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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 , 2009, 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 <b>Gregory C. Van Wie Foundation, Inc.</b>		<b>A</b> Employer identification number <b>39-1822927</b>
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	<b>B</b> Telephone number (see the instructions) <b>(608) 257-5661</b>
	City or town	State ZIP code	<b>C</b> If exemption application is pending, check here <input type="checkbox"/>
	<b>Madison</b>	<b>WI 53703</b>	<b>D</b> 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
<b>H</b> 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		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> <b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
<b>I</b> Fair market value of all assets at end of year (from Part II, column (c), line 16) \$ <b>4,442,078.</b>		<b>J</b> 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)	

**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 the instructions).)

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>REVENUE</b>				
1 Contributions, gifts, grants, etc. received (att sch)				
2 Ck <input checked="" type="checkbox"/> if the foundn is not req to att Sch B				
3 Interest on savings and temporary cash investments	25,582.	25,582.	25,582.	
4 Dividends and interest from securities	77,532.	77,532.	77,532.	
5a Gross rents	258,423.	258,423.	258,423.	
b Net rental income or (loss) 137,084.				
6a Net gain/(loss) from sale of assets not on line 10				
b Gross sales price for all assets on line 6a				
7 Capital gain net income (from Part IV, line 2)		27,961.		
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/(loss) (att sch)				
11 Other income (attach schedule) See Line 11 Stmt	11,882.	11,882.	11,882.	
12 <b>Total.</b> Add lines 1 through 11	373,419.	401,380.	373,419.	
<b>ADMINISTRATIVE AND EXPENSES</b>				
13 Compensation of officers, directors, trustees, etc	9,000.			
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule) L-16a Stmt	59,412.			
b Accounting fees (attach sch)				
c Other professional fees (attach sch) L-16c Stmt	1,800.			
17 Interest				
18 Taxes (attach schedule) (separate line for Property Taxes)	74,207.	0.	74,207.	
19 Depreciation (attach sch) and depletion L-19 Stmt	34,859.	34,859.	34,859.	
20 Occasional travel				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule) See Line 23 Stmt	49,191.	90,786.	90,786.	
24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23	228,469.	125,645.	199,852.	
25 Contributions, gifts, grants paid	231,510.			231,510.
26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	459,979.	125,645.	199,852.	231,510.
27 Subtract line 26 from line 12: <b>a Excess of revenue over expenses and disbursements</b>	-86,560.			
<b>b Net investment income</b> (if negative, enter -0-)		275,735.		
<b>c Adjusted net income</b> (if negative, enter -0-)			173,567.	

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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
<b>A S S E T S</b>	1 Cash — non-interest-bearing		29,354.	26,943.
	2 Savings and temporary cash investments	60,463.	205,489.	205,489.
	3 Accounts receivable			
	Less allowance for doubtful accounts			
	4 Pledges receivable			
	Less allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7 Other notes and loans receivable (attach sch)			
	Less allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments — U.S. and state government obligations (attach schedule)			
	b Investments — corporate stock (attach schedule) L-10b Stmt	1,258,160.	1,258,660.	1,827,299.
	c Investments — corporate bonds (attach schedule) L-10c Stmt	54,617.	34,767.	36,347.
	11 Investments — land, buildings, and equipment basis	3,497,007.		
Less accumulated depreciation (attach schedule) L-11 Stmt	301,274.	3,195,733.	2,346,000.	
12 Investments — mortgage loans				
13 Investments — other (attach schedule)				
14 Land, buildings, and equipment basis				
Less accumulated depreciation (attach schedule)				
15 Other assets (describe )				
16 <b>Total assets</b> (to be completed by all filers — see instructions. Also, see page 1, item I)	4,565,212.	4,724,003.	4,442,078.	
<b>L I A B I L I T I E S</b>	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe )			
	23 <b>Total liabilities</b> (add lines 17 through 22)			
<b>N E T A S S E T S O R F U N D B A L A N C E S</b>	<b>Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.</b>	<input type="checkbox"/>		
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	<b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.</b>	<input checked="" type="checkbox"/>		
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	4,565,212.	4,724,003.	
	30 <b>Total net assets or fund balances</b> (see the instructions)	4,565,212.	4,724,003.	
	31 <b>Total liabilities and net assets/fund balances</b> (see the instructions)	4,565,212.	4,724,003.	

**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	4,565,212.
2 Enter amount from Part I, line 27a	2	-86,560.
3 Other increases not included in line 2 (itemize) See Other Increases Stmt	3	259,471.
4 Add lines 1, 2, and 3	4	4,738,123.
5 Decreases not included in line 2 (itemize) See Other Decreases Stmt	5	14,120.
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	4,724,003.

**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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a See attached		P	various	various
b Lot 1 of CSM 4998, WI Dells, WI		D	10/01/01	various
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 66,441.	0.	68,873.	-2,432.
b 33,368.		2,975.	30,393.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
a			-2,432.
b			30,393.
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div style="border: 1px solid black; padding: 2px; display: inline-block;">           If gain, also enter in Part I, line 7            If (loss), enter -0- in Part I, line 7         </div>		2	27,961.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div style="border: 1px solid black; padding: 2px; display: inline-block;">           If gain, also enter in Part I, line 8, column (c) (see the instructions) If (loss), enter -0-            in Part I, line 8         </div>		3	

**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 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 (column (b) divided by column (c))
2008	247,480.	4,868,475.	0.050833
2007	232,310.	5,029,692.	0.046188
2006	207,266.	4,897,912.	0.042317
2005	242,676.	4,761,408.	0.050967
2004	230,967.	4,791,651.	0.048202

2 Total of line 1, column (d)	2	0.238507
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.047701
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	4,301,747.
5 Multiply line 4 by line 3	5	205,198.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,757.
7 Add lines 5 and 6	7	207,955.
8 Enter qualifying distributions from Part XII, line 4	8	231,510.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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**Part VI Excise Tax Based on Investment Income** (Section 4940(a), 4940(b), 4940(e), or 4948 – see 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 instr.)			
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	2,757.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (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	2,757.
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	2,757.
6 Credits/Payments			
a 2009 estimated tax pmts and 2008 overpayment credited to 2009	6a	3,120.	
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	3,120.	
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	363.	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax	11	363.	Refunded

**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 the instructions for definition)? <i>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</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ _____ (2) On foundation managers \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities</i>		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? <i>If 'Yes,' attach a conformed copy of the changes</i>		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?		X
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		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? <i>If 'Yes,' complete Part II, column (c), and Part XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions)		
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? <i>If 'No,' attach explanation</i>	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)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>		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 <u>N/A</u>	13	X	
14	The books are in care of <u>John C. Mitby</u> Telephone no <u>(608) 283-6710</u> Located at <u>2 East Mifflin Street, Suite 200, Madison, WI</u> ZIP + 4 <u>53703</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>			

**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
<b>1 a</b> 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>b</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 the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1 b	
<b>c</b> 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?	1 c	X
<b>2</b> 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))		
<b>a</b> 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 <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> 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 the instructions)	2 b	
<b>c</b> If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
<b>3 a</b> 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>b</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)	3 b	
<b>4 a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	X
<b>b</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?	4 b	X

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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)? (see 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 instructions)?**5b**

Organizations relying on a current notice regarding disaster assistance check here

☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained 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**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

X

**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?**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 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
John Van Wie 1018 Weber Avenue WI Dells WI 53965	Vice President 2.00	4,500.	0.	0.
Bruce C. Rodger 476 County Road I Oxford WI 53952	Secretary 2.00	4,500.	0.	0.
John C. Mitby PO Box 1767 Madison WI 53701	President 10.00	0.	0.	0.

**2** Compensation of five highest-paid employees (other than those included on line 1— see 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				
0				
0				
0				
0				

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

None

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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 – (see instructions). If none, enter 'NONE'.

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
Axley Brynerson, LLP 2 East Mifflin Street, Suite 200 Madison WI 53703	Legal services Legal	59,412.

**Total** number of others receiving over \$50,000 for professional services none**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
<b>1</b> _____ _____	
<b>2</b> _____ _____	
<b>3</b> _____ _____	
<b>4</b> _____ _____	

**Part IX-B** Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
<b>1</b> _____ _____	
<b>2</b> _____ _____	
All other program-related investments. See instructions.	
<b>3</b> _____ _____	
<b>Total.</b> Add lines 1 through 3 <span style="float: right;">▶</span>	

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**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

<b>1</b> Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b> Average monthly fair market value of securities	<b>1a</b>	1,870,997.
<b>b</b> Average of monthly cash balances	<b>1b</b>	150,259.
<b>c</b> Fair market value of all other assets (see instructions)	<b>1c</b>	2,346,000.
<b>d</b> Total (add lines 1a, b, and c)	<b>1d</b>	4,367,256.
<b>e</b> Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b> Acquisition indebtedness applicable to line 1 assets	<b>2</b>	
<b>3</b> Subtract line 2 from line 1d	<b>3</b>	4,367,256.
<b>4</b> Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	65,509.
<b>5</b> Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	4,301,747.
<b>6</b> Minimum investment return. Enter 5% of line 5	<b>6</b>	215,087.

**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.)

<b>1</b> Minimum investment return from Part X, line 6	<b>1</b>	215,087.
<b>2a</b> Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	2,757.
<b>b</b> Income tax for 2009 (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b> Add lines 2a and 2b	<b>2c</b>	2,757.
<b>3</b> Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	212,330.
<b>4</b> Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b> Add lines 3 and 4	<b>5</b>	212,330.
<b>6</b> Deduction from distributable amount (see instructions)	<b>6</b>	
<b>7</b> Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	212,330.

**Part XII Qualifying Distributions** (see instructions)

<b>1</b> Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b> Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	<b>1a</b>	231,510.
<b>b</b> Program-related investments — total from Part IX-B	<b>1b</b>	
<b>2</b> Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b> Amounts set aside for specific charitable projects that satisfy the		
<b>a</b> Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b> Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b> Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	231,510.
<b>5</b> 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 instructions)	<b>5</b>	2,757.
<b>6</b> Adjusted qualifying distributions. Subtract line 5 from line 4	<b>6</b>	228,753.

**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 instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
<b>1</b> Distributable amount for 2009 from Part XI, line 7				212,330.
<b>2</b> Undistributed income, if any, as of the end of 2009				
<b>a</b> Enter amount for 2008 only			231,510.	
<b>b</b> Total for prior years: 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2009				
<b>a</b> From 2004	0.			
<b>b</b> From 2005	0.			
<b>c</b> From 2006	0.			
<b>d</b> From 2007	0.			
<b>e</b> From 2008	0.			
<b>f</b> Total of lines 3a through e	0.			
<b>4</b> Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 231,510.				
<b>a</b> Applied to 2008, but not more than line 2a			231,510.	
<b>b</b> Applied to undistributed income of prior years (Election required — see instructions)				
<b>c</b> Treated as distributions out of corpus (Election required — see instructions)				
<b>d</b> Applied to 2009 distributable amount				
<b>e</b> Remaining amount distributed out of corpus	0.			
<b>5</b> Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))				
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b		0.		
<b>c</b> 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				
<b>d</b> Subtract line 6c from line 6b Taxable amount — see instructions		0.		
<b>e</b> Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount — see instructions			0.	
<b>f</b> Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				212,330.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
<b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	0.			
<b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2005	0.			
<b>b</b> Excess from 2006	0.			
<b>c</b> Excess from 2007	0.			
<b>d</b> Excess from 2008	0.			
<b>e</b> Excess from 2009	0.			

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N/A

**(4) Gross investment income**

[illegible]

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

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
Easter Seals Wisconsin, Inc 101 Nob Hill Madison WI 53713		Other Public Charity	Womens' Dormitory	204,000.
WI Dells High School 520 Race Street WI Dells WI 53965		School District	Scholarships	5,000.
WI Dells Historical Society 620 Elm Street WI Dells WI 53965		Other public charity	Contribution for plaque	22,510.
<b>Total</b>			<b>3a</b>	231,510.
<b>b Approved for future payment</b>				
<b>Total</b>			<b>3b</b>	



<b>Part XVII</b>	<b>Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations</b>
------------------	--

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?

**a** Transfers from the reporting foundation to a noncharitable exempt organization of

- (1) Cash  
(2) Other assets

**b Other transactions**

- (1) Sales of assets to a noncharitable exempt organization
- (2) Purchases of assets from a noncharitable exempt organization
- (3) Rental of facilities, equipment, or other assets
- (4) Reimbursement arrangements
- (5) Loans or loan guarantees
- (6) Performance of services or membership or fundraising solicitations

**c Sharing of facilities, equipment, mailing lists, other assets, or paid employees**

	Yes	No
1 a (1)		X
1 a (2)		X
1 b (1)		X
1 b (2)		X
1 b (3)		X
1 b (4)		X
1 b (5)		X
1 b (6)		X
1 c		X

**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.

[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?


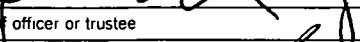
☐ Yes ☒ No

**b** If 'Yes,' complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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

Paid Preparer's Use Only	Signature of officer or trustee 		Date <u>5/16/2010</u>		President	
	Preparer's signature 		Date <u>5/17/2010</u>		Check if self-employed <input type="checkbox"/>	Preparer's Identifying number (See Signature in the instrs) <u>P00386958</u>
	Firm's name (or yours if self-employed), address, and ZIP code <u>Axley Bryn Nelson, LLP</u> <u>2 E. Mifflin St., Ste. 200</u> <u>Madison</u>		EIN <u>39-0804160</u>		Phone no. <u>(608) 257-5661</u>	
		WI 53703				

**BAA**

Form 990-PF (2009)

Form **4562**Department of the Treasury  
Internal Revenue Service (99)**Depreciation and Amortization**  
(Including Information on Listed Property)

▶ See separate instructions. ▶ Attach to your tax return.

OMB No 1545-0172

**2009**Attachment  
Sequence No **67**

Name(s) shown on return

Gregory C. Van Wie Foundation, Inc.

Identifying number

39-1822927

Business or activity to which this form relates

Form 990-PF page 1

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

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

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

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

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

17	MACRS deductions for assets placed in service in tax years beginning before 2009	17	34,859.
18	If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here <input type="checkbox"/>		

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

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

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

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

**Part IV Summary (See instructions)**

21	Listed property Enter amount from line 28	21	
22	Total Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21 Enter here and on the appropriate lines of your return Partnerships and S corporations – see instructions	22	34,859.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

**Part V Listed Property** (Include automobiles, certain other vehicles, cellular telephones, certain computers, and property used for entertainment, recreation, or amusement)

**Note:** For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable

**Section A – Depreciation and Other Information (Caution: See the instructions for limits for passenger automobiles)**

24a Do you have evidence to support the business/investment use claimed?		Yes	No	24b If 'Yes,' is the evidence written?		Yes	No	
(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/Convention	(h) Depreciation deduction	(i) Elected section 179 cost
25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use (see instructions)							25	
26 Property used more than 50% in a qualified business use								
27 Property used 50% or less in a qualified business use								
28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1							28	
29 Add amounts in column (i), line 26. Enter here and on line 7, page 1							29	

**Section B – Information on Use of Vehicles**

Complete this section for vehicles used by a sole proprietor, partner, or other 'more than 5% owner,' or related person. If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

	(a) Vehicle 1		(b) Vehicle 2		(c) Vehicle 3		(d) Vehicle 4		(e) Vehicle 5		(f) Vehicle 6	
30 Total business/investment miles driven during the year (do not include commuting miles)												
31 Total commuting miles driven during the year												
32 Total other personal (noncommuting) miles driven												
33 Total miles driven during the year. Add lines 30 through 32												
	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
34 Was the vehicle available for personal use during off-duty hours?												
35 Was the vehicle used primarily by a more than 5% owner or related person?												
36 Is another vehicle available for personal use?												

**Section C – Questions for Employers Who Provide Vehicles for Use by Their Employees**

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons (see instructions).

	Yes	No
37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?		
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See the instructions for vehicles used by corporate officers, directors, or 1% or more owners.		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use? (See instructions)		

**Note:** If your answer to 37, 38, 39, 40, or 41 is 'Yes,' do not complete Section B for the covered vehicles.

**Part VI Amortization**

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
42 Amortization of costs that begins during your 2009 tax year (see instructions)					
43 Amortization of costs that began before your 2009 tax year					43
44 Total. Add amounts in column (f). See the instructions for where to report					44



Form 990-PF, Page 1, Part I, Line 11

**Line 11 Stmt**

Other income	Rev/Exp Book	Net Inv Inc	Adj Net Inc
Muskegon Township LDHA	2,115.	2,115.	2,115.
Muskegon Township LDHA	124.	124.	124.
Coldwater Canyon, LLP	9,640.	9,640.	9,640.
Coldwater Canyon, LLP	3.	3.	3.
Total	11,882.	11,882.	11,882.

Form 990-PF, Page 1, Part I, Line 23

**Line 23 Stmt**

Other expenses	Rev/Exp Book	Net Inv Inc	Adj Net Inc	Charity Disb
Rental Property Expenses	30,540.	90,786.	90,786.	
Bank/Investment Fees	2,059.			
Insurance	16,592.			
Total	49,191.	90,786.	90,786.	

Form 990-PF, Page 2, Part III, Line 3

**Other Increases Stmt**

Distributions from partnership	9,000.
Capital Gain	27,961.
Uncleared check-09 dist. to Easter Seals	200,000.
Uncleared check-09 dist. to WI Dells Historical Society	22,510.
Total	259,471.

Form 990-PF, Page 2, Part III, Line 5

**Other Decreases Stmt**

Undistributed K-1 income	11,882.
Foundation taxes	2,238.
Total	14,120.

Form 990-PF, Page 1, Part I

**Line 16a - Legal Fees**

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Axley Brynelson, LLP	Legal	59,412.			
Total		59,412.			

Form 990-PF, Page 1, Part I

**Line 16c - Other Professional Fees**

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Rawson Realty	Appraisal	1,800.			
Total		<u>1,800.</u>			

Form 990-PF, Line 19

**Allocated Depreciation**

Description	Date Acquire	Cost or Basis	Prior Yr Depr	Mthd	Life	Current Depr	Net Invest Income	Adjusted Net Income
Broadway & Superior	06/01/01	710000	118694	SL	39.00	15618	15618	15618
Bridge Mall Retail	06/01/01	1926747	141974	SL	39.00	18692	18692	18692
Bridge Mall- W10794 P1	06/01/01	530000	8120	SL	39.00	549	549	549
Total							<u>34859</u>	<u>34859</u>

Form 990-PF, Page 2, Part II, Line 10b

**L-10b Stmt**

Line 10b - Investments - Corporate Stock:	End of Year	
	Book Value	Fair Market Value
Bank of Wisconsin Dells	1,178,760.	1,737,120.
See attached Baird Statement	79,900.	90,179.
Total	<u>1,258,660.</u>	<u>1,827,299.</u>

Form 990-PF, Page 2, Part II, Line 10c

**L-10c Stmt**

Line 10c - Investments - Corporate Bonds:	End of Year	
	Book Value	Fair Market Value
Eastern Svgs Bank 4.8%, due 1/1/11	10,142.	10,313.
Genl Electric Corp 5.2%, due 2/1/2011	24,625.	26,034.
Total	<u>34,767.</u>	<u>36,347.</u>

Form 990-PF, Page 2, Part II, Line 11

**L-11 Stmt**

Line 11b - Description of Investments Land, Buildings and Equipment	(a) Cost/Other Basis	(b) Accumulated Depreciation	(c) Book Value
Properties	3,238,989.	301,274.	2,937,715.

Form 990-PF, Page 2, Part II, Line 11

Continued

**L-11 Stmt**

<b>Line 11b - Description of Investments Land, Buildings and Equipment</b>	<b>(a) Cost/Other Basis</b>	<b>(b) Accumulated Depreciation</b>	<b>(c) Book Value</b>
Motel Property- vacant land	258,018.	0.	258,018.
Total	<u>3,497,007.</u>	<u>301,274.</u>	<u>3,195,733.</u>

# ASSET DETAILS

This section shows the cash, cash alternatives and/or securities in your account. It reflects market values as of the close of business, December 31, 2009. Please note, unrealized gain/loss is being prepared for informational purposes only and should not be used for tax preparation without the assistance of your tax advisor.

## CASH AND CASH ALTERNATIVES

	Current Value	Cost	Unrealized Gain/(-)Loss*	Anticipated Annualized Income	Current Yield %
INSURED DEPOSIT M & I	205,489.31	205,489.31		102.74	0.05%
Net yield from 12/01/09 - 12/31/09 was 0.05% (Compounded)					
Deposits held at M&I Bank are insured by the FDIC up to \$250,000					
<b>Total Cash and Cash Alternatives</b>	<b>\$205,489.31</b>	<b>\$205,489.31</b>		<b>\$102.74</b>	<b>0.05%</b>

## PORTFOLIO ASSETS

### Stocks/Options

	Symbol/CUSIP Bond Rating+	Quantity	Current Price	Average Unit Cost	Current Value	Cost	Unrealized Gain/(-)Loss*	Anticipated Annualized Income	Current Yield %
AT&T INC	T	100	28.0300	25.1987	2,803.00	2,519.87	283.13	168.00	5.99%
ABBOTT LABORATORIES	ABT	45	53.9900	43.0733	2,429.55	1,938.30	491.25	72.00	2.96%
AUTODESK INC	ADSK	75	25.4100	24.1387	1,905.75	1,810.40	95.35	N/A	N/A
AUTOMATIC DATA PROCESSING INC	ADP	65	42.8200	40.5406	2,783.30	2,635.14	148.16	88.40	3.18%
BARD C R INCORPORATED	BCR	20	77.9000	78.9695	1,558.00	1,579.39	-21.39	13.60	0.87%
BOEING COMPANY	BA	40	54.1300	40.7025	2,165.20	1,628.10	537.10	67.20	3.10%
BRISTOL MYERS SQUIBB COMPANY	BMJ	67	25.2500	24.5800	1,691.75	1,646.86	44.89	85.76	5.07%
Coca-Cola Company	KO	45	57.0000	51.4584	2,565.00	2,315.63	249.37	73.80	2.88%
COMMERCE BANCSHARES INC	CBSH	44	38.7200	39.8348	1,703.68	1,752.73	-49.05	42.24	2.48%
CONOCOPHILLIPS	COP	45	51.0700	30.2282	2,298.15	1,360.27	937.88	90.00	3.92%
EMERSON ELECTRIC COMPANY	EMR	60	42.6000	29.9477	2,556.00	1,796.86	759.14	80.40	3.15%
EXPEDITORS INTERNATIONAL OF WASHINGTON INC	EXPD	44	34.7700	29.5305	1,529.88	1,299.34	230.54	16.72	1.09%
EXXON MOBIL CORP	XOM	35	68.1900	44.6800	2,386.65	1,563.80	822.85	58.80	2.46%
FMC CORP NEW	FMC	30	55.7600	49.5480	1,672.80	1,486.44	186.36	15.00	0.90%
FLOWERVE CORP	FLS	20	94.5300	95.0000	1,890.60	1,900.00	-9.40	N/A	N/A
GRACO INCORPORATED	GGG	85	28.5700	19.4812	2,428.45	1,655.90	772.55	64.60	2.66%
GRAINGER W W INC	GWW	25	96.8300	74.3528	2,420.75	1,858.82	561.93	46.00	1.90%
HERSHEY COMPANY	HSY	65	35.7900	47.2023	2,326.35	3,068.15	-741.80	77.35	3.32%
ILLINOIS TOOL WORKS INC	ITW	45	47.9900	46.9558	2,159.55	2,113.01	46.54	55.80	2.58%

GREGORY C VAN WIE CHARITABLE  
FOUNDATION INC  
JOHN C MITBY

Statement Period JANUARY 1 - DECEMBER 31, 2009  
Account Number 3862-8698 AT23

BAIRD

ASSET DETAILS continued

				Current Price	Average Unit Cost	Current Value	Cost	Unrealized Gain/(-)Loss*	Anticipated Annualized Income	Current Yield %
Stocks/Options continued										
INTEL CORP	INTC		95	20 4000	13 9068	1,938 00	1,321 15	616 85	53 29	2 75%
INTERNATIONAL BUSINESS MACHINES CORP	IBM		15	130 9000	80 0900	1,963 50	1,201 35	762 15	33 00	1 68%
JOHNSON & JOHNSON	JNJ		40	64 4100	60 0175	2,576 40	2,400 70	175 70	78 40	3 04%
KELLOGG COMPANY	K		50	53 2000	50 7332	2,660 00	2,536 66	123 34	75 00	2 82%
KIMBERLY-CLARK CORP	KMB		40	63 7100	64 1420	2,548 40	2,565 68	-17 28	96 00	3 77%
LINCOLN NATIONAL CORP	LNC		50	24 8800	50 6892	1,244 00	2,534 46	-1,290 46	2 00	0 16%
MC CORMICK & COMPANY INC NON VOTING	MKC		70	36 1300	33 6963	2,529 10	2,358 74	170 36	72 80	2 88%
MEAD JOHNSON NUTRITION COMPANY CLASS A	MJN		49	43 7000	36 3620	2,141 30	1,781 74	359 56	39 20	1 83%
MEDTRONIC INC	MDT		60	43 9800	30 3500	2,638 80	1,821 00	817 80	49 20	1 86%
MICROSOFT CORP	MSFT		85	30 4800	23 2194	2,590 80	1,973 65	617 15	44 20	1 71%
MOLEX INCORPORATED CLA	MOLXA		135	19 1300	11 2948	2,582 55	1,524 80	1,057 75	82 35	3 19%
NIKE INC CLASS B	NKE		35	66 0700	64 2860	2,312 45	2,250 01	62 44	37 80	1 63%
PNC FINANCIAL SERVICES GROUP INC	PNC		35	52 7900	61 3266	1,847 65	2,146 43	-298 78	14 00	0 76%
QUEST DIAGNOSTICS INC	DGX		35	60 3800	51 6023	2,113 30	1,806 08	307 22	14 00	0 66%
SCHLUMBERGER LTD	SLB		35	65 0900	40 9363	2,278 15	1,432 77	845 38	29 40	1 29%
STANLEY WORKS	SWK		40	51 5100	35 2873	2,060 40	1,411 49	648 91	52 80	2 56%
STRYKER CORP	SYK		40	50 3700	40 9123	2,014 80	1,636 49	378 31	24 00	1 19%
SUNOCO INC	SUN		70	26 1000	42 6853	1,827 00	2,987 97	-1,160 97	84 00	4 60%
SYSCO CORP	SY		90	27 9400	28 2650	2,514 60	2,543 85	-29 25	90 00	3 58%
ULTRA PETROLEUM CORP	UPL		27	49 8600	46 5852	1,346 22	1,257 80	88 42	N/A	N/A
UNITED TECHNOLOGIES CORP	UTX		35	69 4100	60 0757	2,429 35	2,102 65	326 70	53 90	2 22%
WINDSTREAM CORP	WIN		250	10 9900	9 5019	2,747 50	2,375 48	372 02	250 00	9 10%
<b>Total Stocks/Options</b>						<b>\$90,178.68</b>	<b>\$79,899.96</b>	<b>\$10,278.72</b>	<b>\$2,390.92</b>	<b>2.65%</b>

Taxable Bonds

EASTERN SVGS BANK FSB	27689NDW7	10,000	103 1250 "	101 4210	10,312 50	10,142 10	170 40	480 00	4 65%
HUNTS VALLEY MD CTF DEP									
FDIC ACT/365 SEMI									
CPN 4 800% DUE 01/11/11									
DTD 01/11/06 FC 07/11/06									
GENL ELECTRIC CAP CORP	36962G2C7	25,000	104 1360	98 5000	26,034 00	24,625 00	1,409 00	1,300 00	4 99%
MEDIUM TERM NOTE B/E	S&P AA+								
SERIES A	Moody Aa2								
CPN 5 200% DUE 02/01/11									
DTD 01/29/07 FC 08/01/07									

GREGORY C VAN WIE CHARITABLE  
FOUNDATION INC  
JOHN C MITBY

Statement Period JANUARY 1 - DECEMBER 31, 2009  
Account Number 3862-8698 AT23

BAIRD

ASSET DETAILS continued

Symbol/CUSIP Bond Rating+	Quantity	Current Price	Average Unit Cost	Current Value	Cost	Unrealized Gain/(-)Loss*	Anticipated Annualized Income	Current Yield %
<b>Total Taxable Bonds</b>	<b>35,000</b>			<b>\$36,346.50</b>	<b>\$34,767.10</b>	<b>\$1,579.40</b>	<b>\$1,780.00</b>	<b>4.90%</b>
<b>Total Portfolio Assets</b>				<b>\$126,525.18</b>	<b>\$114,667.06</b>	<b>\$11,858.12</b>	<b>\$4,170.92</b>	<b>3.30%</b>
<b>Total Assets</b>				<b>\$332,014.49</b>	<b>\$320,156.37</b>	<b>\$11,858.12</b>	<b>\$4,273.66</b>	<b>1.29%</b>

+ Bond ratings of securities displayed on your statement were obtained from various rating services. There is no guarantee with respect to the accuracy of this information.

\* Please note, "Unrealized Gain/(-)Loss" does not equal the total current value minus the total cost if any value or cost amounts are missing.

" This price has been provided by a national pricing service and is derived from a 'market-driven pricing model.' It may be higher or lower than the price you would actually receive in the market.

**GREGORY C VAN WIE CHARITABLE  
FOUNDATION INC  
JOHN C MITBY**

Statement Period **JANUARY 1 - DECEMBER 31, 2009**  
Account Number **3862-8698 AT23**

**BAIRD**

**CASH MANAGEMENT CHECKWRITING EXPENSE SUMMARY**

Expense Category	Expense Code	This Period	Year-to-Date	Pct of Total
Undefined	N/A	12,080 00	122,244 40	100%

**Cash Management Expense Summary**      **\$12,080.00**      **\$122,244.40**      **100%**

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For calls placed internationally, please call collect (701) 461-0621

**REALIZED GAINS/(-)LOSSES**

This section presents estimated realized gains or losses for your information only, and should not be used for tax purposes. To calculate gains or losses, the position with the highest purchase price has been liquidated first unless you have instructed us otherwise. We suggest you review this information for accuracy and contact your Baird Financial Advisor with any questions.

**Stocks/Options**

	Date Acquired	Date Sold	Quantity	Purchase Price	Sale Price	Cost Basis	Sale Proceeds	Realized Gain/(-)Loss*
<b>AT&amp;T INC</b>								
	08/10/09	12/28/09	5	25 5700	28 2900	127 85	141 46	13 61 (ST)
	05/31/06	12/28/09	25	25 9300	28 2900	648 25	707 22	58 97 (LT)
	07/10/07	12/28/09	5	40 1000	28 2900	200 50	141 44	-59 06 (LT)
			35			976 60	990 12	13 52
<b>ABBOTT LABORATORIES</b>								
	03/31/09	12/28/09	5	48 2699	54 3800	241 35	271 89	30 54 (ST)
	08/10/09	12/28/09	5	44 0200	54 3800	220 10	271 90	51 80 (ST)
	01/08/02	12/28/09	10	51 3909	54 3800	522 77	543 78	21 01 (LT)
			20			984 22	1 087 57	103 35
<b>AUTODESK INC</b>								
	09/29/09	12/28/09	15	24 2896	25 4500	364 35	381 74	17 39 (ST)
<b>AUTOMATIC DATA PROC INC</b>								
	03/13/07	12/28/09	5	43 4849	43 0800	217 43	215 40	-2 03 (LT)
	08/07/07	12/28/09	15	48 4000	43 0800	726 00	646 17	-79 83 (LT)
			20			943 43	861 57	-81 86
<b>BARC C R INC</b>								
	01/29/09	12/28/09	10	85 9521	79 0500	859 52	790 47	-69 05 (ST)
<b>BEMIS COMPANY INC</b>								
	08/10/09	12/11/09	25	26 8400	30 5045	671 00	762 60	91 60 (ST)
	05/31/06	12/11/09	25	30 3700	30 5045	759 25	762 59	3 34 (LT)
	08/07/07	12/11/09	35	29 3800	30 5045	1 028 30	1 067 62	39 32 (LT)
			85			2 458 55	2 592 81	134 26
<b>BOEING COMPANY</b>								
	02/02/09	12/28/09	5	40 7027	55 0200	203 52	275 10	71 58 (ST)
	10/10/08	12/28/09	15	43 7500	55 0200	656 25	825 27	169 02 (LT)
			20			859 77	1 100 37	240 60
<b>COCA COLA COMPANY</b>								
	08/28/08	12/28/09	15	53 2895	57 3200	799 35	859 77	60 42 (LT)
<b>CONOCOPHILLIPS</b>								
	08/10/09	12/28/09	30	44 3500	51 0000	1 330 50	1 529 96	199 46 (ST)
<b>DIEBOLD INCORPORATED</b>								
	12/27/07	09/28/09	34	29 5000	32 6801	1 003 00	1 111 09	108 09 (ST)
<b>DIEBOLD INCORPORATED</b>								
	12/27/07	09/29/09	16	29 5000	32 6071	472 00	521 69	49 69 (LT)
<b>EMERSON ELECTRIC COMPANY</b>								
	08/10/09	12/28/09	20	35 6600	43 3500	713 20	866 97	153 77 (ST)
<b>EXPEDITORS INTL WASH INC</b>								
	01/29/09	12/28/09	11	29 5509	35 2800	325 06	388 07	63 01 (ST)
	07/13/09	12/28/09	9	29 9512	35 2800	269 56	317 51	47 95 (ST)
			20			594 62	705 58	110 96
<b>EXXON MOBIL CORP</b>								
	08/10/09	12/28/09	15	69 3200	68 9300	1 039 80	1 033 92	-5 88 (ST)
<b>FMC CORP NEW</b>								
	06/19/09	12/28/09	10	49 8080	56 4800	498 08	564 78	66 70 (ST)

GREGORY C VAN WIE CHARITABLE  
FOUNDATION INC  
JOHN C MITBY

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REALIZED GAINS/(-)LOSSES continued

Stocks/Options continued

	Date Acquired	Date Sold	Quantity	Purchase Price	Sale Price	Cost Basis	Sale Proceeds	Realized Gain/(-)Loss*
GENERAL ELECTRIC COMPANY	11/16/06	07/06/09	30	35 9723	11 3100	1,079 17	339 29	-739 88 (LT)
GENERAL ELECTRIC COMPANY	11/16/06	07/07/09	45	35 9723	11 2265	1,618 74	505 17	-1,113 57 (LT)
	03/13/07	07/07/09	40	34 0800	11 2265	1,363 20	449 05	-914 15 (LT)
			85			2,981 94	954 22	-2,027 72
GRACO INCORPORATED	08/10/09	12/28/09	25	25 4000	29 8200	635 00	745 48	110 48 (ST)
GRAINGER W W INC	04/14/08	12/28/09	10	82 5177	97 7800	825 17	977 77	152 60 (LT)
HERSHEY COMPANY	07/10/07	12/28/09	10	50 5200	36 5300	505 20	365 29	-139 91 (LT)
ILLINOIS TOOL WORKS INC	09/09/08	12/28/09	10	48 7890	47 9900	487 89	479 88	-8 01 (LT)
INTEL CORP	05/31/06	12/28/09	100	17 9690	20 2227	1,796 90	2,022 21	225 31 (LT)
JOHNSON & JOHNSON	05/31/06	12/28/09	10	60 1300	64 8400	601 30	648 38	47 08 (LT)
KELLOGG COMPANY	08/25/08	12/28/09	15	53 7490	53 9100	806 24	808 62	2 38 (LT)
KIMBERLY-CLARK CORP	05/25/05	12/28/09	10	65 0500	64 1400	663 58	641 38	-22 20 (LT)
L3 COMMUNICATIONS HLDGS	08/10/09	12/10/09	10	74 9000	81 9687	749 00	819 67	70 67 (ST)
	12/15/06	12/10/09	20	83 7807	81 9687	1,675 61	1,639 32	-36 29 (LT)
			30			2,424 61	2,458 99	34 38
LINCOLN NATL CORP IN	01/08/02	08/28/09	5	49 7500	25 4378	253 45	127 18	-126 27 (LT)
MC CORMICK & COMPANY	05/25/05	12/28/09	20	34 3300	36 4400	705 53	728 78	23 25 (LT)
MEDTRONIC INC	08/10/09	12/28/09	10	36 0100	44 1300	360 10	441 28	81 18 (ST)
	12/04/08	12/28/09	10	30 3500	44 1300	303 50	441 29	137 79 (LT)
			20			663 60	882 57	218 97
MERCK & COMPANY INC	05/31/06	06/12/09	50	33 0300	26 9512	1,651 50	1,347 53	-303 97 (LT)
	07/10/07	06/12/09	15	49 2100	26 9512	738 15	404 25	-333 90 (LT)
			65			2,389 65	1,751 78	-637 87
MICROSOFT CORP	08/10/09	12/28/09	10	23 4400	30 9800	234 40	309 79	75 39 (ST)
	08/28/09	12/28/09	10	24 8289	30 9800	248 29	309 79	61 50 (ST)
			20			482 69	619 58	136 89
MOLEX INC CLASS A	08/10/09	12/28/09	25	16 2500	19 1500	406 25	478 73	72 48 (ST)
	12/04/08	12/28/09	20	11 2949	19 1500	225 90	382 99	157 09 (LT)
			45			632 15	861 72	229 57
NEWELL RUBBERMAID INC	05/25/05	01/29/09	165	22 3600	9 0899	3,806 40	1,499 82	-2,306 58 (LT)
PNC FINL SVCS GROUP INC	01/08/02	12/28/09	15	60 3100	53 6300	919 91	804 42	-115 49 (LT)
QUEST DIAGNOSTICS INC	08/10/09	12/28/09	10	53 2000	61 5600	532 00	615 58	83 58 (ST)
SCHLUMBERGER LTD	01/29/09	12/28/09	15	42 8254	65 6700	642 39	985 02	342 63 (ST)
	10/10/08	12/28/09	5	53 4249	65 6700	267 12	328 34	61 22 (LT)
			20			909 51	1,313 36	403 85
SIGMA ALDRICH CORP	01/29/09	06/18/09	34	38 1899	49 0783	1,298 46	1,668 61	370 15 (ST)
SIGMA ALDRICH CORP	01/29/09	06/19/09	16	38 1899	49 0734	611 04	785 14	174 10 (ST)
STANLEY WORKS	04/14/08	12/28/09	25	47 8137	52 5500	1,195 34	1,313 72	118 38 (LT)
	09/09/08	12/28/09	15	48 1468	52 5500	722 20	788 22	66 02 (LT)
			40			1,917 54	2,101 94	184 40
STRYKER CORP	06/12/09	12/28/09	15	40 9123	51 0600	613 69	765 88	152 19 (ST)
SUNOCO INC	09/07/07	12/28/09	15	73 6051	25 4400	1,104 08	381 59	-722 49 (LT)
SYSCO CORP	05/31/06	12/28/09	25	30 6100	28 4800	765 25	711 98	-53 27 (LT)
UNITED TECHNOLOGIES CORP	05/31/06	12/28/09	15	62 9300	70 1500	943 95	1,052 22	108 27 (LT)
VF CORP	07/06/09	10/14/09	10	53 9867	75 5483	539 87	755 47	215 60 (ST)



GREGORY C VAN WIE CHARITABLE  
FOUNDATION INC  
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REALIZED GAINS/(-)LOSSES continued

Stocks/Options continued

	Date Acquired	Date Sold	Quantity	Purchase Price	Sale Price	Cost Basis	Sale Proceeds	Realized Gain/(-)Loss*
	07/07/09	10/14/09	25	54 4231	75 5483	1,360 58	1,888 65	528 07 (ST)
			35			1,900 45	2,644 12	743 67
WINDSTREAM CORP	01/08/02	12/28/09	3	10 3514	11 6201	31 71	34 86	3 15 (LT)
	08/22/06	12/28/09	142	12 9399	11 6201	1,837 46	1,650 00	-187 46 (LT)
			145			1,869 17	1,684 86	-184 31
<b>Total Stocks/Options</b>						<b>\$49,022.51</b>	<b>\$46,441.05</b>	<b>-\$2,581.46</b>

Taxable Bonds

VOLKSWAGEN BK5 25 060109	06/02/06	06/01/09	20,000	99 2500	100 0000	19,850 00	20,000 00	150 00 (LT)
<b>Total Taxable Bonds</b>						<b>\$19,850.00</b>	<b>\$20,000.00</b>	<b>\$150.00</b>

Total Realized Gains/(-)Losses

**\$68,872.51** **\$66,441.05** **-\$2,431.46**

Total Net Short-Term (ST)

Total Net Long-Term Subject to 15% Maximum Tax Rate (LT)

**\$15,094.98** **\$18,165.46** **\$3,070.50**  
**\$53,777.55** **\$48,275.59** **-\$5,501.96**

\* Please note "Realized Gain/(-)Loss" does not equal total sale proceeds minus total cost basis if any cost basis amounts are missing

INTERESTED PARTIES AND/OR SUPPORTING REPRESENTATIVE(S)

Per your request, a copy of this statement has also been sent to:

EDWARD TERRY  
SUBY VON HADEN  
1221 JOHN Q HAMMONS DRIVE  
MADISON WI 53717-8100

Your Supporting Representative(s) is (are)

ROBERT W BAIRD & CO INC  
JOEL MC NEIL  
Telephone (608) 251-2351

ROBERT W BAIRD & CO INC  
VICTOR RODRIGUEZ  
Telephone (608) 251-2351

ROBERT W BAIRD & CO INC  
ADVISORY SERVICES