHARITIES
WHICH ARE 501(C)(3) ORGANIZATIONS.

THE CHARLES M. BAUERVIC FOUNDATION, INC.

2009

FINAL GRANT LIST - Alphabetical

<u>GRANT RECIPIENT</u>	<u>PURPOSE</u>	<u>FUNDING</u>
American Opinion Foundation	"Freedom Project" - technology improvements	1,000.00
Camp Quality	Arts and Crafts Program: Supplies	1,000.00
Caring Outreach, The	Internet Youth Outreach Program	1,000.00
Cumberland College	Mountain Outreach Program	4,000.00
Detroit Symphony Orchestra	Youth Educational Concert Series	1,000.00
Eagle Forum Education & Legal Defense Fund	Literacy Project for Disadvantaged Children	1,000.00
Educational Center for Life	Teen conference billboard	10,000.00
Everest Academy	Pulldown Maps & Desk Globes for Girls Classroom	1,000.00
Father Fred Foundation	Additional shelving for Clothing & Food Pantry	1,000.00
Guest House	DVD: Youth program	500.00
Hillsdale College/Academy	14 computers for Academy	10,000.00
Holy Family	Building restoration assistance	500.00
Homeopathic Pharmacopoeia of US	Developing & marketing of the Pharmacopoeia	500.00
Institute in Basic Life Principles	Nashville Medical Center remodel for Iraqi Veterans	10,000.00
International ALERT Academy	Computer equipment	2,000.00
Leadership Institute	Training on public policy process	1,000.00
Livingston Christian School	Chairs for classroom	1,000.00
Mackinac Center for Public Policy	Student Literary Project; literary award	2,000.00
Madonna University	2 CPR Mannequins	10,000.00
National Center for Homeopathy	Educational updates to the NCH website	5,000.00
Northwood University	Charles M. Bauervic Writing Awards	6,000.00
Notre Dame Preparatory School	Fire doors; science lab equipment	5,000.00
Right to Life of Michigan Educational Fund	Printed materials for The Great Disconnect Project	5,000.00
Seton Home Study School	Reprint of 6th Grade History Workbook	5,000.00
Southwest College of Naturopathic Medicine	2009 Dr. F. Eizayaga Lecture Series & Internet taping	15,000.00
Spring Arbor University	Summer Science Camp Materials	1,000.00
St. Gregory Academy	Library establishment - shelves & books	1,000.00
St. Mary School- Lake Leelanau	Business Entrepreneur Award & Contest Promotion	1,500.00
Thomas More Law Center	Educational publication for Litigation Campaign	1,000.00
Walsh College	Charles M. Bauervic Writing Awards	5,000.00
Wyoming Catholic College	Digital visual presenter	1,000.00

2009 TOTAL GRANTS

\$ 110,000.00

THE CHARLES M. BAUERVIC FOUNDATION

10260 E. Hilltop
Suttons Bay, Michigan 49682

GRANT APPLICATION

Institution

Date

Mailing Address

Principle Co-ordinator

Title

Phone

Amount Requested

Project Title

Purpose of Proposed Grant

Check should be made payable to

Please list other foundations which have made contributions to this institution in the past. If none, please indicate.

PLEASE READ CAREFULLY AND SUBMIT THE FOLLOWING:

- 1) TITLE AND DESCRIPTION OF PROJECT (500 words or less)
- 2) AN ITEMIZED BUDGET (include other funds which will be used on the project, if any)
- 3) PLEASE INDICATE 501 c. 3 STATUS YES _____ NO _____ (PLEASE FURNISH EVIDENCE OF PRESENT TAX-EXEMPT STATUS)
- 4) ANY REPRINTS OR OTHER MATERIAL YOU FEEL WILL SUPPLEMENT THE PROJECT PROPOSAL (letters, photos, news releases, etc.)
- 5) TWO COPIES OF THIS PAST YEAR'S YEAR-END FINANCIAL REPORT
- 6) A COMPLETE REPORT OF ALL PAST FUNDS RECEIVED BY THIS FOUNDATION PRIOR TO THIS REQUEST (include amounts and dates of grants)
- 7) PLEASE RETAIN A COPY OF THIS APPLICATION FOR YOUR FILES.

THE FUNDS WHICH WILL BE GRANTED TO THIS INSTITUTION BY THE CHARLES M. BAUERVIC FOUNDATION WILL BE USED FOR THE PURPOSES SPECIFIED AND STATED IN THIS PROPOSAL WITHIN THE APPROVED TIME OR BE RETURNED TO THE CHARLES M. BAUERVIC FOUNDATION.

SHOULD THE EQUIPMENT OR MATERIALS PURCHASED WITH THESE FUNDS NO LONGER BE OF USE TO THIS ORGANIZATION OR SHOULD THIS ORGANIZATION DISSOLVE FOR ANY REASON WHATSOEVER, SUCH EQUIPMENT, MATERIALS, OR REMAINING FUNDS WILL BE PROMPTLY RETURNED TO THE CHARLES M. BAUERVIC FOUNDATION UNLESS WRITTEN PERMISSION IS OBTAINED FROM THE EXECUTIVE DIRECTOR.

Signature

Title

Date received:

Date acknowledged:

Grant number:

Rating and comments: