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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 (77)

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 SCHNEIDER NATIONAL FOUNDATION, INC.		A Employer identification number 39-1457870
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number (see page 10 of the instructions) (920) 592-2000
	P O. BOX 2545		
	City or town, state, and ZIP code GREEN BAY WI 54306-2545		
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			C If exemption application is pending, check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 87,681			D 1. Foreign organizations, check here <input type="checkbox"/>
J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)			2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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)	550,065			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	0	0		
	4 Dividends and interest from securities	0	0		
	5 a Gross rents		0		
	b Net rental income or (loss)	0			
	6 a Net gain or (loss) from sale of assets not on line 10	0			
	b Gross sales price for all assets on line 6a	0			
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10 a Gross sales less returns and allowances	0			
b Less Cost of goods sold	0				
c Gross profit or (loss) (attach schedule)	0				
11 Other income (attach schedule)	0	0	0		
12 Total. Add lines 1 through 11	550,065	0	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16 a Legal fees (attach schedule)	0	0		0
	b Accounting fees (attach schedule)	0	0		0
	c Other professional fees (attach schedule)	0	0		0
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	0	0	0	0
	19 Depreciation (attach schedule) and depletion	0	0	0	
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	0	0	0	0
	24 Total operating and administrative expenses. Add lines 13 through 23	0	0	0	0
	25 Contributions, gifts, grants paid	531,661			531,661
26 Total expenses and disbursements. Add lines 24 and 25	531,661	0	0	531,661	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	18,404				
b Net investment income (if negative, enter -0-)		0			
c Adjusted net income (if negative, enter -0-)			0		

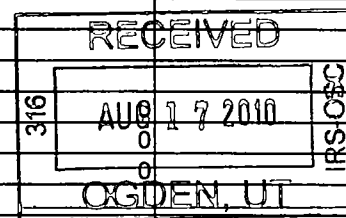
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Form **990-PF** (2009)

(HTA)

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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	69,277	87,681	87,681
	2 Savings and temporary cash investments			
	3 Accounts receivable <input type="checkbox"/> 0			
	Less allowance for doubtful accounts <input type="checkbox"/> 0	0	0	0
	4 Pledges receivable <input type="checkbox"/> 0			
	Less allowance for doubtful accounts <input type="checkbox"/> 0	0	0	0
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)	0	0	0
	7 Other notes and loans receivable (attach schedule) <input type="checkbox"/> 0			
	Less allowance for doubtful accounts <input type="checkbox"/> 0	0	0	0
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10 a Investments—U S and state government obligations (attach schedule)	0	0	0
	b Investments—corporate stock (attach schedule)	0	0	0
	c Investments—corporate bonds (attach schedule)	0	0	0
Liabilities	11 Investments—land, buildings, and equipment basis <input type="checkbox"/> 0			
	Less accumulated depreciation (attach schedule) <input type="checkbox"/> 0	0	0	0
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	0	0	0
	14 Land, buildings, and equipment basis <input type="checkbox"/> 0			
	Less accumulated depreciation (attach schedule) <input type="checkbox"/> 0	0	0	0
Net Assets or Fund Balances	15 Other assets (describe <input type="checkbox"/>)	0	0	0
	16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	69,277	87,681	87,681
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons	0	0	
	21 Mortgages and other notes payable (attach schedule)	0	0	
	22 Other liabilities (describe <input type="checkbox"/>)	0	0	
	23 Total liabilities (add lines 17 through 22)	0	0	
	Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	69,277	87,681	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see page 17 of the instructions)	69,277	87,681	
	31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	69,277	87,681	

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	69,277
2 Enter amount from Part I, line 27a	2	18,404
3 Other increases not included in line 2 (itemize) <input type="checkbox"/>	3	0
4 Add lines 1, 2, and 3	4	87,681
5 Decreases not included in line 2 (itemize) <input type="checkbox"/>	5	0
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	87,681

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a	0	0	0	0
b	0	0	0	0
c	0	0	0	0
d	0	0	0	0
e	0	0	0	0
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 Losses (from col. (h))
(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		
a	0	0	0	0
b	0	0	0	0
c	0	0	0	0
d	0	0	0	0
e	0	0	0	0
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 { If (loss), enter -0- in Part I, line 7	2	0		
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	0		

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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			0.000000
2007			0.000000
2006			0.000000
2005			0.000000
2004			0.000000
2 Total of line 1, column (d)			0.000000
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			0.000000
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5		40,827	
5 Multiply line 4 by line 3			0
6 Enter 1% of net investment income (1% of Part I, line 27b)			0
7 Add lines 5 and 6			0
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			531,661

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

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

Part VII-A Statements Regarding Activities

	Yes	No
1 a 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 <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
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
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) <input type="checkbox"/> WI		
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?	13	X	

Website address ☐ _____

14 The books are in care of ☐ SCHNEIDER NATIONAL, INC C/O L. OSKEY Telephone no ☐ (920) 592-2000
 Located at ☐ 3101 S. PACKERLAND DR. GREEN BAY WI ZIP+4 ☐ 54306-2545

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

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1b	N/A
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <input type="checkbox"/> 20 _____, 20 _____, 20 _____, 20 _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <input type="checkbox"/> 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))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions)

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?**5b**

N/A

Organizations relying on a current notice regarding disaster assistance check here

☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945–5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**6b**

X

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**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
STEVE MATHEYS P O BOX 2545 GREEN BAY WI 54306-2545	NOMINAL PRESID .00	0	0	0
LUELLEN OSKEY P O BOX 2545 GREEN BAY WI 54306-2545	NOMINAL SEC/TR 00	0	0	0
	00	0	0	0
	.00	0	0	0

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		0
.....		0
.....		0
.....		0
.....		0
.....		0

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 NONE	
.....	
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 NONE	
.....	
2	
.....	
All other program-related investments. See page 24 of the instructions.	
3	
.....	0
Total. Add lines 1 through 3	0

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	
b	Average of monthly cash balances	1b	40,827
c	Fair market value of all other assets (see page 24 of the instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	40,827
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	40,827
4	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	0
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	40,827
6	Minimum investment return. Enter 5% of line 5	6	2,041

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	2,041
2a	Tax on investment income for 2009 from Part VI, line 5	2a	0
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	0
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,041
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	2,041
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	2,041

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	531,661
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		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	531,661
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	531,661

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				2,041
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0	
b Total for prior years. 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2009				
a From 2004	342,994			
b From 2005	665,173			
c From 2006	602,147			
d From 2007	559,068			
e From 2008	792,566			
f Total of lines 3a through e	2,961,948			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 531,661				
a Applied to 2008, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)	0			
d Applied to 2009 distributable amount				2,041
e Remaining amount distributed out of corpus	529,620			
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	3,491,568			
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				
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions		0		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see 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)	342,994			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	3,148,574			
10 Analysis of line 9				
a Excess from 2005	665,173			
b Excess from 2006	602,147			
c Excess from 2007	559,068			
d Excess from 2008	792,566			
e Excess from 2009	529,620			

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)**N/A**

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling



b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

b 85% of line 2a

c Qualifying distributions from Part XII, line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities
Subtract line 2d from line 2c

3 Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test—enter

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c "Support" alternative test—enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Tax year	Prior 3 years			(e) Total
(a) 2009	(b) 2008	(c) 2007	(d) 2006	
0				0
0	0	0	0	0
531,661	795,970	561,454	605,753	2,494,838
				0
531,661	795,970	561,454	605,753	2,494,838
				0
1,361	2,269	1,591	2,404	7,625
				0
				0
				0
				0

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see page 28 of the instructions.)**1 Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

NONE

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

NONE

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

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number of the person to whom applications should be addressed

LUELLEN OSKEY P O BOX 2545 GREEN BAY WI 54306-2545 (920) 592-2000

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

NO PRESCRIBED FORM

c Any submission deadlines

NO SUBMISSION DEADLINES

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

NO RESTRICTIONS OR LIMITATIONS

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i> SEE ATTACHED	NONE		GENERAL	531,661
Total			▶ 3a	531,661
b <i>Approved for future payment</i>				
Total			▶ 3b	0

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2009

Name of the organization

Employer identification number

SCHNEIDER NATIONAL FOUNDATION, INC.

39-1457870

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☐ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II

Special Rules

- ☒ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization

SCHNEIDER NATIONAL FOUNDATION, INC

Employer identification number

39-1457870

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	SCHNEIDER NATIONAL, INC PO BOX 2545 GREEN BAY WI 54306-2545 Foreign State or Province Foreign Country	\$ 550,065	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
2	 Foreign State or Province Foreign Country	\$ 0	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
3	 Foreign State or Province Foreign Country	\$ 0	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
4	 Foreign State or Province Foreign Country	\$ 0	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
5	 Foreign State or Province Foreign Country	\$ 0	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
6	 Foreign State or Province Foreign Country	\$ 0	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

SCHNEIDER NATIONAL FOUNDATION, INC
2009 LISTING OF CONTRIBUTIONS PAID

Recipient	Check #	January	February	March	April	May	June	July	August	September	October	November	December
Druid Hills Elementary School (Charlotte OC)	2180		2 000 00										
City of Gary Police Dept (Gary OC)	2217			1 500 00									
Miracle Michael (APS OC)	2229		1 650 00										
Easter Seals Joliet Region (APS OC)	2230	1 650 00											
Salvation Army (Farmington Hills OC)	2239	500 00											
J W Rich Girls Club (W Memphis OC)	2247	1 000 00											
Ronald McDonald House Charities of the Coastal Empire (APS OC)	2249	1 300 00											
Hope House of Savannah (APS OC)	2250	1 000 00											
American Cancer Society (Dallas OC)	2256		2 000 00										
Manna House (Dallas OC)	2258	1 500 00											
Waterford Youth Assistance (Farmington Hills OC)	2260	500 00											
Savannah Area Family Emergency Shelter (APS OC)	2261	1 800 00											
American Lung Association Alvin Project	2266	5 000 00											
Shepherd Center Foundation (Atlanta OC)	2270	5 000 00											
UW Foundation (Zehms Scholarship Fund)	2271		3 000 00										
Options for Independent Living NASCAR Fund Raiser	2272		2 500 00										
Green Bay Literacy Council Scrabble Bee	2273		1 000 00										
Big Brothers Big Sisters	2274		10 000 00										
University of Iowa Dance Marathon	2275		200 00										
Cerebral Palsy Telethon	2276		5 000 00										
Green Bay Cellcom Marathon	2277		1 200 00										
National Railroad Museum Pullman Porter Exhibit	2278		11 865 00										
Green Bay Symphony Orchestra	2279		15 000 00										
The Volunteer Center of Brown County	2280		2 500 00										
WCCF Business World	2281		900 00										
Alzheimer's Association of Southeastern Wisconsin	2282		50 00										
Boys & Girls Club of Green Bay Wine & Cheese Event	2283		5 000 00										
Hope House Ministries	2284		500 00										
Sugar Getter for Skye Geier	2285		100 00										
DePere Youth Hockey	2286		250 00										
Green Bay Area Exchange Club	2287			1 000 00									
Appleton North Baseball	2289		200 00										
Start Smart of Brown County	2290			500 00									
Cornerstone Community Center Zamboni	2291		15 000 00										
YMCA Strong Kids	2292		7 500 00										
Meyer Theatre	2293		20 000 00										
Habitat for Humanity Volunteer Appreciation Dinner	2294			250 00									
Einstein Project	2295		9 023 00										
Big Brothers Big Sisters of Richland County (Wal-Mart OC - Olney IL)	2296		250 00										
Breast Cancer 3 Day Walk	2297		200 00										
St Norbert College Outdoor Athletic Complex	2298		20 000 00										
Women's Fund of Greater Green Bay	2299			1 000 00									
March of Dimes	2300		1 000 00										
Alzheimer's Association Memory Walk	2301		300 00										
Hats Off to Women Benefit	2302		500 00										
MDA Packerland Ride	2303		5 000 00										
American Cancer Society (Dallas OC)	2304			2 000 00									
Juvenile Diabetes Research Foundation	2305		1 000 00										
Henry County Veterans Museum (Atlanta OC)	2306			500 00									
Green Bay Area Destination Imagination	2307			1 000 00									
American Red Cross Dancing with Our Stars	2308		500 00										
Junior Achievement Business Hall of Fame Dinner	2309		3 000 00										
Children's Miracle Network (Walmart OC London KY)	2310			500 00									
UW Alumni Club of Brown County	2311			2 500 00									
Notre Dame Truonfest 2009	2312				500 00								
DePere Baseball Booster Club	2313			200 00									
Pulaski Community High School	2314			200 00									
Marian University	2315			600 00									
Ashwaubenon Jaguars Backers	2316			200 00									
Partners in Education Drug Alliance	2317			2 000 00									
Knights of Columbus-Meghan's Miracle (Farmington Hills OC)	2318			1 000 00									
UW Oshkosh MBA Program Facility	2319			35 000 00									
Junior Achievement Business Hall of Fame Dinner add'l funds	2320			500 00									
Colton Pony Baseball League (Fontana OC)	2321					250 00							
Aspiro	2322				4 000 00								
Service League of Green Bay	2323				1 000 00								
Art Spectacular	2324				1 000 00								
Celebrate DePere	2325				500 00								
Emmanuel Unique Outreach Center (Fontana OC)	2326					1 000 00							
Alzheimer's Association	2327				50 00								
Ashwaubenon's Lions Club	2328				1 000 00								
United Way of Brown County	2329				3 750 00								
NWTC Foundation	2330				4 000 00								
Management Women, Inc	2331				2 500 00								
Martin Marathon of Knowledge	2332				100 00								
Breast Cancer 3-Day (Farmington Hills OC)	2333				500 00								
The Volunteer Center of Brown County	2334				80 00								
Marj Jo Tetter Benefit Fund (APS OC)	2335				500 00								
Preble High School DECA	2336				100 00								
Girl Scouts	2337				250 00								
St. Matthew Band Trp	2338				100 00								
Green Bay East Baseball Scholarship Fund	2339						100 00						
Tank Elementary School	2340					100 00							
Lucille Schless Benefit	2341					250 00							
The Friends of the WI Singers	2342					100 00							
March of Dimes (Farmington Hills OC)	2343					1 000 00							
Southwest DECA	2344					150 00							
Arthritis Foundation (Harrisburg OC)	2345					200 00							
Runnin' For the Raskus	2346					50 00							
Meyer Theatre	2347					800 00							
Bay Port High School	2348					150 00							
Children's Miracle Network (Walmart OC - Wintersville OH)	2349					340 00							
Green Bay Civic Symphony	2350					5 000 00							
Wadsworth Fire & EMS dept (Seville OC)	2351								50 00				
Lupus Foundation of America (Charlotte OC)	2352					1 000 00							
Susan G Komen Breast Cancer Foundation (Charlotte OC)	2353					1 000 00							

SCHNEIDER NATIONAL FOUNDATION, INC
2009 LISTING OF CONTRIBUTIONS PAID

Recipient	Check #	January	February	March	April	May	June	July	August	September	October	November	December
Episcopal Relief & Development (in memory of Shirley Annis)	2354					115 00							
Boys & Girls Club Chairman's Dinner	2355						2 500 00						
Green Bay West High School Purple Parrot	2356					100 00							
Boy Scouts	2357					1 000 00							
Encompass Early Education & Care	2358						100 00						
NWTC Foundation	2359						1,000 00						
American Cancer Society	2360							1 000 00					
Aspiro	2361						998 00						
The Bellin Foundation	2362						15 000 00						
Boy Scouts	2363						1 000 00						
Epilepsy Foundation	2364							100 00					
The Marquette Fund	2365						100 00						
Cerebral Palsy Inc - CP Walk	2366						500 00						
United Way of Brown County	2368						2 000 00						
Fairburn Police Dept (Atlanta OC)	2369						500 00						
Valley View Elementary School	2370									100 00			
Farmington Family YMCA (Farmington Hills OC)	2371								500 00				
Children's Miracle Network (Walmart OC - Bedford, PA)	2372							500 00					
Hospice of the Valley	2373							50 00					
St. Jude Children's Hospital (Farmington Hills OC)	2374								500 00				
Bedford County Fair (Walmart OC - Bedford, PA)	2375							1 100 00					
Falcon Athletics	2376							200 00					
NEW Curative Rehab Alzheimer Daycare Courtyard	2377							15 000 00					
UVA Children's Hospital (Walmart OC - Gordonsville, VA)	2378							300 00					
Truckin for Hospice (Sacramento OC)	2379								500 00				
The Motor City Lyric Opera (Farmington Hills OC)	2380								500 00				
Chosen Vision (Farmington Hills OC)	2381								500 00				
My Brother's Keeper	2382							10 000 00					
American Foundation of Counseling Services (Ethics in Business)	2383							5 000 00					
JDRF (Farmington Hills OC)	2384								500 00				
Terrilyn Rasku Memorial Fund	2385								100 00				
Ohio State University	2386									500 00			
United Cerebral Palsy of Greater Houston (Houston OC)	2387										500 00		
Shepherd Center Foundation (Atlanta OC)	2388										1 000 00		
The Audubon Society (Farmington Hills OC)	2389												2 000 00
NWTC Educational Foundation	2390									5 000 00			
Special Olympics World's Largest Truck Convoy	2391									1 000 00			
Family Services Green & Gold Gala	2392									6 000 00			
Encompass Oktoberfest	2393									400 00			
Children's Miracle Network (Walmart OC - Gordonsville, VA)	2395									400 00			
Green Bay East High School Red Devils Athletics	2396											80 00	
New Community Shelter	2397									1 500 00			
NEW Zoo	2398										500 00		
South Oakland Shelter (Farmington Hills OC)	2399										500 00		
Children's Miracle Network (Walmart OC - Gordonsville, VA)	2400										50 00		
Freedom House	2401									1 000 00			
Susan G. Komen For the Cure (Walmart OC)	2402										420 00		
Children's Miracle Network (Walmart OC - London, KY)	2403										500 00		
St. Colette of Wisconsin	2404											100 00	
Green Bay Area Chamber of Commerce	2405										500 00		
Boy Scouts of America (W. Memphis OC)	2406										2 000 00		
Foundation for Lutheran Child & Family Services (Indy OC)	2407												1 000 00
The Sharing Place (Indy OC)	2408												1 000 00
Old Bethel Food Pantry (Indy OC)	2409												500 00
United Way of Indianapolis (Indy OC)	2410												1 000 00
St. Martin of Tours Church	2411											100 00	
United Way (Charlotte OC)	2412												1 800 00
IndUS of Fox Valley	2414												1 700 00
Makarov Youth Ballet	2415											200 00	
Leukemia & Lymphoma Society (Harrisburg OC)	2416											1 000 00	
Cerebral Palsy Inc - CP Auction	2417											500 00	
Ashwaubenon Basketball Association	2418											500 00	
Western DuPage Special Recreation Association Foundation	2419											2 500 00	
Akron Canton Regional Food Bank (Seville OC)	2420											5 250 00	
YMCA	2421											2 500 00	
Susan G. Komen Breast Cancer Foundation (Charlotte OC)	2423												1 500 00
Cerebral Palsy Inc	2424											2 500 00	
United Way Columbia Willamette (Sacramento OC)	2425												650 00
Edgewood Seminoles	2426												200 00
Unity Hospice Capital Campaign	2427												10 000 00
Waterford Youth Assistance (Farmington Hills OC)	2428												500 00
Ronald McDonald House (APS OC)	2429												3 500 00
House of Ruth (APS OC)	2430												1 700 00
Inland Empire Foster Parent Association (APS OC)	2431												1 300 00
Haven (Farmington Hills OC)	2433												500 00
Shepherd Center Foundation (Reno OC)	2436												1 800 00
UW Foundation	2438												10 000 00
Paul's Pantry	2439												7 500 00
New Community Shelter	2440												7 500 00
Boys & Girls Club of Green Bay Christmas Card Contest	2442												1 989 99
Images of Hope (Gary, OC)	2444												2 300 00
For Women Only (Gary, OC)	2445												1 500 00
YMCA Capital Campaign	2440												10 000 00
Syble Hopp Capital Campaign	2451												30 000 00
Habitat for Humanity General Sponsorship	2453												20 000 00
Options for Independent Living Capital Campaign	2454												10 000 00
United Way of Brown County	2455												52 500 00
		\$ 19 250 00	\$ 148 188 00	\$ 50 450 00	\$ 19 930 00	\$ 12 605 00	\$ 23 798 00	\$ 33 250 00	\$ 3 150 00	\$ 15 900 00	\$ 5 970 00	\$ 15 230 00	\$ 183 939 99

Total Donations 531,660 99