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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

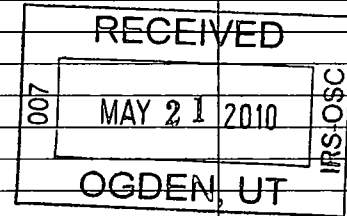
Note The foundation may be able to use a copy of this return to satisfy state reporting requirements.

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 RATH FOUNDATION, INC. | | A Employer identification number 39-1657654 |
| | Number and street (or P.O. box number if mail is not delivered to street address) P.O. BOX 1990 | | B Telephone number (608) 754-9090 |
| | City or town, state, and ZIP code JANESVILLE, WI 53547 | | C If exemption application is pending check here <input type="checkbox"/> |
| | H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation | | D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> |
| I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 29,056,171. (Part I, column (d) must be on cash basis) | | 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)) | | (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 | | | N/A | | |
| | 2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B | | | | | |
| | 3 Interest on savings and temporary cash investments | 37,310. | 37,310. | | STATEMENT 1 | |
| | 4 Dividends and interest from securities | 754,668. | 754,668. | | STATEMENT 2 | |
| | 5a Gross rents | | | | | |
| | b Net rental income or (loss) | | | | | |
| | 6a Net gain or (loss) from sale of assets not on line 10 | -1,075,106. | | | | |
| | b Gross sales price for all assets on line 6a | 4,356,755. | | | | |
| | 7 Capital gain net income (from Part IV, line 2) | | 0. | | | |
| | 8 Net short-term capital gain | | | | | |
| | 9 Income modifications | | | | | |
| | 10a Gross sales less returns and allowances | | | | | |
| b Less Cost of goods sold | | | | | | |
| c Gross profit or (loss) | | | | | | |
| 11 Other income | 3,100. | 17,112. | | STATEMENT 3 | | |
| 12 Total Add lines 1 through 11 | -280,028. | 809,090. | | | | |
| Operating and Administrative Expenses | 13 Compensation of officers, directors, trustees, etc | 45,000. | 33,750. | | 11,250. | |
| | 14 Other employee salaries and wages | | | | | |
| | 15 Pension plans, employee benefits | | | | | |
| | 16a Legal fees | | | | | |
| | b Accounting fees | STMT 4 | 16,091. | 12,068. | | 4,023. |
| | c Other professional fees | STMT 5 | 140,000. | 130,000. | | 10,000. |
| | 17 Interest | | | | | |
| | 18 Taxes | STMT 6 | 10,581. | 9,792. | | 861. |
| | 19 Depreciation and depletion | | 30. | 23. | | |
| | 20 Occupancy | | 24,704. | 18,528. | | 6,176. |
| | 21 Travel, conferences, and meetings | | | | | |
| | 22 Printing and publications | | | | | |
| | 23 Other expenses | STMT 7 | 830. | 623. | | 207. |
| | 24 Total operating and administrative expenses Add lines 13 through 23 | | 237,236. | 204,784. | | 32,517. |
| | 25 Contributions, gifts, grants paid | | 3,395,029. | | | 4,457,636. |
| 26 Total expenses and disbursements Add lines 24 and 25 | | 3,632,265. | 204,784. | | 4,490,153. | |
| 27 Subtract line 26 from line 12: | | | | | | |
| a Excess of revenue over expenses and disbursements | | -3,912,293. | | | | |
| b Net investment income (if negative, enter -0-) | | | 604,306. | | | |
| c Adjusted net income (if negative, enter -0-) | | | | N/A | | |



SCANNED MAY 25 2010

| 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 | 700,423. | 12,800. | 12,800. |
| | 2 Savings and temporary cash investments | 862,846. | 321,528. | 321,528. |
| | 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 | 8,900. | 8,900. | 8,900. |
| | 10a Investments - U.S. and state government obligations | | | |
| | b Investments - corporate stock | | | |
| | c Investments - corporate bonds | | | |
| Liabilities | 11 Investments - land, buildings, and equipment basis ▶ | | | |
| | Less: accumulated depreciation ▶ | | | |
| | 12 Investments - mortgage loans | | | |
| | 13 Investments - other STMT 9 | 24,509,574. | 28,620,240. | 28,620,240. |
| | 14 Land, buildings, and equipment: basis ▶ 140,987. | | | |
| | Less: accumulated depreciation ▶ 88,460. | 52,557. | 52,527. | 52,527. |
| | 15 Other assets (describe ▶ STATEMENT 10) | 64,945. | 40,176. | 40,176. |
| | 16 Total assets (to be completed by all filers) | 26,199,245. | 29,056,171. | 29,056,171. |
| | 17 Accounts payable and accrued expenses | | | |
| | 18 Grants payable | 3,804,403. | 2,741,796. | |
| Net Assets or Fund Balances | 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) | 3,804,403. | 2,741,796. | |
| Net Assets or Fund Balances | Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input checked="" type="checkbox"/> | | | |
| | 24 Unrestricted | 22,394,842. | 26,314,375. | |
| | 25 Temporarily restricted | | | |
| | 26 Permanently restricted | | | |
| | Foundations that do not follow SFAS 117, check here and complete lines 27 through 31 <input type="checkbox"/> | | | |
| | 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 | 22,394,842. | 26,314,375. | | |
| 31 Total liabilities and net assets/fund balances | 26,199,245. | 29,056,171. | | |

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 | 22,394,842. |
| 2 Enter amount from Part I, line 27a | 2 | -3,912,293. |
| 3 Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 8 | 3 | 7,831,826. |
| 4 Add lines 1, 2, and 3 | 4 | 26,314,375. |
| 5 Decreases not included in line 2 (itemize) ▶ | 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 | 26,314,375. |

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 RBC - SEE ATTACHED | | | |
| b OTHER - SEE ATTACHED | P | | |
| c CAPITAL GAINS FROM PASS-THROUGH | | | |
| 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 4,329,693. | | 5,434,482. | -1,104,789. |
| b 27,062. | | | 27,062. |
| c | | | 2,621. |
| d | | | |
| e | | | |

| 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 | | | -1,104,789. |
| b | | | 27,062. |
| c | | | 2,621. |
| d | | | |
| e | | | |

| | | | |
|---|---|---|-------------|
| 2 Capital gain net income or (net capital loss) | { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 | 2 | -1,075,106. |
| 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 | 4,025,407. | 35,523,873. | .113316 |
| 2007 | 4,263,459. | 46,856,312. | .090990 |
| 2006 | 4,120,131. | 47,090,773. | .087493 |
| 2005 | 4,904,469. | 47,387,634. | .103497 |
| 2004 | 3,633,889. | 48,100,147. | .075548 |

| | | |
|---|---|-------------|
| 2 Total of line 1, column (d) | 2 | .470844 |
| 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 | .094169 |
| 4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 | 4 | 27,170,179. |
| 5 Multiply line 4 by line 3 | 5 | 2,558,589. |
| 6 Enter 1% of net investment income (1% of Part I, line 27b) | 6 | 6,043. |
| 7 Add lines 5 and 6 | 7 | 2,564,632. |
| 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. | 8 | 4,490,153. |

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 <input type="checkbox"/> and enter "N/A" on line 1. | | | |
| Date of ruling or determination letter. _____ (attach copy of letter if necessary-see instructions) | | | |
| b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b | | 1 | 6,043. |
| c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b) | | 2 | 0. |
| 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | | 3 | 6,043. |
| 3 Add lines 1 and 2 | | 4 | 0. |
| 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) | | 5 | 6,043. |
| 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- | | | |
| 6 Credits/Payments: | | | |
| a 2009 estimated tax payments and 2008 overpayment credited to 2009 | 6a | 7,198. | |
| b Exempt foreign organizations - tax withheld at source | 6b | | |
| c Tax paid with application for extension of time to file (Form 8868) | 6c | | |
| d Backup withholding erroneously withheld | 6d | | |
| 7 Total credits and payments. Add lines 6a through 6d | | 7 | 7,198. |
| 8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached | | 8 | |
| 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | | 9 | |
| 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | | 10 | 1,155. |
| 11 Enter the amount of line 10 to be Credited to 2010 estimated tax <input checked="" type="checkbox"/> 1,155. Refunded <input checked="" type="checkbox"/> | | 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. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers <input checked="" type="checkbox"/> \$ 0. | | |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 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) <input checked="" 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)? 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 |

N/A

Form 990-PF (2009)

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 ► <u>N/A</u> | 13 | X | |
| 14 | The books are in care of ► <u>JAMES DODSON</u> Telephone no. ► <u>608-754-9090</u> Located at ► <u>P.O. BOX 1990, JANESVILLE, WI</u> ZIP+4 ► <u>53547</u> | | | |
| 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? | <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 | 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? | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? | <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) | 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 |

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:

(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

X

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 |
|----------------------|---|---|---|---------------------------------------|
| JAMES D. DODSON | PRESIDENT | | | |
| 3140 BOX CANYON RD | | | | |
| SANTA YNEZ, CA 93460 | 1.00 | 20,000. | 0. | 0. |
| JAMES R. SANGER | VICE PRES. | | | |
| P.O. BOX 1990 | | | | |
| JANESVILLE, WI 53547 | 15.00 | 45,000. | 0. | 0. |
| KATE M. FLEMING | SECRETARY | | | |
| 100 E. WISCONSIN AVE | | | | |
| MILWAUKEE, WI 53202 | 1.00 | 20,000. | 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

Form 990-PF (2009)

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 | 26,086,683. |
| b | Average of monthly cash balances | 1b | 948,796. |
| c | Fair market value of all other assets | 1c | 548,459. |
| d | Total (add lines 1a, b, and c) | 1d | 27,583,938. |
| 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 | 27,583,938. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 413,759. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 27,170,179. |
| 6 | Minimum investment return. Enter 5% of line 5 | 6 | 1,358,509. |

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 | 1,358,509. |
| 2a | Tax on investment income for 2009 from Part VI, line 5 | 2a | 6,043. |
| b | Income tax for 2009. (This does not include the tax from Part VI.) | 2b | |
| c | Add lines 2a and 2b | 2c | 6,043. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 1,352,466. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 1,352,466. |
| 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 | 1,352,466. |

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 | 4,490,153. |
| 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 | 4,490,153. |
| 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 | 6,043. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 4,484,110. |

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.

Form 990-PF (2009)

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 | | | | 1,352,466. |
| 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 | 1,386,092. | | | |
| b From 2005 | 2,562,363. | | | |
| c From 2006 | 1,833,985. | | | |
| d From 2007 | 1,972,231. | | | |
| e From 2008 | 2,264,139. | | | |
| f Total of lines 3a through e | 10,018,810. | | | |
| 4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 4,490,153. | | | | |
| 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 | | | | 1,352,466. |
| e Remaining amount distributed out of corpus | 3,137,687. | | | |
| 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 | 13,156,497. | | | |
| 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 | 1,386,092. | | | |
| 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a | 11,770,405. | | | |
| 10 Analysis of line 9: | | | | |
| a Excess from 2005 | 2,562,363. | | | |
| b Excess from 2006 | 1,833,985. | | | |
| c Excess from 2007 | 1,972,231. | | | |
| d Excess from 2008 | 2,264,139. | | | |
| e Excess from 2009 | 3,137,687. | | | |

N/A

foundation, and the ruling is effective for 2009, enter the date of the ruling

☐ 4942(i)(3) or ☐ 4942(i)(5)

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(i)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

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 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:

JAMES DODSON, P.O. BOX 1990, JANESVILLE, WI 53547, 608-754-9090

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

WRITTEN APPLICATION TO ABOVE ADDRESS. NO FORMAL APPLICATION AT THIS TIME.

c Any submission deadlines:

NONE

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

THE ORGANIZATION IS ORGANIZED AND SHALL OPERATE EXCLUSIVELY FOR CHARITABLE, SCIENTIFIC, LITERARY, AND/OR EDUCATIONAL PURPOSES.

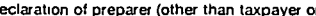
Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

| | | | |
|---|--------------|------------|-----------|
| <p>1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?</p> <p>a Transfers from the reporting foundation to a noncharitable exempt organization of:</p> <p>(1) Cash</p> <p>(2) Other assets</p> <p>b Other transactions:</p> <p>(1) Sales of assets to a noncharitable exempt organization</p> <p>(2) Purchases of assets from a noncharitable exempt organization</p> <p>(3) Rental of facilities, equipment, or other assets</p> <p>(4) Reimbursement arrangements</p> <p>(5) Loans or loan guarantees</p> <p>(6) Performance of services or membership or fundraising solicitations</p> <p>c Sharing of facilities, equipment, mailing lists, other assets, or paid employees</p> <p>d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received</p> | | Yes | No |
| | 1a(1) | | X |
| | 1a(2) | | X |
| | 1b(1) | | X |
| | 1b(2) | | X |
| | 1b(3) | | X |
| | 1b(4) | | X |
| | 1b(5) | | X |
| | 1b(6) | | X |
| | 1c | | X |

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

| b. If "Yes," complete the following schedule. | | |
|---|--------------------------|---------------------------------|
| (a) Name of organization | (b) Type of organization | (c) Description of relationship |
| N/A | | |
| | | |
| | | |
| | | |
| | | |

| | | | |
|---|--|--|--|
| Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge. | | | |
| Sign Here |  Signature of officer or trustee | | 5/14/10 Date |
| | | | V.P. Title |
| Paid Preparer's Use Only | Preparer's signature LYNN M. GARDINIER, CPA | | Date 05/14/10 |
| | Firm's name (or yours if self-employed), address, and ZIP code BAKER TILLY VIRCHOW KRAUSE, LLP 500 MIDLAND COURT, PO BOX 8130 JANESVILLE, WI 53547-8130 | | Check if self-employed <input checked="" type="checkbox"/> Preparer's identifying number EIN Phone no. (608) 752-5835 |

The Rath Foundation, Inc.
Gain (Loss) Summary - Tax
Tax Year 2009
FEIN: 39-1657654

| Description | Date Acqd | Date Sold | Sales Price | Cost | Gain (Loss) |
|--|--------------|--------------|---------------------|---------------------|-----------------------|
| <u>Dain Rauscher Account</u> | | | | | |
| 21,895 sh Imperial Credit Ind Inc | 12/9/1998 | 11/25/2009 | 0.22 | 0 30 | (0.08) |
| 50,000 sh Imperial Credit Ind. Inc. | 7/7/1999 | 11/25/2009 | 0.70 | 0 50 | 0 20 |
| 2,000 sh S&P's Depository Receipts | 3/13/2007 | 8/12/2009 | 201,313 90 | 277,206.00 | (75,892 10) |
| 6,000 sh S&P's Depository Receipts | 7/30/2007 | 8/12/2009 | 603,941 70 | 885,954.00 | (282,012 30) |
| 5,000 sh S&P's Depository Receipts | 11/7/2007 | 8/12/2009 | 503,284 75 | 750,223.50 | (246,938 75) |
| 4,000 sh S&P's Depository Receipts | 1/24/2008 | 12/10/2009 | 442,266.44 | 537,335.20 | (95,068.76) |
| 7,000 sh S&P's Depository Receipts | 1/29/2008 | 12/10/2009 | 773,966.27 | 953,756.00 | (179,789.73) |
| 10,000 sh S&P's Depository Receipts | 8/11/2008 | 10/12/2009 | 1,078,669.26 | 1,312,506 00 | (233,836 74) |
| 700,000 sh BF Saul Real Estate Inv't Tr | 10/30/2008 | 3/2/2009 | 726,250 00 | 717,500.00 | 8,750 00 |
| | | | <u>4,329,693 24</u> | <u>5,434,481.50</u> | <u>(1,104,788 26)</u> |
| <u>Other</u> | | | | | |
| Tyco settlement | Various | 3/31/2009 | 2,655.71 | 0.00 | 2,655.71 |
| Tenet Healthcare settlement | Various | 8/7/2009 | 6,270.56 | 0.00 | 6,270 56 |
| Invesco Litigation settlement | Various | 12/24/2009 | 18,135 47 | 0 00 | 18,135 47 |
| | | | <u>27,061 74</u> | <u>0.00</u> | <u>27,061 74</u> |
| <u>Capital Gains from Pass-Throughs</u> | | | | | |
| 4-G Investment Group K-1 (LT) | | | | | 2,708 00 |
| 4-G Investment Group K-1 (1231 Gain) | | | | | (87 00) |
| | | | | | <u>2,621 00</u> |
| TOTAL | | | | | <u>(1,075,105 52)</u> |

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

| SOURCE | AMOUNT |
|--|---------|
| INTEREST INCOME | 37,310. |
| TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A | 37,310. |

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

| SOURCE | GROSS AMOUNT | CAPITAL GAINS DIVIDENDS | COLUMN (A) AMOUNT |
|----------------------------------|--------------|----------------------------|----------------------|
| DIVIDEND INCOME | 754,668. | 0. | 754,668. |
| TOTAL TO FM 990-PF, PART I, LN 4 | 754,668. | 0. | 754,668. |

FORM 990-PF OTHER INCOME STATEMENT 3

| DESCRIPTION | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME |
|---------------------------------------|-----------------------------|-----------------------------------|-------------------------------|
| OTHER INCOME FROM PARTNERSHIPS | 3,100. | 17,112. | |
| TOTAL TO FORM 990-PF, PART I, LINE 11 | 3,100. | 17,112. | |

FORM 990-PF ACCOUNTING FEES STATEMENT 4

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| ACCOUNTING FEES | 16,091. | 12,068. | | 4,023. |
| TO FORM 990-PF, PG 1, LN 16B | 16,091. | 12,068. | | 4,023. |

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 5

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| BOARD OF DIRECTOR FEES | 40,000. | 30,000. | | 10,000. |
| CONSULTING FEES | 100,000. | 100,000. | | 0. |
| TO FORM 990-PF, PG 1, LN 16C | 140,000. | 130,000. | | 10,000. |

FORM 990-PF TAXES STATEMENT 6

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| PAYROLL TAXES | 3,443. | 2,582. | | 861. |
| FEDERAL EXCISE TAX | 7,138. | 7,210. | | 0. |
| TO FORM 990-PF, PG 1, LN 18 | 10,581. | 9,792. | | 861. |

FORM 990-PF OTHER EXPENSES STATEMENT 7

| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| MISCELLANEOUS | 90. | 68. | | 22. |
| FREIGHT/POSTAGE | 740. | 555. | | 185. |
| TO FORM 990-PF, PG 1, LN 23 | 830. | 623. | | 207. |

FORM 990-PF OTHER INCREASES IN NET ASSETS OR FUND BALANCES STATEMENT 8

| DESCRIPTION | AMOUNT |
|---|------------|
| INCREASE OF INVESTMENTS TO MARKET VALUE | 7,831,826. |
| TOTAL TO FORM 990-PF, PART III, LINE 3 | 7,831,826. |

FORM 990-PF

OTHER INVESTMENTS

STATEMENT 9

| DESCRIPTION | VALUATION METHOD | BOOK VALUE | FAIR MARKET VALUE |
|--|---------------------|-------------|----------------------|
| ANTIQUES | COST | 91,300. | 91,300. |
| INVESTMENT IN 4-G INVESTMENT GROUP | COST | | |
| PARTNERSHIP | | 251,132. | 251,132. |
| DAIN RAUSCHER FUNDS | FMV | 28,164,867. | 28,164,867. |
| WILC PARTNERSHIP | COST | 112,941. | 112,941. |
| TOTAL TO FORM 990-PF, PART II, LINE 13 | | 28,620,240. | 28,620,240. |

FORM 990-PF

OTHER ASSETS

STATEMENT 10

| DESCRIPTION | BEGINNING OF YR BOOK VALUE | END OF YEAR BOOK VALUE | FAIR MARKET VALUE |
|----------------------------------|-------------------------------|---------------------------|----------------------|
| ACCRUED INTEREST RECEIVABLE | 17,500. | 0. | 0. |
| PREPAID INCOME TAXES | 11,330. | 4,061. | 4,061. |
| INCOME TAX RECEIVABLE | 36,115. | 36,115. | 36,115. |
| TO FORM 990-PF, PART II, LINE 15 | 64,945. | 40,176. | 40,176. |

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 11

| RECIPIENT NAME AND ADDRESS | RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT | RECIPIENT STATUS | AMOUNT |
|---|--|---------------------|----------|
| BELOIT COLLEGE 700 COLLEGE ST BELOIT, WI 53511 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 100,000. |
| COMMUNITY FOUNDATION OF NORTH CENTRAL WISCONSIN 500 FIRST ST STE 2600 WAUSAU, WI 54403 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 5,000. |
| COMMUNITY FOUNDATION OF SOUTHERN WISCONSIN INC. 26 SOUTH JACKSON ST JANESVILLE, WI 53548 | N/A RATH FAMILY MERIT SCHOLARSHIP FUND | PUBLIC CHARITY | 164,100. |
| LEUKEMIA AND LYMPHOMA SOCIETY 200 SOUTH EXECUTIVE DR #203 BROOKFIELD, WI 53005 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 2,500. |
| MEDICAL COLLEGE OF WISCONSIN 8701 WATERTOWN PLANK ROAD MILWAUKEE, WI 53226 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 304,106. |
| NATIVITY JESUIT MIDDLE SCHOOL 1515 SOUTH 29TH ST MILWAUKEE, WI 53215 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 5,000. |
| SOUTHWEST YMCA 11311 W HOWARD AVE GREENFIELD, WI 53228 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 5,000. |
| ST. FRANCIS CHILDREN'S CENTER 6700 NORTH PORT WASHINGTON RD GLENDALE, WI 53217 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 20,000. |

| UNITED WAY 205 N MAIN ST STE 101 JANESVILLE, WI 53546 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 5,000. |
|--|------------------------|-------------------|----------|
| UNIVERSITY OF OKLAHOMA FOUNDATION 100 TIMBERDELL RD NORMAN, OK 73019 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 568,198. |
| UNIVERSITY OF WISCONSIN FOUNDATION 1848 UNIVERSITY AVE MADISON, WI 53708 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 1578019. |
| USC MARSHALL SCHOOL OF BUSINESS USC CITIGROUP CENTER LOS ANGELES, CA 90089 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 121,585. |
| WI FOUNDATION FOR INDEPENDENT COLLEGES 4425 NORTH PORT WASHINGTON RD GLENDALE, WI 53212 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 558,352. |
| WOMEN'S LIFE LINE, INC 105 S 5TH ST NORFOLK, NE 68701 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 30,000. |
| WOMEN'S FUND OF GREATER MILWAUKEE 316 N MILWAUKEE ST STE 215 MILWAUKEE, WI 53202 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 5,000. |
| SYV COTTAGE HOSPITAL FOUNDATION 2050 VIBORG RD SOLVANG , CA 93463 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 50,000. |
| UNIVERSITY OF WISCONSIN CARBONE CANCER CENTER 600 HIGHLAND AVE MADISON, WI 53792 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 7,500. |
| WISCONSIN FACETS 2714 N DR MARTIN LUTHER KING DR MILWAUKEE, WI 53212 | N/A GENERAL PURPOSE | PUBLIC CHARITY | 5,000. |

RATH FOUNDATION, INC.

39-1657654

| | | | |
|--|-----------------|---------|--------|
| SPECIAL OLYMPICS WISCONSIN | N/A | PUBLIC | 5,000. |
| 5900 MONONA DR STE 301 MADISON, WI 53716 | GENERAL PURPOSE | CHARITY | |

| | | | |
|-------------------------------------|-----------------|---------|--------|
| POTOWATAMI AREA BOY SCOUTS | N/A | PUBLIC | 5,000. |
| 804 BLUEMOUND RD WAUKESHA, WI 53188 | GENERAL PURPOSE | CHARITY | |

| | | | |
|--|-----------------|---------|----------|
| UNIVERSITY OF CHICAGO FOUNDATION | N/A | PUBLIC | 913,276. |
| 5801 SOUTH ELLIS AVE CHICAGO, IL 60637 | GENERAL PURPOSE | CHARITY | |

TOTAL TO FORM 990-PF, PART XV, LINE 3A

4,457,636.