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Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

2009

Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning , 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 RICHARD J. RESCH FOUNDATION, LTD		A Employer identification number 39-1653788
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite P. O. BOX 8100		B Telephone number 920-468-2572
	City or town, state, and ZIP code GREEN BAY, WI 54308		C If exemption application is pending, check here ☐
			D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,114,005.		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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))		(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	0.		N/A	
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	3,906.	3,906.		STATEMENT 1
	4 Dividends and interest from securities	19,461.	19,461.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	15,219.			
	b Gross sales price for all assets on line 6a	91,630.			
	7 Capital gain net income (from Part IV, line 2)		15,219.		
	8 Net short-term capital gain				
Operating and Administrative Expenses	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit (or loss)				
	11 Other income				
	12 Total. Add lines 1 through 11	38,586.	38,586.		
	13 Compensation of officers, directors, trustees, etc.	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees	STMT 3	504.	0.	0.
	c Other professional fees				
	17 Interest				
	18 Taxes	STMT 4	877.	0.	0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
22 Printing and publications					
23 Other expenses	STMT 5	5.	0.	0.	
24 Total operating and administrative expenses. Add lines 13 through 23		1,386.	0.	0.	
25 Contributions, gifts, grants paid		21,053.		21,053.	
26 Total expenses and disbursements. Add lines 24 and 25		22,439.	0.	21,053.	
27 Subtract line 26 from line 12		16,147.			
a Excess of revenue over expenses and disbursements			38,586.		
b Net investment income (if negative, enter -0-)					
c Adjusted net income (if negative, enter -0-)			N/A		

4

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

Beginning of year

End of year

(a) Book Value

(b) Book Value

(c) Fair Market Value

Assets

1	Cash - non-interest-bearing			
2	Savings and temporary cash investments	390,886.	480,542.	480,542.
3	Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
4	Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons			
7	Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10a	Investments - U S and state government obligations			
b	Investments - corporate stock STMT 7	627,477.	553,595.	631,463.
c	Investments - corporate bonds			
11	Investments - land, buildings, and equipment: basis ▶ 2,000.			
	Less: accumulated depreciation ▶	2,000.	2,000.	2,000.
12	Investments - mortgage loans			
13	Investments - other			
14	Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation ▶			
15	Other assets (describe ▶)			
16	Total assets (to be completed by all filers)	1,020,363.	1,036,137.	1,114,005.

Liabilities

17	Accounts payable and accrued expenses			
18	Grants payable			
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable			
22	Other liabilities (describe ▶)			
23	Total liabilities (add lines 17 through 22)	0.	0.	

Net Assets or Fund Balances

	Foundations that follow SFAS 117, check here ▶ ☐			
	and complete lines 24 through 26 and lines 30 and 31.			
24	Unrestricted			
25	Temporarily restricted			
26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	and complete lines 27 through 31.			
27	Capital stock, trust principal, or current funds	0.	0.	
28	Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
29	Retained earnings, accumulated income, endowment, or other funds	1,020,363.	1,036,137.	
30	Total net assets or fund balances	1,020,363.	1,036,137.	
31	Total liabilities and net assets/fund balances	1,020,363.	1,036,137.	

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	1,020,363.
2	Enter amount from Part I, line 27a	2	16,147.
3	Other increases not included in line 2 (itemize) ▶ VOID CK 1337 - 2007 CONTRIBUTION	3	100.
4	Add lines 1, 2, and 3	4	1,036,610.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 6	5	473.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,036,137.

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 SEE ATTACHED STATEMENT			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 91,630.		76,411.	15,219.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			15,219.

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	15,219.
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 }	3	N/A

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 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	52,292.	1,164,690.	.044898
2007	224,772.	1,373,199.	.163685
2006	51,409.	913,877.	.056254
2005	61,763.	908,433.	.067989
2004	52,801.	918,712.	.057473

2 Total of line 1, column (d)	2	.390299
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.078060
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,011,283.
5 Multiply line 4 by line 3	5	78,941.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	386.
7 Add lines 5 and 6	7	79,327.
8 Enter qualifying distributions from Part XII, line 4	8	21,053.

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.

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	772.
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	772.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	772.
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	680.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	1,092.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d	7	1,772.	
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	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,000.	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see 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
1c 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 ☐ \$ 0. (2) On foundation managers ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ 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(i)(3) or 4942(i)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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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 instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► NONE	13	X	
14	The books are in care of ► GERALD C. CONDON, JR. Telephone no ► 920-432-6466 Located at ► 200 S. WASHINGTON ST., # 301, GREEN BAY, WI ZIP+4 ► 54301			
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/A

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

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

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

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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)?

☐ 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 instructions)?

N/A

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 expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

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

6b

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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

(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
RICHARD J. RESCH 1339 N SUMMER RANGE RD, DE PERE, WI 54115	PRES/TREAS 0.00	0.	0.	0.
SHARON J. RESCH 1339 N SUMMER RANGE RD DE PERE, WI 54115	VICE-PRESIDENT 0.00	0.	0.	0.
GERALD C. CONDON, JR 200 S. WASHINGTON ST., #301 GREEN BAY, WI 54301	SECRETARY 0.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

0

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**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) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services

0

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	
	0.
2	
3	
4	

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

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see 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	606,259.
b	Average of monthly cash balances	1b	420,424.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,026,683.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,026,683.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	15,400.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,011,283.
6	Minimum investment return. Enter 5% of line 5	6	50,564.

Part XI Distributable Amount (see 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	50,564.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	772.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	772.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	49,792.
4	Recoveries of amounts treated as qualifying distributions	4	100.
5	Add lines 3 and 4	5	49,892.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	49,892.

Part XII Qualifying Distributions (see 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	21,053.
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	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	21,053.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	21,053.

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.

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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				49,892.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005	16,815.			
c From 2006	6,331.			
d From 2007	157,068.			
e From 2008				
f Total of lines 3a through e	180,214.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$	21,053.			
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				21,053.
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))	28,839.			28,839.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	151,375.			
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				0.
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	151,375.			
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007	151,375.			
d Excess from 2008				
e Excess from 2009				

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	150 SH COVIDIEN PLC	P	07/06/07	09/01/09
b	150 SH TYCO ELECTRONICS LTD SWITZERLAND	P	07/06/07	09/01/09
c	150 SH TYCO INTL LTD	P	02/06/96	09/01/09
d	500 ALTRIA GROUP INC	P	02/02/98	09/01/09
e	2000 SH FORD MOTOR CO	P	04/17/91	09/01/09
f	1600 SH SCHERING PLOUGH CORP	P	02/06/96	09/01/09
g	400 SH WILLIAMS COS INC	P	02/02/98	09/01/09
h	30 SH ZIMMER HLDGS INC	P	12/06/99	09/01/09
i				
j				
k				
l				
m				
n				
o				

(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 5,934.		5,262.	672.
b 3,417.		4,845.	-1,428.
c 4,814.		6,467.	-1,653.
d 9,106.		4,939.	4,167.
e 15,440.		20,364.	-4,924.
f 44,914.		22,904.	22,010.
g 6,614.		10,592.	-3,978.
h 1,391.		1,038.	353.
i			
j			
k			
l			
m			
n			
o			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			672.
b			-1,428.
c			-1,653.
d			4,167.
e			-4,924.
f			22,010.
g			-3,978.
h			353.
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	15,219.
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 }	3	N/A

RICHARD J. RESCH FOUNDATION, LTD
CONTRIBUTIONS PAID - 2009
FORM 990-PF

RECIPIENT	ADDRESS	DATE	CHECK NO.	RELATIONSHIP	STATUS	PURPOSE	AMOUNT
AMERICAN HEART ASSOCIATION	7272 Greenville Ave., Dallas, TX 75231	01/09/09	1376	None	Public	General Fund	500.00
BAY AREA HUMANE SOCIETY	1830 Radisson Street Green Bay, WI 54302	01/20/09	1377	None	Public	General Fund	200.00
ALLOUEZ FIREFIGHTERS	135 Dauphin Street, Green Bay, WI 54301	02/10/09	1378	None	Public	General Fund	1500.00
FLORIDA OCEANOGRAPHIC SOCIETY	890 NE Ocean Boulevard Stuart, FL 34996	02/10/09	1379	None	Public	General Fund	1000.00
BROWN COUNTY FOR COMMUNITY TREATMENT	CTR 305 E Walnut Street, Green Bay, WI 54305-3600	03/11/09	1380	None	Public	General Fund	500.00
MIT CLASS OF 1961	600 Memorial Drive, Third Floor Cambridge, MA 02139	03/11/09	1381	None	Public	General Fund	100.00
CANDLELIGHT VISION CORP	210 W. Winneconne Ave, Ste. B, Neenah, WI 54956	04/22/09	1382	None	Public	General Fund	500.00
BROWN COUNTY FOR COMMUNITY TREATMENT	CTR 305 E. Walnut Street, Green Bay, WI 54305-3600	04/22/09	1383	None	Public	General Fund	500.00
EIF REVOLON RUN/WALK FOR WOMEN	P.O. Box 582, Orange, CT 06477-1944	04/22/09	1384	None	Public	General Fund	50.00
MY BROTHER'S KEEPER	1039 W. Mason, Green Bay, WI 54303	05/14/09	1387	None	Public	General Fund	100.00
GREEN BAY RUGBY	Green Bay, WI	05/20/09	1388	None	Public	General Fund	750.00
ST. NORBERT COLLEGE	100 Grant Street De Pere, WI 54115	06/02/09	1389	None	Public	General Fund	1028.00
CELLCOM GREEN BAY MARATHON	320 North Adams St. Green Bay, WI 54301	07/07/09	1390	None	Public	General Fund	600.00
BAY AREA HUMANE SOCIETY	1830 Radisson Street Green Bay, WI 54302	08/10/09	1391	None	Public	General Fund	500.00
DUCKS UNLIMITED	One Waterfowl Way, Memphis, TN 38120	08/21/09	1392	None	Public	General Fund	25.00
HEALTH ED CONNECT	1401 W. Truman Road, Independence, MO 65050	09/22/09	1393	None	Public	General Fund	100.00
MIT LAMBDA ZETA ASSOCIATION, INC	600 Memorial Drive, Third Floor Cambridge, MA 02139	10/09/09	1395	None	Public	General Fund	500.00
UNIVERSITY OF WI - GREEN BAY, INT'L VOICE	2420 Nicolet Drive Green Bay, WI 54311	10/09/09	1396	None	Public	General Fund	5000.00
LAKESIDE COMMUNITY CHURCH	County Road K, Algoma, WI 54201	10/30/09	1397	None	Public	General Fund	500.00
COMMUNITY HEALTH CHARITIES OF WISCONSIN	1524 University Avenue, Green Bay, WI 54302	11/17/09	1398	None	Public	General Fund	1000.00
UNITED WAY OF BROWN COUNTY	P.O. Box 1593 Green Bay, WI 54302-1593	11/17/09	1399	None	Public	General Fund	1000.00
DE PERE DOG PARK ASSOCIATION	925 S. Sixth Street, De Pere, WI 54115	12/15/09	1400	None	Public	General Fund	1000.00
GILFORD ANIMAL SHELTER	54525 West Wendover Ave., Greensboro, NC 27409	12/23/09	1401	None	Public	General Fund	100.00
FIRST UNITED METHODIST CHURCH	501 Howe Green Bay, WI 54301	12/23/09	1402	None	Public	General Fund	1,000.00
NEW COMMUNITY SHELTER	301 Mather Street, Green Bay, WI 54303	12/23/09	1403	None	Public	General Fund	1,000.00
BAY AREA HUMANE SOCIETY	1830 Radisson Street Green Bay, WI 54302	12/23/09	1404	None	Public	General Fund	1,000.00
HARVARD BUSINESS SCHOOL	124 Mount Auburn Street Cambridge, MA 02138	12/23/09	1406	None	Public	General Fund	1,000.00

21,053.00

Schedule 1

RICHARD J. RESCH FOUNDATION, LTD.
BALANCE SHEET
DECEMBER 31, 2009

ASSETS	DATE PURCHASED	COST	CURRENT MO FMV	FMV PRIOR MO	CHANGE	UNREALIZED GAIN/(LOSS)
CASH						
Associated Investments Dreyfus Cash Mgmt		175,072.03	175,072.03	173,621.72	1,450.31	
Associated Bank Money Market		302,167.32	302,167.32	302,013.42	153.90	
Associated Bank Checking		3,302.86	3,302.86	8,402.86	(5,100.00)	
Total Cash		480,542.21	480,542.21	484,038.00	(3,495.79)	
ASSOCIATED INVESTMENTS						
100 Enstar Group Limited Ord Shs	01/25/07	9,655.00	7,330.00	7,357.00	(27.00)	(2,325.00)
100 Enstar Group Limited Ord Shs	01/30/07	10,173.00	7,330.00	7,357.00	(27.00)	(2,843.00)
200 Arch Coal Inc. Com	02/07/07	6,259.00	4,450.00	4,172.00	278.00	(1,809.00)
1132 Associated Bank Corp Com	02/02/98	26,387.81	12,463.32	12,836.88	(373.56)	(13,924.49)
1000 Associated Banc Corp Com	07/28/08	18,877.00	11,010.00	11,340.00	(330.00)	(7,867.00)
10 Berkshire Hathaway Hldg Co CL B Com	12/07/05	29,889.00	32,860.00	33,530.00	(670.00)	2,971.00
5 Berkshire Hathaway Hldg Co CL B Com	07/28/08	19,779.45	16,430.00	16,765.00	(335.00)	(3,349.45)
300 Bristol-Myers Squibb	12/06/99	20,478.48	7,575.00	7,593.00	(18.00)	(12,903.48)
768 Citigroup, Inc	04/17/91	10,038.28	2,542.08	3,156.48	(614.40)	(7,496.20)
200 Coca-Cola Company	02/02/98	13,153.10	11,400.00	11,440.00	(40.00)	(1,753.10)
500 Crown Hldgs Inc Com	03/05/02	3,651.05	12,790.00	12,585.00	205.00	9,138.95
200 Duke Energy Corp New Com	01/31/07	3,924.00	3,442.00	3,336.00	106.00	(482.00)
1087 EMC Corp (MASS) Com(formerly Documentum)	01/29/99	6,191.88	18,989.89	18,294.21	695.68	12,798.01
400 General Electric Co	03/07/01	18,460.57	6,052.00	6,408.00	(356.00)	(12,408.57)
2400 Intel Corp (7/17/97 & 4/15/99 split)	02/06/96	18,075.00	48,960.00	46,080.00	2,880.00	30,885.00
346 Kraft Foods, Inc CIA	04/02/07	5,068.64	9,404.28	9,196.68	207.60	4,335.64
60 Patnot Coal Corp Com (Spin off from Peabody)	02/07/07	805.33	927.60	735.00	192.60	122.27
300 Peabody Energy Corp Com	02/07/07	11,714.67	13,563.00	13,338.00	225.00	1,848.33
500 Philip Morris Intl Inc (Altra Split)	02/02/98	11,253.73	24,095.00	24,045.00	50.00	12,841.27
1000 Procter & Gamble Co	02/02/98	39,474.08	60,630.00	62,350.00	(1,720.00)	21,155.92
332 Reynolds American Inc (RJ Reynold Tob Holdings Inc (6/99 sp	02/02/98	5,537.72	17,586.04	16,586.72	999.32	12,048.32
200 Spectra Energy Corp Com	01/31/07	5,185.00	4,102.00	3,882.00	220.00	(1,083.00)
800 ASBC Cap Tr 1 7 625% Callable	05/23/02	20,000.00	15,856.00	15,288.00	568.00	(4,144.00)
500 Plum Creek Timber Co	03/06/02	15,629.89	18,880.00	17,245.00	1,635.00	3,250.11
10701 Alliancebrstein Income Fd Inc Com	1990/1993	78,287.82	88,283.25	89,224.94	(941.69)	9,995.43
3,092 105 FMI Large Cap Fund	01/08/07	47,039.00	43,722.36	43,258.55	463.81	(3,316.64)
176.954 Reinvested Dividends	Various	2,555.22	2,502.13	2,475.59	26.54	(53.09)
492 692 Vanguard Index Trust Fd 500	02/07/96	30,075.02	50,584.69	49,934.34	650.35	20,509.67
142 446 Reinvested Dividends	Various	14,691.14	14,624.93	14,030.79	594.14	(66.21)
1005 051 Vanguard Extended Fund	02/07/96	24,950.00	32,835.02	30,865.12	1,969.90	7,885.02
925 695 Reinvested Dividends	Various	26,334.93	30,242.45	27,858.48	2,383.97	3,907.52
Total Securities @ Associated Investments		553,594.81	631,463.04	622,564.78	8,898.26	77,868.23
TOTAL ASSETS		1,034,137.02	1,112,005.25	1,106,602.78	5,402.47	77,868.23

Schedule 2

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
ASBC CAP TR 6.25% ORIGINATED SECS QTR	1,525.
ASSOC INV - DREYFUS CASH MGMT INVEST	214.
ASSOCIATED BANK - MONEY MARKET	2,167.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	3,906.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
ALLANCEBERSTEIN INCOME FD	6,688.	0.	6,688.
ASSOCIATED BROKERAGE	12,773.	0.	12,773.
TOTAL TO FM 990-PF, PART I, LN 4	19,461.	0.	19,461.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
GERALD C. CONDON & ASSOCIATES	504.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	504.	0.		0.

FORM 990-PF TAXES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
2008 EXCISE TAX	197.	0.		0.
2009 EST. EXCISE TAX PAYMENT	680.	0.		0.
TO FORM 990-PF, PG 1, LN 18	877.	0.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
REGISTRATION FEE - COVIDIEN MERGER	5.	0.		0.
TO FORM 990-PF, PG 1, LN 23	5.	0.		0.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	6
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DESCRIPTION	AMOUNT
NON DEDUCTIBLE PORTION OF CONTRIBUTION	473.
TOTAL TO FORM 990-PF, PART III, LINE 5	473.

FORM 990-PF	CORPORATE STOCK	STATEMENT	7
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCKS SCHEDULE 2	553,595.	631,463.
TOTAL TO FORM 990-PF, PART II, LINE 10B	553,595.	631,463.

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

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

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

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

Type or print File by the extended due date for filing the return. See instructions.	Name of Exempt Organization	Employer identification number
	RICHARD J. RESCH FOUNDATION, LTD	39-1653788
	Number, street, and room or suite no. If a P.O. box, see instructions. P. O. BOX 8100	For IRS use only
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. GREEN BAY, WI 54308	

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

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

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

GERALD C. CONDON, JR.

- The books are in the care of ☒ 200 S. WASHINGTON ST., # 301 - GREEN BAY, WI 54301

Telephone No. ☒ 920-432-6466

FAX No. ☐

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

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

4 I request an additional 3-month extension of time until MAY 15, 2010.

5 For calendar year 2009, or other tax year beginning , and ending .

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

7 State in detail why you need the extension

TAXPAYER DOES NOT HAVE SUFFICIENT INFORMATION FROM INVESTMENT MANAGERS TO PREPARE A COMPLETE AND ACCURATE RETURN.

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	1,772.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	1,772.
c Balance Due. Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	8c	\$	0.

Signature and Verification

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

Signature *Gerald C. Condon, Jr.* Title SECRETARY

Date 8/13/10

Form 8868 (Rev 4-2009)

MAILED
8/13/10 (mk)