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`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	calen	idar year 2009, or tax yea	ır beginning			, and e	ending		
G	Check	all that apply:	Initial return		Initial return of a		charity	Final return	n
			Amended re	turn	Address cha	ange		Name change	
Us	e the	IRS Name of foundation				· · · · · · · · · · · · · · · · · · ·			n number
	label.								_
Ot	herwi			ruste			1	38-6781068	3
	print	` <u>'</u>		if mail is not de	elivered to street address)		Room/suite	B Telephone number	
	or type e Spe	.:: DO21					<u> </u>	<u>313-965-82</u>	
	e ope	one I city of town, state, a						C If exemption application is i	
		<u>DETROIT, I</u>		<u> 275-94</u>				D 1. Foreign organizations, check here	
ᅢ	_	••		· '	kempt private foundation			Foreign organizations m check here and attach c	omputation Lest,
		ction 4947(a)(1) nonexem			Other taxable private foun			E If private foundation sta	
		arket value of all assets at	end of year	J Accounti	=	Acc	ruai	under section 507(b)(1)(A), check here
		Part II, col (c), line 16)	160	01 	ther (specify)	h hoosa l		F If the foundation is in a	
	> \$			Рап I, сош	mn (d) must be on casi			under section 507(b)(1	`````
P	art I	(The total of amounts in colu	mns (b), (c), and	(d) may not	(a) Revenue and expenses per books		nvestment ome	(c) Adjusted net income	(0) Disbursements for charitable purposes
_	T.	necessarily equal the amour	• • • • • • • • • • • • • • • • • • • •	•	CAPONOGO POR GOGING	 		N/A	(cash basis only)
	1	Contributions, gifts, gran					· · · · · · · · · · · · · · · · · · ·	IV/A	
	2	Interest on savings and temporash investments	orary	augui Jeli D		 			
	3	cash investments Dividends and interest fro			43,792	 	3,792.		STATEMENT 1
	5.0	Gross rents	JIII SECULINES		45,192	1	13,134.		DIRIEMENT I
5		Net rental income or (loss)				-			
2 2 7 8	1.	Net gain or (loss) from sale of	accete not on lu	no 10	<155,212				
7 D	3	Gross sales price for all		,503.	(133/111	•			
L & 1	7	assets on line 6a Capital gain net income (from		70001			0.		
_ &	<u> </u>	Net short-term capital ga							<u> </u>
MA TA	9	Income modifications							
	10a	Gross sales less returns and allowances							
DURANA -	Ь	Less Cost of goods sold							
2	C	Gross profit or (loss)							
É	11	Other income							
<u>ک</u>	12	Total Add lines 1 through	h 11		<111,420	•> 4	13,792.		
T)	13	Compensation of officers, dire	ectors, trustees,	etc	18,774	. 1	<u>8,774.</u>		0.
	14	Other employee salaries	and wages			ļ			
u	15	Pension plans, employee		_					
Sesue	16a	Legal fees	ST	MT 2	2,434	•	2,434.		0,
٥	<u> </u>	Accounting fees							ļ
ŭ) c	Other professional fees	STI	E TN	20	•	20.		0.
Onerating and Administrative Exp	17	Interest	a=-	.cm 4	055		755		_
4	18	Taxes		MT 4	255	•	255.		0.
<u>.</u>	19	Depreciation and depletic	on						
5	20	Occupancy							
7	21	Travel, conferences, and		7	**				
2	22	Printing and publications		ပ		 			1
į	23	Other expenses	1	(n)					
2	24	Total operating and admexpenses. Add lines 13 to	TO ID	Ö S	21,483		21,483.		0
ç	25	Contributions, gifts, gran	ts.naid	뜨	90,000		, .		90,000
	26	Total expenses and dist		1	30,000	+			30,000
	-"	Add lines 24 and 25	a.;		111,483		21,483.		90,000
_	27		2 12:			<u> </u>			
		Excess of revenue over exper		sements	<222,903	.>			
		Net investment income					22,309.		
	С	Adjusted net income (if n	egative, enter -0)-)				N/A	
923 02-	501 02-10	LHA For Privacy Act a	and Paperwor	k Reduction	Act Notice, see the instr	uctions.	_ .		Form 990-PF (2009)

-Fo	rm 99	6781068 Page 2			
Г	art	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	year	
_	art	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments	60,014.	141,960.	<u>141,960.</u>
	3	Accounts receivable -			
	ļ	Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ►			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons			
	7	Other notes and loans receivable			
		Less; allowance for doubtful accounts			
ets	1	Inventories for sale or use			
Assets		· · ·			
_	i	Investments - U.S. and state government obligations	F72 202	470 400	FAC 017
	1	Investments - corporate stock STMT 5	572,383.		
	1	Investments - corporate bonds STMT 6	191,468.	90,812.	94,983.
	11	Investments - land, buildings, and equipment basis			
		Less accumulated depreciation			
	I	Investments - mortgage loans	881,048.	779,126.	735,700.
	13	Investments - other STMT 7	001,040.	1/9,120.	733,700.
	14	Land, buildings, and equipment: basis			
	4.5	Less accumulated depreciation Other accests (describe			
	13	Other assets (describe)			
	16	Total assets (to be completed by all filers)	1,704,913.	1,482,396.	1,519,460.
_		Accounts payable and accrued expenses	1,704,713.	1,402,3300	1,317,400.
	18	Grants payable			
ß	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
ige	21	Mortgages and other notes payable			
Ë	1	Other liabilities (describe >			
		,			
	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here			
		and complete lines 24 through 26 and lines 30 and 31.			
ces	24	Unrestricted			
Jan	25	Temporarily restricted			
Net Assets or Fund Balances	26	Permanently restricted			
ဋ		Foundations that do not follow SFAS 117, check here			
Ē		and complete lines 27 through 31.			
tso	27	Capital stock, trust principal, or current funds	0.	0.	
sse	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
ţ	29	Retained earnings, accumulated income, endowment, or other funds	1,704,913.	1,482,396.	
ž	30	Total net assets or fund balances	1,704,913.	1,482,396.	
				4 400 000	
_	31	Total liabilities and net assets/fund balances	1,704,913.	1,482,396.	
E	art	III Analysis of Changes in Net Assets or Fund B	alances		
1	Tota	I net assets or fund balances at beginning of year - Part II, column (a), line	30		
•		st agree with end-of-year figure reported on prior year's return)	1	1,704,913.	
2		r amount from Part I, line 27a		2	<222,903.>
3		er increases not included in line 2 (itemize) ADJUSTING E	NTRY	3	386.
-		lines 1, 2, and 3		4	1,482,396.
		reases not included in line 2 (itemize)		5	0.
		net assets or fund halances at end of year (line 4 minus line 5) - Part II, co	lumn (h) line 30	6	1.482.396.

Form **990-PF** (2009)

TRUSTEE

COMERICA BANK

Part IV Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase D - Donation (a) List and describe the kind(s) of property sold (e.g., real estate. (c) Date acquired (d) Date sold (mo., day, yr) (mo., day, yr.) 2-story brick warehouse; or common stock, 200 shs. MLC Co.) 1a SEE ATTACHED STATEMENTS b C d е (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss) (e) Gross sales price plus expense of sale (e) plus (f) minus (g) (or allowable) b đ <155,212.> 916,715 761,503. Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Gains (Col. (h) gain minus col. (k), but not less than -0-) or (j) Adjusted basis (k) Excess of col. (i) Losses (from col. (h)) (i) F.M.V. as of 12/31/69 as of 12/31/69 over col. (j), if any þ C d <155,212.> If gain, also enter in Part I, line 7 <155,212.> 2 2 Capital gain net income or (net capital loss) If (loss), enter -0- in Part I, line 7 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 N/A 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. Yes X No Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part. Enter the appropriate amount in each column for each year; see instructions before making any entries. (d)
Distribution ratio
(col. (b) divided by col. (c)) (a)
Base period years
Calendar year (or tax year beginning in) (b) Adjusted qualifying distributions Net value of noncharitable-use assets 97,791 1,795,652. .054460 2008 2,043,691. .045577 93,145 2007 94,659 1,955,487. .048407 2006 .047905 91,586 1,911,823. 2005 75,811 1,862,990. .040693 2004 2 .237042 2 Total of line 1, column (d) Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years .047408 3 the foundation has been in existence if less than 5 years 1,425,095. Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 4 67,561. 5 Multiply line 4 by line 3 223. Enter 1% of net investment income (1% of Part I, line 27b) 6 Add lines 5 and 6 7 67,784. 90,000. 8 Enter qualifying distributions from Part XII, line 4 8 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.

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Pa	rt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948	- see	instru	ctior	าร)
`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 X and enter 1%			2	<u>23.</u>
	of Part I, line 27b				
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-)		_		0.
3	Add lines 1 and 2			2	<u>23.</u>
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)				0.
5	Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-			2	<u>23.</u>
6	Credits/Payments.				
a	2009 estimated tax payments and 2008 overpayment credited to 2009 6a 2,671.				
b	Exempt foreign organizations - tax withheld at source 6b				
C	Tax paid with application for extension of time to file (Form 8868)				
d	Backup withholding erroneously withheld 6d				
7	Total credits and payments. Add lines 6a through 6d			2,6	<u>71.</u>
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8				
9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed				
10	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			2,4	48.
11	Enter the amount of line 10 to be: Credited to 2010 estimated tax 2,448. Refunded 11				0.
Pa	rt VII-A Statements Regarding Activities				
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in			Yes	No
	any political campaign?		1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?		1b		X
	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		_X_
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year				
	(1) On the foundation. ▶ \$ 0 . (2) On foundation managers. ▶ \$				
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation				
	managers. ► \$0.				
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		2_		X
	If "Yes," attach a detailed description of the activities				
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		<u>X</u>
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		_X_
b	If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	4b		<u> </u>
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		_X_
	If "Yes," attach the statement required by General Instruction T				
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	X	
7	Did the foundation have at least \$5,000 in assets at any time during the year?		7	X	<u> </u>
	If "Yes," complete Part II, col (c), and Part XV				
8a	Enter the states to which the foundation reports or with which it is registered (see 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		8b	X	<u> </u>
9	Is the foundation claiming status as a private operating foundation within the meaning of section $4942(j)(3)$ or $4942(j)(5)$ for calendar				
	year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		10		<u> </u>
		Fo	rm 990	-PF ((2009)

had not been removed from jeopardy before the first day of the tax year beginning in 2009?

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Pa	rt VII-A Statements Regarding Activities (continued)				
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of				
	section 512(b)(13)? If "Yes," attach schedule (see instructions)		_11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before				
	August 17, 2008?		12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?		13	X	
	Website address ► N/A				
14	The books are in care of ► SCOTT A. DROGS, COMERICA BANK, Telephone	no. ▶ <u>734 – 93</u>	0-2	<u>416</u>	
	Located at ▶P.O. BOX 75000, MC 9413, DETROIT, MI	ZIP+4 ▶ 48	275		
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	N	<u>/A</u>	
Pa	rt VII-B Statements Regarding Activities for Which Form 4720 May Be Required				
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly):				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)	_			
	a disqualified person?	Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X 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 X No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No"		1		
	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 X No	1		
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		X
	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?		10		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation.	ion			
	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) begin				
	before 2009?	Yes X No	1		
	If "Yes," list the years \blacktriangleright ,,,,			·	
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to inco				
	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and at		l		
	statement - see instructions.)	N/A	2b	-	<u> </u>
C	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here				
_	P. (1) (1) (1) (1) (1) (1) (1) (1) (1) (1)				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time	Yes X No			
	during the year?				
D	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified person				
	May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7))		']
	of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedu		25		1
4	Form 4720, to determine if the foundation had excess business holdings in 2009.)	N/A	3b		v
	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable pur	nace that	4a		X
IJ	DIG THE TOUTIGETON THANG ANY INVESTIGATION A DITOL YEAR (DUT AIR) DECEMBER 31, 1303) HIST COURT RODAT GIZE ILS CHANGARE DUT	טטט ווומו	1	ľ	1

GENERATION IV CHARITABLE TRUST COMERICA BANK, TRUSTEE 38-6781068 Page 6 Form 990-PF (2009) 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: Yes X No (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, Yes X No any voter registration drive? Yes X No (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section 🗌 Yes 💢 No 509(a)(1), (2), or (3), or section 4940(d)(2)? (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for Yes X No the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations N/A section 53.4945 or in a current notice regarding disaster assistance (see instructions)? 5b Organizations relying on a current notice regarding disaster assistance check here c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained ___ Yes [N/A expenditure responsibility for the grant? 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 Yes X No a personal benefit contract? b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 6b Х If "Yes" to 6b, file Form 8870 Yes X No 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? 7b N/Ab If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? Information About Officers, Directors, Trustees, Foundation Managers, Highly Part VIII Paid Employees, and Contractors 1 List all officers, directors, trustees, foundation managers and their compensation. (c) Compensation (d) Contributions to employee benefit plans and deferred compensation (b) Title, and average hours per week devoted to position (e) Expense account, other (a) Name and address (If not paid, enter -0-) allowances COMERICA BANK TRUSTEE P.O. BOX 75000 **DETROIT, MI 482759413** 0 0 0. 2.00 DUANE L. TARNACKI TRUSTEE 500 WOODWARD AVE., SUITE 3500 0. 0 0 DETROIT, MI 48226 2.00 HELEN M. FOWLER TRUSTEE 32606 PINE RIDGE DRIVE 0 0 0. WARREN, MI 48093 2.00 2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE." (d) Contributions to employee benefit plans and deferred compensation (e) Expense account, other allowances (b) Title, and average (a) Name and address of each employee paid more than \$50,000 hours per week devoted to position (c) Compensation NONE

Total number of other employees paid over \$50,000

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Form 990-PF (2009) COMERICA BANK, TRUSTEE		<u> 781068 </u>	Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Man Paid Employees, and Contractors (continued)	agers, Highly		
3 Five highest-paid independent contractors for professional services. If none, enter "NONE."			
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Comp	ensation
NONE			
1,01,2			
	-		
Total number of others receiving over \$50,000 for professional services		•	0
Part IX-A Summary of Direct Charitable Activities			<u>_</u>
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information	on such as the	Expenses	
number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.			
1 <u>N/A</u>			
			•
			0.
2			
3			
T			
		•	
Part IX-B Summary of Program-Related Investments			
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 instructions.			
3			
Total Add lines 1 through 3			11

4 5

6

.Form 990-PF (2009)

38-6781068 Page 8 COMERICA BANK, TRUSTEE Part X Minimum Investment Return (All domestic foundations must complete this part Foreign foundations, see instructions.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: 1,323,273. a Average monthly fair market value of securities 1a 123,524. Average of monthly cash balances 1b c Fair market value of all other assets 1c 1,446,797. d Total (add lines 1a, b, and c) 1d Reduction claimed for blockage or other factors reported on lines 1a and 0. 1e 1c (attach detailed explanation) Acquisition indebtedness applicable to line 1 assets 3 1.446.797. Subtract line 2 from line 1d 3 21,702. Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4 5 1,425,09<u>5</u>. 71,255. Minimum investment return. Enter 5% of line 5 Distributable Amount (see instructions) (Section 4942(1)(3) and (1)(5) private operating foundations and certain Part XI foreign organizations check here
and do not complete this part.) 71,255. Minimum investment return from Part X, line 6 223 Tax on investment income for 2009 from Part VI, line 5 Income tax for 2009. (This does not include the tax from Part VI.) 2b 223. 2c Add lines 2a and 2b 032. Distributable amount before adjustments. Subtract line 2c from line 1 3 3

Part XII Qualifying Distributions (see instructions)

Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1

Recoveries of amounts treated as qualifying distributions

Deduction from distributable amount (see instructions)

4940(e) reduction of tax in those years.

Add lines 3 and 4

6

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	90,000.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:	1	
а	Suitability test (prior IRS approval required)	3a	
þ	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	90,000.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income Enter 1% of Part I, line 27b	5	223.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	89,777.
	Note The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the fo	undation qualifies for the	section

Form **990-PF** (2009)

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38-6781068

COMERICA BANK, TRUSTEE

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI,				
line 7				71,032.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			89,271.	
b Total for prior years:				
,,		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008	_			
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from				
Part XII, line 4: ► \$90,000.				
a Applied to 2008, but not more than line 2a			89,271.	
b Applied to undistributed income of prior		_		
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus	_			
(Election required - see instructions)	0.			
d Applied to 2009 distributable amount				729.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract				
line 4b from line 2b		0.		
c Enter the amount of prior years'				
undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2008. Subtract line	· -			
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2010				70,303.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004				
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2010.	-		·	
Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2005	•			
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

		JSTEE			781068 Page 1
Part XIV Private Operating Fo	oundations (see in	structions and Part V	II-A, question 9)	N/A	
1 a If the foundation has received a ruling of	r determination letter tha	it it is a private operating			
foundation, and the ruling is effective for	r 2009, enter the date of	the ruling	▶		
b Check box to indicate whether the found	ation is a private operati	ng foundation described	in section	4942(j)(3) or4	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
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(1)(3)(B)(1)					
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 Info			if the foundatio	n had \$5,000 or m	nore in assets
at any time during t	he year-see the	instructions.)			
1 Information Regarding Foundation	n Managers:				
a List any managers of the foundation wh year (but only if they have contributed n			ntributions received by th	ne foundation before the cl	ose of any tax
NONE					
b List any managers of the foundation wh other entity) of which the foundation has			n (or an equally large por	tion of the ownership of a	partnership or
NONE					
2 Information Regarding Contribution Check here ► X if the foundation of				s not accept unsolicited rec	quests for funds. If
the foundation makes gifts, grants, etc.	(see instructions) to ind	ividuals or organizations	under other conditions,	complete items 2a, b, c, ar	nd d.
a The name, address, and telephone num	ber of the person to who	om applications should b	e addressed:		
b The form in which applications should b	ne submitted and inform	ation and materials they	sporly include.	**************************************	
· ·	Sasimila and anorm	and materials tiley			
c Any submission deadlines:					
d Any restrictions or limitations on award	s, such as by geographi	cal areas, charitable field	s, kınds of ınstitutions, o	r other factors:	

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3 Grants and Contributions Paid During the		Pavment		
Recipient	If recipient is an individual,			
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	Or September Services			
,				
SEE STATEMENT 8				00 000
Total b Approved for future payment			▶ 3a	90,000
a Approved for future payment				
NONE				
Total			▶ 3b	0

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Part XVI-A **Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.	Unrelate	d business income		ded by section 512, 513, or 514	(e)
•	(a) Business	(b)	(C) Exclu- sion	(d)	Related or exempt
1 Program service revenue:	code	Amount	code	Amount	function income
a					
b					
C					
d					
е					
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			14	43,792.	
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			L		
7 Other investment income					
8 Gain or (loss) from sales of assets other		<u> </u>			
than inventory			18	<155,212.	· ·
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
- d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		<111,420.	> 0.
13 Total. Add line 12, columns (b), (d), and (e)		<u> </u>			<111,420.
(See worksheet in line 13 instructions to verify calculations.)					
Part XVI-B Relationship of Activities t	o the Acc	omplishment of Ex	(omn	t Purposes	-
relationship of Activities to	U tile Acci				
Line No Explain below how each activity for which inco			contrib	outed importantly to the accor	mplishment of
▼ the foundation's exempt purposes (other than	by providing fu	nds for such purposes).			
					
					··
					
					
		<u> </u>			
		· · · · · · · · · · · · · · · · · · ·			
923621 02-02-10					Form 990-PF (2009)

		PF (2009) COM	<u> IERIC</u>	A BANK,	TRUS	TEE			38-678			ge 13
P	art X\				sfers To	and Trai	nsactions a	and Rela	tionships With Nonch	aritable	•	
		Exempt Or	ganiza	tions					···			
1	Did th	e organization directly o	r indirectly	y engage in any i	of the follow	wing with any	other organizati	on described	I in section 501(c) of		Yes	No
	the Co	ode (other than section 5	501(c)(3)	organizations) oi	r in section	527, relating t	to political organ	nizations?				
a	Trans	fers from the reporting f	oundation	to a noncharital	ble exempt	organization of	of:					
	(1) 0	ash								1a(1)		<u>X</u>
	(2)	ther assets								1a(2)		<u>X</u>
b	Other	transactions:										
	(1) S	ales of assets to a noncl	haritable e	xempt organizat	ion					1b(1)		_X_
	(2) P	urchases of assets from	a noncha	ritable exempt o	rganization	1				1b(2)		_X_
	(3) F	ental of facilities, equipm	nent, or o	her assets						1b(3)		_X
	(4) F	eimbursement arrangen	nents							1b(4)		<u> </u>
	(5) L	oans or loan guarantees	;							1b(5)		<u> </u>
	(6) F	erformance of services (or membe	rship or fundrais	sing solicita	ations				1b(6)		<u>X</u>
C	Sharıı	ng of facilities, equipmen	nt, mailing	lists, other asse	ts, or paid	employees				1c	L	<u>X</u>
d	If the	answer to any of the abo	ove is "Yes	,* complete the f	following so	chedule. Colun	nn (b) should al	ways show t	he fair market value of the goods	, other ass	sets,	
			-				ı faır market valı	ue in any trai	nsaction or sharing arrangement	, show in		
	colun	in (d) the value of the go										
(a)	Line no	(b) Amount involved	d	(c) Name of		ible exempt or	ganization	(d) D	escription of transfers, transactions, an	d sharing an	rangeme	nts
					N/A	<u> </u>						
									<u>.</u>			
								_		-		
	_,											
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2 a		foundation directly or in					x-exempt organ	izations desc	cribed	<u> —</u>	T 17	٦
		tion 501(c) of the Code			(3)) or in s	section 5277				Yes Yes	LA	No
	i it-Ye	s," complete the following (a) Name				(h) Type	of organization	1	(c) Description of relation	nchin		
—		<u>`</u>		ation		(b) Type	or organization	 	(c) Description of relation	ТЭПР		
_		N,	A					 	· · ·			
_									<u>. </u>			
_								 				
_				-			****	+				
_	Underp	enalties of perjury, I declare	that I have o	examined this return	n, including a	ccompanying sc	hedules and stater	ments, and to t	he best of my knowledge and belief, it	is true, corre	ect,	
	and cor	nplete Declaration of prepare	er (other tha	n taxpayer or fiduci	ary) is based	on all informatio	n of which prepare	r has any know	vledge			
e e	S	gnature of officer or trus	stee				ate	Title	··· 			
Ħ.		December 1		5 K2 /)			Date		arer's identif	ying nur	nber
Sign Here	Paid Preparer's Use Only	signature		2X M	<u></u>			5/13/1	⊘ self- employed ► □			
(1)	are	Firm's name (or yours CI	LARK	HILL P.	L.C.		1	17	EIN ►			
	P rep Use	if self-employed), 5 (ODWARD		, SUITE	3500					
	4.3	address, and ZIP code DI		T, MI 4					Phone no. 313	<u>-965-</u>	830	0

Form **990-PF** (2009)

Part IV | Capital Gains and Losses for Tax on Investment Income (b) How acquired (c) Date acquired (a) List and describe the kind(s) of property sold, e.g., real estate, (d) Date sold Purchase (mo., day, yr.) 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo, day, yr.) D - Donation 02/26/08|03/09/09 1a AFLAC INC, 300 SHS 05/01/09|11/30/09 b AGCO CORP, 350 SHS 03/20/03<mark>11/30/09</mark> c AGL RESOURCES, 150 SHS P P 06/05/08|07/10/09 d AT&T INC, 540 SHS P 05/01/0<u>9</u>07/10/09 100 SHS e AT&T INC, 04/02/0705/04/09 f ARTIO GLOBAL INVT FUND. 1954.222 SHS P 573.158 P 09/06/07|05/04/09 INVT FUND, SHS a ARTIO GLOBAL FUND, 395.518 11/22/0408/03/09 P h ARTIO GLOBAL INVT SHS 04/02/07|11/30/09 ARTIO GLOBAL INVT FUND, 832.054 SHS P P 10/30/07|07/10<u>/09</u> AUTOMATIC DATA PROCESSING, 345 SHS <u>01/10/08|07</u>/10<u>/</u>09 P k AUTOMATIC DATA PROCESSING, 100 SHS | AUTOMATIC DATA PROCESSING, 50 SHS P 01/18/0807/10/09 P 02/20/0401/15/09 m BP CANADA FINANCE, 25000 n BROADCOM CORP, 150 SHS 12/16/08|11/30<u>/09</u> P 10/30/0711/30/09 o COCA COLA CO, 50 SHS Ρ (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss) (e) Gross sales price (e) plus (f) minus (a) (or allowable) plus expense of sale 19,431. <16,022.> 3,409. a 8,918. 1,603. 10,521. b 1,650. 5,113. 3,463. С 21,394. 12,566. <8.828.> d 2,327. 2,596. <269.> е 88,507. <42,114.> 46,393 <13,658.> 13,607 27,265. g <348.> 11,130 11,478. h <12,706.> 24,978 37,684. 11,607 16,836. <u><5,229.</u>> 4,178. 3,364 <814.> k 1,985. <303.> 1,682 25,329. <329.> 25,000 m 1,569. 4,353 2,784. n 2.851. 3,077. <226.> 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col (h) gain over col. (k), (j) Adjusted basis (k) Excess of col. (i) (i) F M.V. as of 12/31/69 but not less than "-0-") as of 12/31/69 over col. (j), if any <16,022.> a 1,603. b 1,650. C <8,828.> d <269.> е <42,114.> <13,658.> <348.> h <12,706.> <5,229.> <814.> <303.> <3<u>29.</u>> m 1,569. n <226.> 0 { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 } Capital gain net income or (net capital loss) 2 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8

Part IV Capital Gains and Losses for Tax on Investment Income (b) How acquired (c) Date acquired (a) List and describe the kind(s) of property sold, e.g., real estate, (d) Date sold 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo., day, yr.) (mo., day, yr.) D - Donation 1a CONOCOPHILLIPS, 105 SHS 06/09/04|11/30/09 P b CUMMINS ENGINE, 300 SHS P |01/10/08|05/21/09 P 01/18/08|05/21/09 c CUMMINS ENGINE, 100 SHS P 08/26/0805/04/09 d DWS DREMAN SMALL CAP, 1915. 403 08/26/0812/29/09 e DWS DREMAN SMALL CAP, 515.519 SHS P 10/13/0803/10/09 f DWS DREMAN SMALL CAP, 350 SHS P 10/21/0911/30/09 P g EMC CORP, 50 SHS 05/21/09|11/30/09 h EBAY INC., 150 SHS P | ELECTRONIC ARTS, 800 SHS P 05/01/09|08/26/09 05/22/9504/27/09 JEXXON MOBIL, 180 SHS P P 05/16/9604/27/09 k EXXON MOBIL, 53 SHS 03/09/0911/30/09 350 P | FEDERATED INVESTORS, SHS 08/23/06<u>10/21/09</u> m FLUOR CORP, 50 SHS P 04/02/07|10/21/09 n FLUOR CORP, 50 SHS P 04/02/07|11/30<u>/09</u> o FLUOR CORP 50 SHS Р (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss) (e) Gross sales price (or allowable) plus expense of sale (e) plus (f) minus (g) 1,499. 3,894. 5,393 a 15,436. <5,848.> 9,588. 3,196. 4,320. <1,124.> C 48,000. 63,687. <15,687.> d 15,481. 17,141. <1,660.> 6 12,557. <6,790.> 5,767. 832. 889. <57.> g 1,052. 2,565. 3,617. h 15,273. <759.> <u>16,032.</u> 8,710. 3,151. 11,861. 1,130. 3,492. 2,362. 2,971. 8,939 5,968. 2,127. 438. 2,565 m 2,264. 301. 2,565. n <145.> 2,119. 2,264. 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (j) Adjusted basis (k) Excess of col. (i) but not less than "-0-") (i) F.M.V as of 12/31/69 as of 12/31/69 over col. (j), if any 1,499. <5,848.> b <1,124.> <15,687.> d <1,660.> <6,790.> <57.> g 1,052. h <759.> 8,710. 2,362. 2,971. 1 438. m 301. n <145.> 0 { If gain, also enter in Part I, line 7 | If (loss), enter "-0-" in Part I, line 7 } 2 Capital gain net income or (net capital loss) 2 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8

CONTINUATION FOR 990-PF, PART IV 38-6781068 PAGE 3 OF

. I CITTY Capital Gains and Los	2262 IOL LAY OIL HIAGSTHELL HICOLIFE			
	describe the kind(s) of property solution describe the kind(s) of property solution (s) described the kind(s) describe			(c) Date acquired (d) Date sold (mo., day, yr.)
	 		D - Donation	1
1a FLUOR CORP, 12			P	01/10/0811/30/09
b GAMESTOP CORP,	500 SHS		P	05/21/0908/03/09
c GENERAL MILLS,	100 SHS		P	02/26/0811/30/09
d GILEAD SCIENCE			P	10/28/0511/30/09
e HOUSEHOLD FIN			P	08/05/0505/15/09
f IBM CORP, 40 S			P	10/30/0705/21/09
			P	10/30/0711/30/09
h IBM CORP, 20 S			P	01/10/08/11/30/09
JABIL CIRCUIT,			P	04/08/08/03/10/09
JOHNSON & JOHN			P	04/02/0711/30/09
k KROGER, 450 SH			P	12/16/08/08/03/09
L-3 COMMUNICAT	IONS, 150 SHS		P	02/14/0305/21/09
m L-3 COMMUNICAT			P	04/08/0805/21/09
n LABORATORY COR		S	P	04/30/0311/30/09
o LAZARD EMERGIN			P	05/04/0908/03/09
U DAZAKO EMEKGIN				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale) Gain or (loss) plus (f) minus (g)
a 5,087.		8,465.		<3,378.>
b 11,302.		11,139.		163.
c 6,789.		5,793.		996.
0.005		1,165.		1,132.
				<175.>
e 50,000.		50,175.		
<u>1</u> 4,099.		4,565.		<u><466.</u> >
g 2,516.		2,282.		234.
h 2,516.		1,996.		520.
6,527.		20,049.		<13,522.>
6,262.		6,018.		244.
k 9,667.		11,837.		<2,170.>
10,679.		5,841.		4,838.
m 3,560.		5,556.		<1,996.>
n 5,824.		2,358.		3,466.
0 4,908.		3,963.		945.
	ng gain in column (h) and owned by		(1)10	sses (from col. (h))
(i) F M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (ı) over col. (ı), ıf any	Gains (excess	of col. (h) gain over col. (k), not less than "-0-")
a				<3,378.>
b				163.
c				996.
d				1,132.
				<175.>
<u>e</u>		-		<466.>
1		 	· ·	
<u>g</u>		 	<u>-</u>	234.
<u>h</u>				520.
1				<13,522.>
1				244.
<u>k</u>				<u><2,170.</u> >
				4,838.
m				<1,996.>
n				3,466.
0			· -	945.
	r If gain, also enter	r in Part I, line 7		
2 Capital gain net income or (net ca	, (1033), citici (, I	2	
3 Net short-term capital gain or (los if gain, also enter in Part I, line 8, if (loss), enter "-0-" in Part I, line 8	column (c).)	3	
			- •	

Part IV Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase (a) List and describe the kind(s) of property sold, e.g., real estate, (c) Date acquired (d) Date sold 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo., day, yr.) (mo., day, yr.) D - Donation 1a LAZARD EMERGING MARKETS, 609.443 05/04/09|11/30/09 Ρ b LAZARD EMERGING MARKETS, 222.841 SHS P 05/04/09|12/29/09 P 01/18/0805/21/09 c MCDONALDS CORP, 150 SHS 01/18/0808/26/09 d MCDONALDS CORP, 200 SHS P e MCDONALDS CORP, 50 SHS P 04/08/08|08/26/09 f METLIFE CORP, 365 SHS P 01/10/08|03/10/09 g METLIFE CORP, 50 SHS P 04/08/08|03/10/09 P 01/19/9502/11/09 365 SHS h MICROSOFT, 150 SHS P 04/02/07|02/11/09 MICROSOFT, P 09/06/07|02/11/09 __ MICROSOFT, 100 SHS 100 SHS P 04/08/08|02/11/09 k MICROSOFT, 03/09/09|11/30/09 | MONSANTO, 200 SHS P 02/11/09<mark>08/03/09</mark> m MYLAN LABS, 800 SHS P P 02/11/09|11/30/09 200 SHS n MYLAN LABS, NYSE EURONEXT 100 SHS P |02/11/09|11/30<u>/09</u> (g) Cost or other basis (h) Gain or (loss) (f) Depreciation allowed (e) Gross sales price (or allowable) plus expense of sale (e) plus (f) minus (g) 2,846. 10,842 7,996. a 2,924. 1,076. 4,000. 453. 8,334. 7,881. C 11,400. 10,508. 892. đ 2,794. 2,850. 56. 17,959. <13,993.> 3,966. 3,104. <2.443.> 661. g 7,056. 5,569. 1,487. h 2,900. 4,150 <1,250.> <974.> 1,933. 2,907. 1,933. 2,885. <952.> 16,062. 1,502. 14,560. 10,754 9,472. 1,282. m 3,550. 2,368. 1,182. n 2,483. 2,034. 449. 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (j) Adjusted basis (k) Excess of col. (i) (i) F M.V. as of 12/31/69 but not less than "-0-") as of 12/31/69 over col. (i), if any 2,846. a 1,076. b 453. C 892. d 5<u>6</u>. е <13,993.> <2,443.> q 5,569. h <1,250.> <974.> k <952.> 1,502. 1,282. m 1,182. 449. 0 { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 2 Capital gain net income or (net capital loss) 2 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8

Part IV | Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase (c) Date acquired (d) Date sold (a) List and describe the kind(s) of property sold, e.g., real estate, (mo., day, yr.) (mo., day, yr.) 2-story brick warehouse; or common stock, 200 shs. MLC Co. D - Donation 1a NETAPP INC., 08/26/0911/30/09 150 SHS P b NICOR INC., 268 SHS P 08/26/08|10/21/09 c NICOR INC., 132 SHS P 08/26/0810/21/09 d NIKE INC., 100 SHS P 09/06/07|11/30/09 P 05/01/09|11/30/09 e OCCIDENTAL PETE, 120 ORACLE CORP, 600 SHS P |07/13/98|10/21/09 g ORACLE CORP, 50 SHS P 07/13/9811/30/09 P 02/19/0403/02/09 25000 h PFIZER INC.. P 102/22/05|08/26/09 | PROCTOR & GAMBLE, 175 SHS 04/02/07|08/26/09 PROCTOR & GAMBLE, 50 SHS P P |09/06/07|08/26/09 k PROCTOR & GAMBLE, 50 SHS P 04/02/07|12/29/09 | RAINIER SM/MID CAP, 383.282 SHS 04/02/07|11/30/09 m RAINIER SM/MID CAP, 1258.168 SHS P n RAINIER SM/MID CAP, 207.56 SHS P 09/06/07|12/29/09 05/01/0911/30/09 o SCLUMBERGER, 100 SHS Р (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss) (e) Gross sales price plus expense of sale (e) plus (f) minus (g) (or allowable) 1,215. 4,560. 3,345 a <1,972.> 10,171. 12,143. b <921.> 5,060. 5.981. C 6,453. 5,621. 832. d 6,986. 2,638. 9,624. е 2,543. 10,765. 13,308. 881. 1,093. 212. g 25,153. <153.> 25,000. h 139. 9,344 9,205. 2,670. 3,149. <479.> 2,670 3,312. <642.> 10,379 <4,910.> 15,289. 1 31,56750,188. <18,621.> m <3,555.> 5,621. 9,176. n 5,046. 6,341. 1,295. 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (j) Adjusted basis (k) Excess of col. (i) but not less than "-0-") (i) F.M.V. as of 12/31/69 as of 12/31/69 over col. (j), if any 1,215. a <1,972.> h <921.> 832. d 2,638. е 10,765. 881. g <153.> h 139. <479.> <642.> <4,910.> <18,621.> m <3,555.> n 1,295. 0 { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 } Capital gain net income or (net capital loss) 2 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8

COMERICA BANK, TRUSTEE Part IV | Capital Gains and Losses for Tax on Investment Income (b) How acquired (c) Date acquired (a) List and describe the kind(s) of property sold, e.g., real estate, (d) Date sold 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo., day, yr.) (mo., day, yr.) D - Donation 1a SEACOR HOLDINGS, 40 SHS P 02/26/08|11/30/09 P 08/26/08|05/21/09 b SOUTHERN CO, 500 SHS c STATE STREET CORP, 170 SHS P 10/21/0402/11/09 P 09/06/07|02/11/09 d STATE STREET CORP, 50 SHS 01/10/08|11/30/09 e STRYKER CORP, 50 SHS P f TRAVERLERS COS, 100 SHS P 05/01/09|11/30/09 08/26/09|11/30/09 g TYSON FOODS INC., 50 SHS P P 12/16/08|11/30/09 250 SHS h US BANCORP, P 08/23/06|03/10/09 UNITED TECHNOLOGIES, 50 SHS P 04/02/07|03/10/09 <u> UNITED</u> TECHNOLOGIES, 200 SHS 50 SHS P 04/08/08|03/10/09 k UNITED TECHNOLOGIES, 10/31/03|05/21/09 P | WATERS CORP, 200 SHS P 04/02/07|05/21/09 m WATERS CORP, 50 SHS 04/08/0805/21/09 P 100 SHS n WATERS CORP, <u> 10/21/0912/24/</u>09 o XTO ENERGY INC., 150 SHS P (a) Cost or other basis (h) Gain or (loss) (f) Depreciation allowed (e) Gross sales price (e) plus (f) minus (g) (or allowable) plus expense of sale 3,881 3,050 <831.> a 18,819. <5,179.> 13,640. 4.814. 7,389. <2,575.> С 1,416. 3,143. <1,727.> d <988.> 2,497. 3,485. 4,104. 1,085. 5,189. 595. 607. <12.> g <491.> 5,928 6,419 h <1,124.> 1,911 3,035. 12,973. <5,330.> 7,643. 3,587. <1,676.> 1,911. 714 6,295. 2,419. 2,179 2,912. <733.> m 4,357. 5,634. <1,277.> n 7,075. 6,935. 140. 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (k) Excess of col. (i) (j) Adjusted basis but not less than "-0-") (i) F.M.V. as of 12/31/69 as of 12/31/69 over col (i), if any <831.> a <5,179.> b <2,575.> C <1,727.> d <988.> е 1,085. <12.> g <491.> h <1,124.> <5,330.> k <1,676.> 2,419. <733.> m <1,277.> 140. 0 { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 } 2 Capital gain net income or (net capital loss) 2 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):

If gain, also enter in Part I, line 8, column (c).

If (loss), enter "-0-" in Part I, line 8

Capital Gains and Los	SSES IOI TAX OII IIIVESUIIEIIL IIICUIIIE	-		,	
2-story br	describe the kind(s) of property so ick warehouse; or common stock, 2	200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(*****)
1a DWS DREMAN SMA	LL CAP, 156.593	SHS	P	08/26/08	12/29/09
b PHILLIP MORRIS			P	08/03/09	11/30/09
c CAPITAL GAINS			- 		
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	(f) Depreciation allowed	(g) Cost or other basis	<u> </u>) Gain or (loss)	
(e) Gross sales price	(or allowable)	plus expense of sale	(e)	plus (f) minus (g)	
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	ng gain in column (h) and owned by	the foundation on 12/31/69	(1) 1 0	sses (from col. (h))	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis	(k) Excess of col. (I)	Gains (excess	of col. (h) gain over not less than "-0-")	r col. (k),
(1)1.10.0. 43 01 12/3 1/03	as of 12/31/69	over col. (j), if any		inot icss than 0 /	
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	, If noin also onto	er in Part I line 7			
Capital gain net income or (net ca	pital loss) { if (loss), enter "-	er in Part I, line 7 -0-" in Part I, line 7		<	155,212
Net short-term capital gain or (los		, I			
If gain, also enter in Part I, line 8,		\			
If (loss), enter "-0-" in Part I, line 8		J 1	:	N/A	

S AND	INTER	EST FROM	SECUR	ITIES	STATEMENT	1
	GROSS	AMOUNT			COLUMN (A AMOUNT	.)
-		43,792.		0.	43,7	92.
		969.		969.		0.
N 4		44,761.		969.	43,7	92.
	LEGAL	FEES	-		STATEMENT	2
EXPE	NSES					
	2,434.	2	,434.			0.
	2,434.	2	,434.			0.
THER	PROFES:	SIONAL F	EES		STATEMENT	3
EXPE	NSES					
	20.		20.			0.
	20.		20.			0.
					OM 3 MENUTATION	
	TAX	ES			STATEMENT	4
EXPE	TAXI A) NSES BOOKS	(B) NET INV	EST-	(C) ADJUSTED NET INCOM	(D) CHARITA	BLE
EXPE	A) NSES	(B)	EST-	ADJUSTED	(D) CHARITA	BLE
	N 4 EXPE	GROSS N 4 LEGAL (A) EXPENSES PER BOOKS 2,434. 2,434. THER PROFES (A) EXPENSES PER BOOKS 20.	GROSS AMOUNT 43,792. 969. N 4 44,761. LEGAL FEES (A) (B) EXPENSES NET INV. PER BOOKS MENT INC. 2,434. 2 2,434. 2 THER PROFESSIONAL FINAL EXPENSES NET INV. PER BOOKS MENT INC. (A) (B) EXPENSES NET INV. PER BOOKS MENT INC. 20.	GROSS AMOUNT DI 43,792. 969. N 4 44,761. LEGAL FEES (A) (B) EXPENSES NET INVEST- PER BOOKS MENT INCOME 2,434. 2,434. 2,434. 2,434. THER PROFESSIONAL FEES (A) (B) EXPENSES NET INVEST- PER BOOKS NET INVEST- PER BOOKS MENT INCOME 20. 20.	43,792. 0. 969. 969. N 4 44,761. 969. LEGAL FEES (A) (B) (C) EXPENSES NET INVEST- PER BOOKS MENT INCOME NET INCOME 2,434. 2,434. 2,434. 2,434. THER PROFESSIONAL FEES (A) (B) (C) EXPENSES NET INVEST- PER BOOKS MENT INCOME NET INCOME 20. 20.	GROSS AMOUNT DIVIDENDS AMOUNT 43,792. 0. 43,7 969. 969. N 4 44,761. 969. 43,7 LEGAL FEES STATEMENT (A) (B) (C) (D) EXPENSES NET INVEST- ADJUSTED CHARITA PER BOOKS MENT INCOME NET INCOME PURPOS 2,434. 2,434. 2,434. 2,434. THER PROFESSIONAL FEES STATEMENT (A) (B) (C) (D) (D) EXPENSES NET INVEST- ADJUSTED CHARITA PER BOOKS MENT INCOME NET INCOME PURPOS 20. 20. 20.

FORM 990-PF	CORPORATE STOCK		STATEMENT 5
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
STOCKS/EQUITIES FOREIGN STOCK		453,350. 17,148.	525,329. 21,488.
TOTAL TO FORM 990-PF, PART II	I, LINE 10B	470,498.	546,817.
FORM 990-PF	CORPORATE BONDS		STATEMENT 6
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS FOREIGN BONDS		90,812.	94,983.
TOTAL TO FORM 990-PF, PART I	I, LINE 10C	90,812.	94,983.
FORM 990-PF	OTHER INVESTMENTS		STATEMENT 7
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS MUTUAL FUNDS	COST	350,553. 428,573.	303,949. 431,751.
TOTAL TO FORM 990-PF, PART I	I, LINE 13	779,126.	735,700.

	AND CONTRIBUTIONS DURING THE YEAR	STAT	EMENT 8
RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
CAPUCHIN SOUP KITCHEN	NONE GENERAL OPERATING SUPPORT	PUBLIC CHARITY	5,000.
COALITION OF TEMPORARY SHELTER	NONE GENERAL OPERATING SUPPORT	PUBLIC CHARITY	5,000.
MOSAIC YOUTH THEATRE OF DETROIT	NONE GENERAL OPERATING SUPPORT	PUBLIC CHARITY	5,000.
ST PATRICK'S SENIOR CENTER	NONE GENERAL OPERATING SUPPORT	PUBLIC CHARITY	5,000.
WIGS 4 KIDS	NONE GENERAL OPERATING SUPPORT	PUBLIC CHARITY	5,000.
DETROIT LIBRARY FOUNDATION	NONE GENERAL OPERATING SUPPORT	PUBLIC CHARITY	5,000.
DETROIT 300 CONSERVANCY	NONE GENERAL OPERATING SUPPORT	PUBLIC CHARITY	7,500.
STRATFORD SHAKESPEAREAN FESTIVAL OF AMERICA	NONE GENERAL OPERATING SUPPORT	PUBLIC CHARITY	5,000.

GENERATION IV CHARITABLE TRUST	COMERICA		38-6781068
PARADE COMPANY	GENERAL OPERATING SUPPORT	PUBLIC CHARITY	5,000.
DETROIT PUBLIC TELEVISION	NONE GENERAL OPERATING SUPPORT	PUBLIC CHARITY	5,000.
DETROIT ECONOMIC CLUB	NONE GENERAL OPERATING SUPPORT	PUBLIC CHARITY	2,500.
ERNIE HARWELL FOUNDATION	NONE GENERAL OPERATING SUPPORT	PUBLIC CHARITY	5,000.
COLLEGE FOR CREATIVE STUDIES	NONE ARGONAUT PROJECT	PUBLIC CHARITY	5,000.
HENRY FORD MACOMB HOSPITAL	NONE NEIGHBORS CARING FOR NEIGHBORS PROGRAM	PUBLIC CHARITY	10,000.
INLAND SEAS EDUCATION ASSOCIATION	NONE GREAT LAKES SCHOOLSHIP PROGRAM	PUBLIC CHARITY	5,000.
DETOIT SCIENCE CENTER	NONE ATTENDANCE OF DETROIT UNDERPRIVILEGED CHILDREN	PUBLIC CHARITY	5,000.
TURNING POINT, INC.	NONE SHELTER FOR DOMESTIC VIOLENCE VICTIMS	PUBLIC CHARITY	5,000.
TOTAL TO FORM 990-PF, PART XV, L	INE 3A		90,000.

'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

Form 8868 (Rev. 4-2009)

• If yo	ou are filing for an Automatic 3-Month Extension, complete only Part I and check this box		ightharpoons
•	ou are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this		
Do no	t complete Part II unless you have already been granted an automatic 3-month extension on a previously fi	led Fo	rm 8868
Par	Automatic 3-Month Extension of Time. Only submit original (no copies needed).		
A corr	poration required to file Form 990·T and requesting an automatic 6·month extension - check this box and con	nplete	
Part I			▶ □
All oth	er corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request a	exten	sion of time
	income tax returns.		
noted (not a you m	conic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electron butomatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or conjust submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic files. Government of the files on e-file for Charities & Nonprofits.	ically if nsolida	(1) you want the additional ated Form 990-T Instead,
Туре	or Name of Exempt Organization	Emp	loyer identification number
print	GENERATION IV CHARITABLE TRUST		
File by t	COMERICA BANK, TRUSTEE	3	<u>8-6781068</u>
due date	e for Number, street, and room or suite no. If a PO box, see instructions		
return S	66		
	DETROIT, MI 49275-9413		
Checi	type of return to be filed (file a separate application for each return)		
=	Form 990		
$\overline{}$	Form 990-EZ Form 990-T (trust other than above) Form 6		
	Form 990-PF Form 1041-A Form 8		
	10111 050 1		
	SCOTT A. DROGS, COMERICA BANK,		
	books are in the care of P.O. BOX 75000, MC 9413, DETROIT, MI –	48	275
	ephone No ► 734-930-2416 FAX No ►		
	ne organization does not have an office or place of business in the United States, check this box		• II • • • • • • • • • • • • • • • • •
box D	nis is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If th		
	init is for part of the group, check this box	memb	ers 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 uni	n i	
	AUGUST 15, 2010 , to file the exempt organization return for the organization named a	bove	The extension
	is for the organization's return for		
	∑ calendar year <u>2009</u> or		
	tax year beginning, and ending		_·
2	If this tax year is for less than 12 months, check reason		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	\$ 223.
	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_	\$ 2,671.
	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.
Cauti	on. 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

For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form **8868** (Rev. April 2009)

(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				
If you	are filing for an Automatic 3-Month Extension, complete only Part I and check this box are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this	form).		X
-	complete Part II unless you have already been granted an automatic 3-month extension on a previously fi			
Part I	Automatic 3-Month Extension of Time. Only submit original (no copies needed).			
A corpor	ration required to file Form 990-T and requesting an automatic 6-month extension - check this box and com ly	nplete	,	
	corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an come tax returns.	exten	sion of time	
noted be (not auto you mus	nic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronic matic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or control to the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filegov/efile and click on e-file for Chanties & Nonprofits	ically if nsolida	f (1) you want the a ated Form 990-T. I	additional
Type or	Name of Exempt Organization	Emp	loyer identification	n number
print	BETHINE S. WHITNEY II FUND			
-	BETHINE S. WHITNEY, TRUSTEE	3	8-2956555	
File by the due date for filing your	44 PINE COURT			
return See instructions				
Check t	ype of return to be filed(file a separate application for each return)			
	rm 990 Form 990-T (corporation) Form 47	720		
1 1 5		זכינ		
=	rm 990-BL Form 990-T (sec. 401(a) or 408(a) trust) Form 52			
F	rm 990-EZ Form 990-T (trust other than above) Form 60	069		
F		069		
T Fo	rm 990-EZ Form 990-T (trust other than above) Form 60 rm 990-PF Form 1041-A Form 86 BETHINE WHITNEY	069 370	236	
Fo X Fo	Form 990-EZ Form 990-T (trust other than above) Form 60 Form 1041-A Form 88 BETHINE WHITNEY BOOKS are in the care of 44 PINW COURT - GROSSE POINTE FARMS, MI	069 370	236	
• The b	Form 990-EZ rm 990-PF Form 1041-A BETHINE WHITNEY sooks are in the care of 44 PINW COURT - GROSSE POINTE FARMS, MI shone No. 313-881-9659 FAX No	069 370	236	—— ▶ □
• The to Telep	Form 990-EZ rm 990-PF Form 1041-A BETHINE WHITNEY blocks are in the care of 44 PINW COURT - GROSSE POINTE FARMS, MI hone No. 313-881-9659 FAX No organization does not have an office or place of business in the United States, check this box	069 370 : 48	.)	check this
• The b	Form 990-EZ rm 990-PF Form 1041-A BETHINE WHITNEY sooks are in the care of 44 PINW COURT - GROSSE POINTE FARMS, MI shone No. 313-881-9659 FAX No	069 370 	r the whole group,	
The to Telep If the lifthis box	Form 990-EZ If prom 990-EZ If prom 990-PF BETHINE WHITNEY BOOKS are in the care of ► 44 PINW COURT - GROSSE POINTE FARMS, MI Thone No. ► 313-881-9659 FAX No ► Organization does not have an office or place of business in the United States, check this box Is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) If the lift it is for part of the group, check this box and attach a list with the names and EINs of all equest an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time unterpretation.	269 370 48 is is fo memb	r the whole group, ers the extension	
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Form **8868**(Rev. April 2009)

Department of the Treasury Infernal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

File a separate application for each return.

OMB No. 1545-1709

Form 8868 (Rev. 4-2009)

● If vou a	are filing for an Automatic 3-Month Extension, complete only Part I and check this box		. ▶ 🗓	
	are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2			
Do not co	omplete Part II unless you have already been granted an automatic 3-month extension on a previo	usly filed Fo	rm 88 68! 🍑 🥌 🗓	
Part I	Automatic 3-Month Extension of Time. Only submit original (no copies needed).			
A corpora	ation required to file Form 990-T and requesting an automatic 6-month extension - check this box an	d complete		
Part I only	у		▶ □	
All other c	corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to requ	est an exter	nsion of time	
	ome tax returns.			
noted beli (not autor you must	ic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic ex low (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 ele- matic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite t submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electro- gov/efile and click on e-file for Chanties & Nonprofits.	ectronically if or consolid	f (1) you want the addition: ated Form 990-T. Instead,	al
Type or	Name of Exempt Organization	Emp	loyer identification numb	oer
print	BETHINE S. WHITNEY II FUND			
File by the	BETHINE S. WHITNEY, TRUSTEE	3	8-2956555	
File by the due date for filing your return See	Number, street, and room or suite no. If a P O. box, see instructions. 44 PINE COURT			
instructions	City, town or post office, state, and ZIP code. For a foreign address, see instructions. GROSSE POINTE FARMS, MI 48236			
Check ty	rpe of return to be filed (file a separate application for each return)			
For	rm 990 Form 990-T (corporation)	orm 4720		
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X For	BETHINE WHITNEY	orm 8870		
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