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# , Form **990-PF**

## **Return of Private Foundation**

### or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

OMB No 1545-0052

Interr	ial Revenu	e Service NULE	. The loundation may t	e able t	o use a copy of this	return to satisfy state re	μυι	ung requirements.	
For	calendar	year 2009, or tax year be	eginning		<u>-</u>	, and ending			
G (	check all	that apply: 🔲 Ini	tıal return			ormer public charity	_	Final return	ı
			nended return	1	X Address chan	ge L_	=-	Name change	
Use	the IRS	Name of foundation					_  ′	A Employer identification	number
	abel.		D 4		r			20 1002001	
	•	The Merrill Number and street (or P O b				Room/suite	٦.	39-1892801	·
	print r type.	· '			Sireer address)	300	<u> </u>	B Telephone number (414)291-8	2260
	Specific	400 East Wi City or town, state, and 2		<u>e</u>	<del></del>	1300			
Inst	ructions.	Milwaukee,						C If exemption application is p D 1. Foreign organization:	
H (	heck tyn		Section 501(c)(3) ex	emnt nr	ıvate foundation		٦	Foreign organizations mi check here and attach or	eeting the 85% test,
$\ddot{\Box}$	<b>-</b>	n 4947(a)(1) nonexempt of	. —		xable private founda	ntion			
1 Fa		t value of all assets at end				Accrual	7	E If private foundation sta under section 507(b)(1	
		II, col (c), line 16)	· —	her (spe			١,	F If the foundation is in a	
	\$	1,308,			must be on cash t	basis.)	-	under section 507(b)(1	
Pa	ırt I 🛕	nalysis of Revenue and E	xpenses	(a)	Revenue and	(b) Net investment		(c) Adjusted net	(d) Disbursements
	ne	he total of amounts in columns ecessarily equal the amounts in	(b), (c), and (d) may not column (a))	exp	enses per books	income		income	for charitable purposes (cash basis only)
	1 Co	ntributions, gifts, grants, e	tc., received					N/A	
		eck 🕨 🗶 if the foundation is n					$\perp$		
	3 Inte	erest on savings and temporary th investments	,						
	4 Div	ridends and interest from s	securities		13,879.	13,879	<u> </u>		Statement 1
	5a Gro	oss rents					_		
	<b>b</b> Net	rental income or (loss)					4		
ē		gain or (loss) from sale of asse			-12,972.		$\dashv$		
Revenue	D ass	ets on line 6a	251,291.				+		<u> </u>
ě		oital gain net income (from Part	IV, line 2)				1		 
	l	t short-term capital gain	OFINED	$\dashv$			$\dashv$		
	Gro	ome modifications of the community of th	-CEIVEL	0			$\dashv$		
		allowances		80			$\dashv$		
		s Cost of goods spin	AR 0 8 2010	8		····	_		
		ner income		<del>]C </del>	-	<del></del>	十		
		tal. Add lines through	POEN IIT		907.	13,879			
		npensation of officers, director			0.	C	-		0.
		ner employee salaries and							
		nsion plans, employee ber	nefits						
ses	<b>16a</b> Leg	gal fees							
Expenses	b Acc	counting fees			-				
Ä	c Oth	ner professional fees	Stmt 2		5,925.	5,925			0.
<u>š</u>	17 Inte	erest					_		
trat	18 Tax	æs					4		
nis	17 Into 18 Tax 19 Dep 20 Occ 21 Tra 22 Prii	preciation and depletion				<del></del> -	4		<u> </u>
Ë	<b>20</b> Occ	cupancy							
Ϋ́	<b>21</b> Tra	vel, conferences, and mee	etings				4		
		nting and publications	a		10		_		
ing	23 Oth	ner expenses	Stmt 3		10.	10	<del>' - </del>		0.
Operating	24 To1	tal operating and adminis			5 035	F 02F	.		
ö	ext	penses. Add lines 13 throi	_		5,935.	5,935	<del>'  </del>	<del></del>	06 013
_	25 CO	ntributions, gifts, grants pa			96,912.		+	**	96,912.
		tal expenses and disburs	ements.		102,847.	5,935			96,912.
	i	d lines 24 and 25 btract line 26 from line 12:			104,04/	5,333	+		30,312.
			ı	_	101,940.				
		ess of revenue over expenses : t investment income (if ne			TOT/JEU.	7,944			
		justed net income (if negati	i			,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	7	N/A	
9235 02-02	01 0-10 L	HA For Privacy Act and		Act Noti	ce, see the instruct	tions.			Form <b>990-PF</b> (2009)
					,	* *			,

D	art	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of	year
	ai r	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments	631,901.	105,721.	105,721.
	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			····
İ	7	Other notes and loans receivable			
		Less; allowance for doubtful accounts ▶			
ş	8	Inventories for sale or use	-		
Assets	9	Prepaid expenses and deferred charges	215.		· · · · · · · · · · · · · · · · · · ·
4	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock Stmt 4	466,097.	840,958.	1,100,729.
	C	Investments - corporate bonds Stmt 5	46,835.	96,429.	102,272.
	11	Investments - land, buildings, and equipment basis	•		
		Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other			
	14	Land, buildings, and equipment: basis ▶			
		Less accumulated depreciation			
	15	Other assets (describe			
İ					
$\rightarrow$	16	Total assets (to be completed by all filers)	1,145,048.	1,043,108.	1,308,722.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
es	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
jab	21	Mortgages and other notes payable			
-	22	Other liabilities (describe )			
_	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here			
S		and complete lines 24 through 26 and lines 30 and 31.			
၁၁		Unrestricted			
alar		Temporarily restricted			
9	26	Permanently restricted			
Š		Foundations that do not follow SFAS 117, check here			
~		and complete lines 27 through 31.	4 040 505	1 040 505	
ts	27	Capital stock, trust principal, or current funds	1,242,535.	1,242,535.	
sse		Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
*	29	Retained earnings, accumulated income, endowment, or other funds		-199,427.	
ž	30	Total net assets or fund balances	1,145,048.	1,043,108.	
			1 145 040	1 042 100	
_	<u>31</u>	Total liabilities and net assets/fund balances	1,145,048.	1,043,108.	
Pa	ırt	Analysis of Changes in Net Assets or Fund B	alances		
$\equiv$					
		net assets or fund balances at beginning of year - Part II, column (a), line	SU .		1 1/5 0/0
•		t agree with end-of-year figure reported on prior year's return)			1,145,048. -101,940.
		amount from Part I, line 27a		2	
-		increases not included in line 2 (itemize)		3	$\frac{0.}{1,043,108.}$
		ines 1, 2, and 3		4	1,043,108.
		eases not included in line 2 (itemize)  net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	dump (h) line 20	5 6	1,043,108.
<u>6 I</u>	otal	nici assets of fund balances at end of year time 4 finitus line 5) - Part II, co	annul (n) inte on		Form <b>990-PF</b> (2009)

<u>39-1892801</u>

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The Merrill Foundation, Inc.

Form 990-PF (2009)

		rill Foundat sses for Tax on In					<u>-</u>	3	9-189	2801	Page 3
(a) List and desc	ribe the ki	nd(s) of property sold (e.g.	, real estate,	t moonie	(b)	How as	equired hase		acquired day, yr.)		te sold
<del></del>	arenouse;	or common stock, 200 shs	. MLU (0.)		l D	- Don	ation	(1110., 0	Jay, yr.)		day, yr.)
b See Attached	C+ a	tomonts			1						
c Dee Accached	Bla	cemencs		-	<del> </del>					-	
d											
e											
(e) Gross sales price	(f) l	Depreciation allowed (or allowable)		st or other basis expense of sale					iain or (loss) s (f) minus (		
<u>a</u>					_						
<u>b</u>				<del></del>			_				
<u> </u>		·····									
e 251,291.				264,26			_			_12	,972.
e 251, 291.  Complete only for assets shown	l		he foundation		<u> </u>			\ Gaine ((	Col. (h) gain i		, 314.
(i) F.M.V. as of 12/31/69	<del> </del>	(j) Adjusted basis as of 12/31/69	(k) E>	cess of col. (i)				. (k), but i	not less than (from col. (f	-0-) or	
a				-							
b											
C											
d											
e							<del></del>			<u>-12</u>	<u>,972.</u>
2 Capital gain net income or (net ca	apıtal loss)	If gain, also enter If (loss), enter -0-	ın Part I, line ın Part I, line	7 7	}	2				-12	,972.
3 Net short-term capital gain or (los	ss) as defi	ned in sections 1222(5) ani	d (6):		(						
If gain, also enter in Part I, line 8,	•	• •			)		1				
If (loss), enter -0- in Part I, line 8	la da a C	ection 4940(e) for	Daduasa	Toy on Not		3			N/A	<u>.</u>	
<del></del>		<del>- · · · · · · · · · · · · · · · · · · ·</del>					nent inc	ome			
(For optional use by domestic private	e foundation	ons subject to the section 4	940(а) tax ог	net investment in	come	3.)					
If section 4940(d)(2) applies, leave t	his part bl	ank.									
Man the foundation liable for the goo	tion 4040	tay on the distributable am	ount of any v	oor in the base no	riod0						X No
Was the foundation liable for the sec If "Yes," the foundation does not qua				•	iluur						IA INO
1 Enter the appropriate amount in					es.						
(a)		(b)			(c)				Dietub	(d)	1.00
Base periód years Calendar year (or tax year beginni	ng in)	Adjusted qualifying dist	ributions	Net value of no			use assets		(col. (b) divi	ution ratio ded by col	. (c))
2008		19:	5,660.		1	, 41	3,972			.1	38376
2007		32	5,247.		1	,77	4,368			.1	83303
2006		22'	7,700.				9,454			. 1	34777
2005		31	5,191.		_ 1	,78	4,638			.1	76613
2004		130	0,300.		1	<u>, 65</u>	6,546	•		.0	<u>78658</u>
2 Total of line 1, column (d)								2		7	11727
3 Average distribution ratio for the			n line 2 by 5,	or by the number	of ye	ars				1	4224E
the foundation has been in existe	nce if less	than 5 years						3		• 1	42345
4 Enter the net value of noncharitat	ole-use ass	sets for 2009 from Part X, I	ne 5					4		1,167	,147.
5 Multiply line 4 by line 3								_5		166	,138.
6 Enter 1% of net investment incon	ne (1% of	Part I, line 27b)						6			79.
7 Add lines 5 and 6								7		166	,217.
8 Enter qualifying distributions from	n Part XII	line 4						8			,912.
If line 8 is equal to or greater than	•		1b, and comp	olete that part usin	g a 1	% tax	rate.		<u> </u>		<u></u>
See the Part VI instructions.										rm 000	<b>PF</b> (2009)
923521 02-02-10									10	リリ マグリー	• • (ZUU9)

_	m 990-PF (2009) The Merrill Foundation, Inc.		<u> 18928</u> (			Page 4
	art VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or	<u> 4948 -</u>	see ins	tru	ctio	ns)
16	a Exempt operating foundations described in section 4940(α)(2), cneck here 🕨 📖 and enter "N/A" on line 1.					
	Date of ruling or determination letter: (attach copy of letter if necessary-see instructions)					
t	b Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕨 📖 and enter 1%	1			<u> 1</u>	<u>59.</u>
	of Part I, line 27b					
	c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)					_
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2				0.
3	Add lines 1 and 2	3			1	<u>59.</u>
4	(,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	4				<u>0.</u>
5	,	5			1	<u>59.</u>
	Credits/Payments:					
	a 2009 estimated tax payments and 2008 overpayment credited to 2009  6a 820	4				
	Exempt foreign organizations - tax withheld at source	-				
	c Tax paid with application for extension of time to file (Form 8868)	-				
	d Backup withholding erroneously withheld	-			_	~ ~
	Total credits and payments. Add lines 6a through 6d	7			8	<u> 20.</u>
8	——————————————————————————————————————	8				
9	·	9				<u>- 1</u>
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10			<u> </u>	<u>61.</u>
	Enter the amount of line 10 to be: Credited to 2010 estimated tax   art VII-A Statements Regarding Activities	11				0.
				$\neg$	Vac	No
18	a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or interven	e m	-		163	X
	any political campaign?  Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?		<u> </u>	a b		X
		ad ar	-	<u> </u>		^
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published distributed by the foundation in connection with the activities.	su or				ĺ
	Did the foundation file Form 1120-POL for this year?		١,	ا ؞ا		х
	I Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:		-	C		
	(1) On the foundation. $\triangleright$ \$ (2) On foundation managers. $\triangleright$ \$ 0					ĺ
	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation	<u>.</u>				İ
•	managers. > \$ 0.					ĺ
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?			2		х
•	If "Yes," attach a detailed description of the activities.			i		
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation,	or				1
·	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes			3		x
4a	a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4	а		Х
	of "Yes," has it filed a tax return on Form 990-T for this year?	N,	/A 4	b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?			5		Х
	If "Yes," attach the statement required by General Instruction T.					
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:					Ì
	By language in the governing instrument, or					Ì
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state.	ie law				Ì
	remain in the governing instrument?			6	X.	l
7	Did the foundation have at least \$5,000 in assets at any time during the year?			7	Х	
	If "Yes," complete Part II, col. (c), and Part XV.					Ì
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)   None					
b	o If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)				į	
	of each state as required by General Instruction G? If "No," attach explanation		8_	b	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 call	endar				
	year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV			9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses			0		X

orm 990-PF (2009) The Merrill Foundation, Inc.  Part VII-A Statements Regarding Activities (continued)	39-189	2801	<u>F</u>	Page 5
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of		1 -1	i	
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		· · ·	1	
August 17, 2008?		12		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?		13	Х	
Website address None				
	e no. <b>▶</b> <u>(414)</u>	291-8	26	0
Located at ▶400 E. Wisconsin Avenue, Suite 300, Milwaukee,	<b>WI</b> ZIP+4 ▶5	3202		
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/	Α	
Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required		<del></del>		
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			es	No
1a During the year did the foundation (either directly or indirectly):				
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes X No			
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)				
a disqualified person?	Yes X No		ŀ	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No		1	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes X No			
(5) Transfer any income or assets to a disqualified person (or make any of either available				
for the benefit or use of a disqualified person)?	Yes X No		1	
(6) Agree to pay money or property to a government official? (Exception. Check "No"				
if the foundation agreed to make a grant to or to employ the official for a period after				
termination of government service, if terminating within 90 days.)	Yes X 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)?	N/A	1b		
Organizations relying on a current notice regarding disaster assistance check here	▶∟			
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not correct	ed			
before the first day of the tax year beginning in 2009?		1c		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating found defined in section 4942(j)(3) or 4942(j)(5)):	ation			
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) be				
before 2009?	Yes X No			
If "Yes," list the years - ,, ,, ,, ,, ,, ,,				
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 inc			1	
valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and				
statement - see instructions.)	N/A	2b		
c If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here.				
<u> </u>			1	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			ł	
during the year?	Yes X No			
b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persi				
May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7				
of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Scheo				
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		<u> </u>
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable p	urpose that		-	_
had not been removed from jegnardy before the first day of the tay year beginning in 20092		1.46	1	v

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?  b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?  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) Combutuons to employee benefit plans and deterred and deterred and deterred compensation (If not paid, enter -0-)	Form 990-PF (2009) The Merrill Foundation,  Port VI B Statements Benedic Activities for Which	Inc.	Doguired	<u>39-18928</u>	<u>01</u>	Page 6
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 495(s))*  (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter regislation forme?  (3) Provide a grant to an individual for travel, study, or other similar purposes?  (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?  (5) Provide for any purpose other than religious, charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?  (6) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  (7) If any answer is "Yes to 5a(1)-(5), did any of the transactions fall to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance check here  (a) If "Yes," attach the statement required by Regulations section 53.4945-5(d)  (a) If "Yes," attach the statement required by Regulations section 53.4945-5(d)  (b) If the foundation, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  (b) If the foundation during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  (a) If "Yes," at 6b, file Form 8870  7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  (b) If the foundation and the foundation of the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract?  (a) Name and address foundation managers and their compensation.  (b) Tite, and average in the foundation described in the foundation described in the foundation described in the foundation described in the foundation described in the foundation described in the foundation described in the foundation described in the foundation described in the		rorm 4/20 May Be	requirea (contin	ued)		т —
Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?   Yes   X   No	- · ·	- 4045(-)\Q	<b></b>	<b>₽</b>		
any voter registration drive?  (3) Provide a grant to an individual for travel, study, or other similar purposes?  (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?  (5) Provide a grant to an organization other than a charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  It is any answer is "Yes" to 5a(1)-(5), did any of the transactions fall to quality under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here  of 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				S LAL NO		
(3) Provide a grant to an individual for travel, study, or other similar purposes?  (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(4)(1), (2), or (3), or section 494(d)(2)?  (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  b If any answer is "Yes" to 56(1)-(5), did any of the transactions fail to quality under the exceptions described in Regulations section 53,4945 or in a current notice regarding dissater assistance cleek here  c If the answer is "Yes" to question 52(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?  N/A Yes No  1 Y'es X No  1 Yes X No  1 Yes X No  2 At a that her statement required by Regulations section 53,4945-5(d)  8a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  If "Yes" to 6b, file Form 8870  7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  b If yes, did the foundation About Officers, Directors, Trustees, Foundation Managers, Highly  Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly  Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly  See Statement 6  0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		or to carry on, offectly of indi-		. VI.		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 490(d)(2)?  (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  If lary answer is "Yes" to Sa(1)-(5), did any of the transactions fail to quality under the exceptions described in Regulations section 53,4945 or in a current notice regarding disaster assistance clear here.  If the answer is "Yes" to question Sa(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?  If "Yes," attach the statement required by Regulations section 53,4945-5(d)  Sa Did the foundation, during the year, eceive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  If "Yes" to 6b, file Form 8870  If "Yes to be, file Form 8870  If "Yes," did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  If "Yes to be, file Form 8870  If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?  Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors  List all officers, directors, trustees, foundation managers and their compensation.  (a) Name and address  (b) Title, and average hours per week devoled to position (c) Compensation (d) Compensation account, of allowance week devoled to position (d) Compensation (e)	•		_			
Solicion (1), (2), or (3), or section 4940(d)(2)?   Solicion (3), or section 4940(d)(2)?   Solicion (3), or section 4940(d)(2)?   Solicion (3), or section 4940(d)(2)?   Solicion (3), or section 4940(d)(2)?   Solicion (3), or section 4940(d)(2)?   Solicion (3), or section 4940(d)(2)?   Solicion (3), or section 4940(d)(2)?   Solicion (3), or section 4940(d)(2)?   Solicion (3), or section 4940(d)(2)?   Solicion (3), or section 4940(d)(2)?   Solicion (3), or section 4940(d)(2)?   Solicion (3), or section 4940(d)(2)?   Solicion (3), or section 4940(d)(2)?   Solicion (3), or section 4940(d)(2)?   Solicion (3), or section 4940(d)(2)?   Solicion (4), or section 4940(d)(4), or section 5940(d)(4), or section 59			TI	ON LAL 85		
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelly to children or animals?  If yes were in Yes' to Salf (1)-(5), did any of the transactions fail to quality under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here or 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?  If Yes, attach the statement required by Regulations section 53.4945-5(d)  Sal Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  If Yes is ob, file Form 8870  7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Part VIII  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 devoled (c) Compensation (d) Compensation (e) Expension allowance (e) Compensation (d) Compensation (e) Compensation (e) Compensation (e) Compensation (e) Compensation (e) Compensation (e) Compensation (e) Compensation (e) Compensation (e) Expension (e) Compensation (e) Comp		on described in Section		[ <del>V</del> ] ,		
the prevention of cruelty to children or animals?  b If any answer is "Yes" to 56(1)-(5), did any of the transactions fail to quality under the exceptions described in Regulations section 53,4945 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here  c If the answer is "Yes" to question 58(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?  If "Yes," attach the statement required by Regulations section 53,4945-5(d)  8a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  If "Yes" to 6b, file Form 8870  7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly  1 List all officers, directors, trustees, foundation managers and their compensation.  (a) Name and address  (b) Title, and average hours per week devolved to position  (c) Compensation  (d) Compensation  (d) Compensation  (d) Compensation  (e) Expensions  (a) Name and address of each employee paid more than \$50,000  (b) Title, and average hours per week devolved compensation  (c) Compensation  (d) Compensation  (e) Expensions  (e) Expensions  (f) Compensation  (d) Compensation  (e) Expensions  (f) Compensation  (g) Co	• • • • • • • • • • • • • • • • • • • •	or adventional aurageon or		S LALINO		
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)?  Organizations relying on a current notice regarding disaster assistance theck here  or 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?  If "Yes, "attach the statement required by Regulations section 53.4945-5(d)  8a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  If "Yes attach the statement required by Regulations section 53.4945-5(d)  8a Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  If "Yes fo 6b, file Form 8870  7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors  List all officers, directors, trustees, foundation managers and their compensation.  (a) Name and address  (b) Title, and average hours per week devoted former of the highest-paid employees (other than those included on line 1). If none, enter "NONE."  Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."  Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."  Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."  Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."  (c) Compensation of five highest-paid employee paid more than \$50,000  Did the foundation receive any proceeds or have any not not not part to the transaction?  (d) Compensation of five highest-paid employees (other than those included on line 1). If n	• • • • • • • • • • • • • • • • • • • •	, or educational purposes, or		. V Na	ļ	
section 53.4945 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here  of if the answer is "Yes" to quisition 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?  N/A Yes No  N/A Yes No  Ba Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  b If yes, did the foundation are year, pay premiums, directly or indirectly, on a personal benefit contract?  If "Yes" to 6b, file Form 8870  The At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?  Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors  List all officers, directors, trustees, foundation managers and their compensation.  (a) Name and address  (b) Title, and average hours per week devoted compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."  2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."  (c) Compensation (C) Compensation of the highest-paid employees (other than those included on line 1). If none, enter "NONE."  (d) Combestions to the compensation of the highest-paid employee paid more than \$50,000 (c) Compensation of the highest-paid employees and deferted compensation additional account, of all deferted to position of the paid deferted to position and deferted to position account.	•	dor the eventions described		S LALINU		
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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					30	+
expenditure responsibility for the grant?  If "Yes," attach the statement required by Regulations section 53.4945-5(d) 6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  If "Yes' to 6b, file Form 8870  7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?  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.  (b) Title, and average hours per week devoiced to position  (finet paid, enter-0-)  See Statement 6  0 0 0 (C)  Compensation (G) Computation behave been the paid, enter-0-)  See Statement 6  Compensation (G) Computation (G) Computation behave been been account, off allowance 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 for the paid, enter-0-)  Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."  (b) Title, and average hours per week for the paid, enter-0-)  (c) Compensation (G) Compensa			ainad			1
If "Yes," attach the statement required by Regulations section 53.4945-5(c) 8a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  B Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  If "Yes" to 6b, file Form 8870  7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Information About Officers, Directors, Trustees, Foundation Managers, Highly  Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly  Part VIII   Information About Officers, Directors, Trustees, Foundation Managers, Highly  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 of five highest-paid employees (other than those included on line 1). If none, enter "NONE."  2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."  (c) Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."  (d) Combinates to the proper the file of the proper the pair and deterring compensation of five highest-paid employees account, oil account				,		
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a personal benefit contract?  b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  If "Yes" to 6b, file Form 8870  7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?  Part VIII 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-)  See Statement 6  0 . 0 . (c)  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 (c) Compensation (d) Compensation (d) Compensation (d) Compensation (d) Compensation (d) Compensation (d) Compensation (d) Compensation (d) Compensation (d) Compensation (e) Compensation (d) Compensation (d) Compensation (d) Compensation (d) Compensation (e) Compe		• •				
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  If "Yes" to 6b, file Form 8870  7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  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  (a) Name and address  (b) Title, and average hours per week devoted to position  (c) Compensation  (fine to paid, enter -0-)  (c) Compensation  (d) Combutuons to enter them second allowance of the proper benefit pains account, of allowance of the position 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 of the proper benefit pains and deferred compensation.  (c) Compensation  (d) Combutuons to enter "NONE."  (e) Expension and address of each employee paid more than \$50,000  (b) Title, and average hours per week devoted to position of the proper benefit pains and deferred compensation.		pay premiums on		. <del>.</del> .		1
## 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?  **Bit yes, did the foundation receive any proceeds or have any net income attributable to the transaction?  **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**  **(a) Name and address**  **(a) Name and address**  **(a) Name and address**  **(b) Title, and average hours provided to position**  **(c) Compensation (if not paid, enter -0-)**  **(d) Compensation (if not paid, enter -0-)**  **(a) Name and address of each 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)	·	nornanal hanafit aantraat?			e b	x
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  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  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) Combubants account, other accounts of the paid to provide the paid to position (d) Compensation (d) Combubants account, other accounts of the paid to position (d) Combubants and deterred to position (d) Combubants and deterred to position (e) Compensation (d) Combubants and deterred to position (e) Compensation (e) Expension (e) Expension account, other accounts of the paid to position (e) Compensation (e) Compensation (e) Expension account, other accounts of the paid to position (e) Compensation (e		personal benefit contract?		<u> </u>	50	+≏
Description   Part VIII   Information About Officers, Directors, Trustees, Foundation Managers, Highly   Paid Employees, and Contractors	•	chaltar transaction?		. V .		
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 ((d) Contributions to employee health plans adderred compensation ((e) Expension adderred compensation ((f) not paid, enter -0-) ((f) not				_ · · <del>  -</del>	7h	
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 (if not paid, enter -0-) (c) Compensation (if not paid, enter -0-) (d) Cantibutions to employee benefit plans account, of allowance  See Statement 6  0. 0. 0. (d) Contributions to employee account, of allowance  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 account, of allowance and deferred account, of allowance compensation account, of allowance compensation account, of allowance compensation account, of allowance compensation account, of allowance compensation account, of allowance compensation account, of allowance compensation account, of allowance compensation account, of allowance compensation account, of allowance compensation account, of allowance compensation account, of allowance compensation compensation compensation account, of allowance compensation compe	Information About Officers Directors Truck		anagers Highly		/ 0	
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 (In not paid, enter -0-)  (d) Combensation (In not paid, enter -0-)  (e) Expensacion, old allowance  (a) Name and address  (b) Title, and average hours per week devoted to position  (c) Compensation  (d) Contributions to employee heaft plans account, old allowance  (e) Expensacion  (d) Contributions to employee heaft plans account, old allowance  (e) Expensacion  (b) Title, and average hours per week devoted to position  (c) Compensation  (d) Contributions to employee heaft plans account, old allowance  (e) Expensacion  (b) Title, and average hours per week devoted to position  (d) Contributions to employee heaft plans and detered account, old allowance  (c) Compensation  (d) Contributions to employee heaft plans and detered account, old allowance	Part VIII Paid Employees, and Contractors	ees, i oundation in	anagers, mgm	•		
See Statement 6  O. O. (  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 hours per week devoted to position	<u> </u>	compensation.				
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See Statement 6  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 pendin plans and defarred and defarre	(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	and deferred compensation	accoun	it, other ances
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 allowance.						
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 allowance.		1			1	
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 ald deferred compensation allowance.	See Statement 6	1	0.	٥.	1	0.
(a) Name and address of each employee paid more than \$50,000  (b) Title, and average hours per week devoted to position  (c) Compensation and deterring plans account, off and deterring compensation of allowance.						
(a) Name and address of each employee paid more than \$50,000  (b) Title, and average hours per week devoted to position  (c) Compensation and deterring plans account, off and deterring compensation employee benefit plans account, off allowance.		1				
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(a) Name and address of each employee paid more than \$50,000  (b) Title, and average hours per week devoted to position  (c) Compensation and deterring plans account, off and deterring compensation employee benefit plans account, off allowance.		]				
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(a) Name and address of each employee paid more than \$50,000  (b) Title, and average hours per week devoted to position  (c) Compensation and deterring plans account, off and deterring compensation of allowance.		1			<u> </u>	
devoted to position compensation allowance	2 Compensation of five highest-paid employees (other than those inc		enter "NONE."			
devoted to position compensation allowance	(a) Name and address of each amployee hald more than \$50,000	(b) Title, and average	(a) Componentian	employee benefit plans	(e) Ex	pense
NONE	(a) Marile and address of each employee paid more than \$50,000		(C) Compensation		allow	ances
	NONE			·		
			1			
			1			
		1				
		1				
			1			
		1				
		1				
Total number of other employees paid over \$50,000	Total number of other employees paid over \$50,000			<b>&gt;</b>		0

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Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)	on Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter "	NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	•	
Total number of others receiving over \$50,000 for professional services		<b>▶</b> 0
Part IX-A Summary of Direct Charitable Activities		<del></del>
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistica number of organizations and other beneficiaries served, conferences convened, research papers product	al information such as the led, etc.	Expenses
1 <u>N/A</u>		
2		.,,
3		
4		
Part IX-B Summary of Program-Related Investments  Describe the two largest program-related investments made by the foundation during the tax year on lin	es 1 and 2.	Amount
1 <u>N/A</u>		
		0
2		0.
All other program-related investments. See instructions.  3		
Total, Add lines 1 through 3	<b>&gt;</b>	0.

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign fou	ndations	s. see instructions )
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:	П	
а	Average monthly fair market value of securities	1a	860.454.
	Average of monthly cash balances	1b	860,454. 324,467.
	Fair market value of all other assets	1c .	
	Total (add lines 1a, b, and c)	1d	1,184,921.
	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	1 2	0.
3	Subtract line 2 from line 1d	3	1,184,921.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	17,774.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,167,147.
6	Minimum investment return. Enter 5% of line 5	6	58,357.
P	part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here and do not complete this part.)	ıd certaın	
1	Minimum investment return from Part X, line 6	1	58,357.
2a	Tax on investment income for 2009 from Part VI, line 5		
b	Income tax for 2009. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	159.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	58,198.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	58,198.
6	Deduction from distributable amount (see instructions)	6	Ō.
7_	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	58,198.
P	art 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	96,912.
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)	3ь	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	96,912.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	96,912.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation (	qualifies f	or the section

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## Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI,	_			
line 7				_58,198.
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 52,532.				
<b>b</b> From 2005 231,977.				
c From 2006 148,817.				
d From 2007 238, 449.		'		•
e From 2008 125,241.	707 016			
f Total of lines 3a through e	797,016.			<u> </u>
4 Qualifying distributions for 2009 from				
Part XII, line 4: ► \$ 96,912.			_	
a Applied to 2008, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior		0		
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus	0.			
(Election required - see instructions)	0.	·		E0 100
d Applied to 2009 distributable amount	20 714			58,198.
e Remaining amount distributed out of corpus	38,714.			0.
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.		<del></del> .	
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	835,730.			
<b>b</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	52,532.			
9 Excess distributions carryover to 2010	T02 100			
Subtract lines 7 and 8 from line 6a	783,198.	<del></del>		
10 Analysis of line 9:				
a Excess from 2005 231,977.				
b Excess from 2006 148,817.				
c Excess from 2007 238, 449.				
d Excess from 2008 125,241. e Excess from 2009 38,714.				
e Excess from 2009 38,714.	<u> </u>			Form <b>990-PF</b> (2009)

	rill Founda				392801 Page
Part XIV Private Operating F				N/A	
1 a If the foundation has received a ruling of			ļ		
foundation, and the ruling is effective for	r 2009, enter the date of	the ruling	▶ └	<del> </del>	
<b>b</b> Check box to indicate whether the found		ng foundation described		4942(j)(3) or4	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years	T	
income from Part I or the minimum	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
investment return from Part X for					
each year listed					
<b>b</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	<u> </u>				
e Qualifying distributions made directly					
for active conduct of exempt activities.					
Subtract line 2d from line 2c 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>b</b> "Endowment" alternative test - enter	<del></del>		<del></del>	<del></del>	<del></del>
2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public					
and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(III)					
(3) Largest amount of support from					
an exempt organization					
(4) Gross investment income					I
Part XV Supplementary Info			if the foundation	n had \$5,000 or m	ore in assets
at any time during t	ne year-see the	instructions.)	<del></del>		
1 Information Regarding Foundatio	_				
a List any managers of the foundation who year (but only if they have contributed m			ntributions received by th	e foundation before the clo	se of any tax
Marion Merrill Chest	er Read				
b List any managers of the foundation who other entity) of which the foundation has			o (or an equally large port	ion of the ownership of a p	artnership or
None	·- <del></del>				
2 Information Regarding Contributi Check here ► X if the foundation of				not accept unsolicited requ	uests for funds. If
the foundation makes gifts, grants, etc. (	(see instructions) to indi	viduals or organizations	under other conditions, o	complete items 2a, b, c, an	d d
a The name, address, and telephone number	ber of the person to who	m applications should b	e addressed:		
<b>b</b> The form in which applications should b	e submitted and informa	tion and materials they	should include:		
c Any submission deadlines:					
d Any restrictions or limitations on awards	s, such as by geographic	al areas, charitable field	s, kinds of institutions, or	other factors:	

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

Enter gross amounts unless otherwise indicated.	Unrelate	ed business income		ided by section 512, 513, or 514	(e)
Enter groot amounts amount out of missing.	(a) Business	(b)	(c) Exclu-	(d)	Related or exempt
1 Program service revenue:	Code	Amount	sion	Amount	function income
a	-				
b			_		
c					
d					
e					
f					
g Fees and contracts from government agencies		-			
2 Membership dues and assessments					· · · · · · · · · · · · · · · · · · ·
3 Interest on savings and temporary cash			İ		
investments					
4 Dividends and interest from securities			14	13,879.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal			l		
property					
7 Other investment income					
8 Gain or (loss) from sales of assets other			<u> </u>		
than inventory			18	-12,972.	
9 Net income or (loss) from special events			10	12,712.	
10 Gross profit or (loss) from sales of inventory					<del></del>
11 Other revenue:			ļ. <u></u>		
a					·
C					
d					
e		0.		907	0.
13 Total Add line 12, columns (b), (d), and (e)		<u> </u>	L		907.
(See worksheet in line 13 instructions to verify calculations.)				10	207.
Part XVI-B Relationship of Activities to	tne Acc	omplishment of Ex	emp	t Purposes	
Line No. Explain below how each activity for which incom	e is reported	ın column (e) of Part XVI-A	contrib	outed importantly to the accord	plishment of
▼ the foundation's exempt purposes (other than b)	y providing fu	nds for such purposes).			
N/A					
		<del>.</del>			
				· ·	<del> </del>
				··	
			-		
				<del> </del>	
					- <del></del>
		<del></del>		·	
923821 02-02-10	<del></del>				Form <b>990-PF</b> (2009)

Wisconsin Securities Partners

WI 53202

Milwaukee.

Wisconsin Avenue, Suite 300

414-291-8260 Form **990-PF** (2009)

employed >

EIN ▶

Phone no.

signature

Firm's name (or yours

if self-employed). address, and ZIP code

Continuation for 990-PF, Part IV 39-1892801 Page 1 of 3 The Merrill Foundation, Inc.

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 (b) How acquired (c) Date acquired (d) Date sold

(a) List an 2-story b	d describe the kind(s) of property solorick warehouse: or common stock, 20	d, e.g., real estate, 00 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (d) (mo., day, yr.) (mo.	Date sold , day, yr.)		
1a 48.000 Bellson	th Corp AT&T 4,7		12/16/0811/	17/09			
b 10 sh First S				10/03/0803/			
	Solar Inc		<del></del>	10/27/0803/			
	Solar Inc		P	02/20/0903/			
	Solar Inc		P	07/29/0912/			
	ch & Payne		P	08/11/0803/			
	ch & Payne	-	P	08/11/0803/	27/09		
	ch & Payne		P	09/16/0804/	13/09		
	ch & Payne		P	09/16/0803/	27/09		
	.ch & Payne		P	01/28/0904/	13/09		
k 250 sh Jacobs	Engineering Grou	p Inc	P	08/12/0804/	14/09		
90 sh Pharmac	ceutical Prod Dev	Inc	P	04/22/0907/	14/09		
m 150 sh Pharmac	ceutical Prod Dev	Inc	P	04/22/0907/	15/09		
n 130 sh Pharmac	ceutical Prod Dev	Inc	P	04/22/0907/	16/09		
0 130 sh Pharmac	eutical Prod Dev	Inc	P	04/22/0907/	16/09		
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		Gain or (loss) lus (f) minus (g)			
a 51,489.		46,835.		4	,654.		
b 1,186.		1,911.			-725.		
c 21,341.		20,990.			351.		
d 8,299.		8,893.			-594.		
e 24,324.		30,730.			,406.		
f 1,452.		3,137.		-1	<u>,685.</u>		
g 5,874.		12,547.		-6	<u>,673.</u>		
h 2,002.		3,118.		-1	<u>,116.</u>		
1,958.		3,563.		-1	,605.		
4,003.		3,465.			<u>538.</u>		
k 10,851.		17,744.		-6	<u>,893.</u>		
1,960.		1,689.			271.		
m 3,125.	•	2,816.		309.			
n 2,801.		2,419.	<del>.</del> .	382			
0 2,801.		2,440.			<u>361.</u>		
Complete only for assets show	ng gain in column (h) and owned by t	· · · · · · · · · · · · · · · · · · ·		ses (from col. (h))			
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		Gains (excess of col. (h) gain over col. (k), but not less than "-0-")			
<u>a</u>					<u>,654.</u>		
<u>b</u>					<u>-725.</u>		
C					351.		
<u>d</u>					<u>-594.</u>		
<u>e</u>					,406.		
<u>f</u>		<u> </u>			,685.		
9					<u>,673.</u>		
<u>h</u>					,116.		
1				-1	<u>,605.</u>		
			<del> </del>		538.		
<u>k</u>					<u>,893.</u>		
<u> </u>					271.		
<u>m</u>					309.		
<u>n</u>					382.		
0		L	· 1· -	<del></del>	361.		
2 Capital gain net income or (net c	apital loss) { if gain, also enter if (loss), enter *-0	in Part I, line 7 )-" in Part I, line 7	2				
3 Net short-term capital gain or (lo If gain, also enter in Part I, line 8,	ss) as defined in sections 1222(5) an	, I					
If (loss), enter "-0-" in Part I, line		J_	3				

The Merrill Foundation, Inc. 39-1892801 Page Part IV | Capital Gains and Losses for Tax on Investment Income (b) How acquired (c) Date acquired (a) List and describe the kind(s) of property sold, e.g., real estate, (d) Date sold P - Purchase D - Donation 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo., day, yr.) (mo., day, yr.) 10/12/0408/27/09 12 210 sh Fastenal Co P P 10/12/0407/29/09 50 sh Fastenal P 10 sh Fastenal 10/12/04|07/09/09 Co P 10/12/0407/09/09 380 sh Fastenal P 10/12/04|08/28/09 e 230 sh Fastenal Co P 09/21/0604/20/09 f 290 sh Helmerich & Payne P |09/21/06|11/18/09 g 490 sh Helmerich & Payne P 09/21/0604/13/09 90 sh Helmerich & Payne P 190 sh Helmerich & Payne |09/28/09|04/13/09 P 06/29/07|04/13/09 10 sh Helmerich & Payne sh Jacobs Engineering Group Inc P 01/24/03|04/20/09 k 240 P 01/24/0304/14/09 sh Jacobs Engineering Group Inc 40 P |04/18/07|07/14/09 sh Pharmaceutical Prod Dev Inc 70 P |04/18/07|07/10/09 n 180 sh Pharmaceutical Prod Dev Inc o 150 sh Pharmaceutical Prod Dev P 05/01/07|07/10/09 (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss) (e) Gross sales price plus expense of sale (e) plus (f) minus (g) (or allowable) 2,279. 7.730. 5,451. a 770 1,298. 472. b 260. 46. 306. C 11,622. 10,253. 1,369. d 8,409. 5,970. 2,439. е 6,566. 2,583. 9,149. <u>11,0</u>94. 7<u>,607.</u> 18,701 g 2,038. 535. 2,573. h 4,332. 5,433. 1,101. 286. 356. -70. 447. 5,989. 10,436 741. 995. 1.736. 1 2,391. -867. 1,524. m -2,297.3,851, 6,148. Π -2,069. 3,209. 5,278. 0\_ Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (j) Adjusted basis (k) Excess of col. (i) (i) F.M.V. as of 12/31/69 but not less than "-0-") as of 12/31/69 over col. (1), if any 2,279. a 472. b 46. C 1,369. d 2,439. е 2,583. 7,607. g 535. h 1,101. -70. 5.989. k 995. 1 -867. m -2,297. Π -2,069. 0 { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 } 2 Capital gain net income or (net capital loss) 2

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

Capital Gains and Lo	isses for Tax on Investment Income				
(a) List and 2-story b	d describe the kind(s) of property sole rick warehouse: or common stock, 20	d, e.g., real estate, 00 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a 180 sh Pharmac	eutical Prod Dev	Inc	P	06/29/07	07/09/09
b 120 sh Pharmac	eutical Prod Dev	Inc	P	06/29/07	07/10/09
	Rowe Group Inc		P		01/16/09
	Rowe Group Inc		P	03/13/07	01/20/09
e 100 sh Price T	Rowe Group Inc		P	03/13/07	01/16/09
f					
<u>g</u>				_	
h					
1	<u> </u>				
. <u>L</u>			<del>-</del>		
<u>k</u>					
<u> </u>					
m	<del></del>	<del></del>	<del></del>		
n	<del></del>				
0				<u></u>	<u> </u>
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		Gain or (loss) lus (f) minus (g)	
a 3,774.		6,907.			<u>-3,133.</u>
b 2,567.		4,604.			-2,037.
c 4,342.		6,941.			-2,599.
d 7,512.		12,263.	<del></del>		-4,751.
e 2,895.		4,628.		· · · · · · · · · · · · · · · · · · ·	-1,733.
<u>f</u>					
9					
h					
1			<u> </u>		
			·····		
<u>k</u>					
<u>m</u>		-			
<u>n</u>					
Complete only for assets shown	ı ng gaın ın column (h) and owned by t	the foundation on 12/31/69	(I) I os	ses (from col. (h))	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	Gains (excess of	of col. (h) gain over ot less than "-0-")	
<u> </u>		(1)		<del>-</del> .	-3,133.
ab	·				$\frac{3,133.}{-2,037.}$
С					-2,599.
d				<del></del>	-4,751.
e			-		-1,733.
f					
g					
h			•		
1					
1					
k					
1					
m					
n					
0					
	. If goin also enter	in Part I line 7			
2 Capital gain net income or (net ca	apital loss) { If gain, also enter If (loss), enter "-0	-" in Part I, line 7	2		<u>-12,972.</u>
3 Net short-term capital gain or (los	ss) as defined in sections 1222(5) and				
If gain, also enter in Part I, line 8,	column (c).	}			
If (loss), enter "-0-" in Part I, line 8	3	J	3	N/A	

Form 990-PF Divider	nds and	Inter	est from	n Secu	rities	Statement	1
Source		Gross	Amount		ital Gains ividends	Column (A Amount	.)
Less Accrued Interest Provident Trust Company			-226 14,105		0.	-2 14,1	26. 05.
Total to Fm 990-PF, Part I,	ln 4		13,879	 	0.	13,8	79.
Form 990-PF	Other	Profes	sional 1	ees		Statement	2
Description	Expe	a) enses Books	(b) Net Inv ment In	rest-	(c) Adjusted Net Incom		
Investment Mgmt & Custodial Fees		5,925.	į	5,925.			0.
To Form 990-PF, Pg 1, ln 160		5,925.		5,925.			0.
Form 990-PF	0	ther E	xpenses			Statement	3
Description	Expe		(b) Net Inv	rest-	(c) Adjusted Net Incom		
Annual Filing Fee		10.		10.			0.
To Form 990-PF, Pg 1, ln 23		10.		10.			0.
Form 990-PF	Со	rporat	e Stock			Statement	4
Description				Во	ok Value	Fair Marke Value	t
Jacobs Engr Group Express Scripts Inc Fastenal Company Heartland Express Inc Schwab Charles Corp Helmerich & Payne Cognizant Tech Solutions C1	A				8,429. 24,513. 7,787. 15,249. 52,412. 0. 105,448.	19,9 84,6 12,4 16,2 62,6	92. 92. 78. 71.

The Merrill Foundation, Inc.		39-1892801
Infosys Technologies Ltd Adr	81,728.	98,381.
Pharmaceutical Products Development Inc	Û.	0.
Price T Rowe Group Inc	0.	0.
Devry Inc	62,228.	77,153.
First Solar Inc	0.	0.
Accenture PLC	55,556.	79,265.
Citrix Sytems Inc	37,789.	54,925.
Franklin Resources Inc	51,082.	49,514.
Goldman Sachs Group Inc	56,714.	75,978.
Kohls Corporation	61,651.	77,120.
PNC Financial Services	57,563.	57,541.
TJX Companies Inc	46,602.	56,652.
Visa Inc Class A	60,504.	79,588.
Walgreens Co	55,703.	65,729.
Total to Form 990-PF, Part II, line 10b	840,958.	1,100,729.
Form 990-PF Corporate Bonds		Statement 5
Description	Book Value	Fair Market Value
Bellsouth Corp At&T	0.	0.
Conocophillips 4.75% 02/01/14	41,428.	44,022.
Coca-Cola Co 3.625% 03/15/14	12,941.	13,400.
Hewlett Packard Co 4.75% 06/02/14	42,060.	44,850.
Total to Form 990-PF, Part II, line 10c	96,429.	102,272.

	st of Officers, D d Foundation Mana	Statement 6		
Name and Address	Title and Avrg Hrs/Wk	Compen- sation	Employee Ben Plan Contrib	
Marion Merrill Chester Read 400 E Wisconsin Ave, Suite 300 Milwaukee, WI 53202	President/Dire	ctor 0.	0.	0.
Verne R Read 400 E Wisconsin Ave, Suite 300 Milwaukee, WI 53202	Vice President 0.00	/Director 0.	0.	0.
Alice E Read 400 E Wisconsin Ave, Suite 300 Milwaukee, WI 53202	Secretary/Dire	octor 0.	0.	0.
V Ross Read III 400 E Wisconsin Ave, Suite 300 Milwaukee, WI 53202	Treasurer/Dire 0.00	ctor 0.	0.	0.
J Thomas Collins 400 E Wisconsin Ave, Suite 300 Milwaukee, WI 53202	Assistant Secr 0.00	etary 0.	0.	0.
Alexander R Read 400 E Wisconsin Ave, Suite 300 Milwaukee, WI 53202	Director 0.00	0.	0.	0.
Thomas Merrill Read 400 E Wisconsin Ave, Suite 300 Milwaukee, WI 53202	Director 0.00	0.	0.	0.
Totals included on 990-PF, Page 6	5, Part VIII	0.	0.	0.

Form 990-PF Grants Paid	Statement 7		
Recipient Name and Address	Recipient Relationship and Purpose of Grant	Recipient Status	Amount
1000 Friends of Wisconsin	General Purpose	Public	250.
American Alpine Club	General Purpose	Public	2,000.
Amherst College Annual Fund	General Purpose	Public	500.
Boy Scouts of Milwaukee, Milw Cnty Council	General Purpose	Public	500.
Girl Scouts of the Milwaukee Area-Planned Giving Luncheon	General Purpose	Public	962.
Historic Indian Agency House	General Purpose	Public	10,500.
Institute of Ethnomedicine	General Purpose	Public	2,000.
Lawrence University	General Purpose	Public	5,000.

The Merrill Foundation, Inc.			39-1892801
Milwaukee Symphony Orchestra	General Purpose	Public	2,000.
National Tropical Botanical Garden-Council of Kampong Fellows	General Purpose	Public	1,500.
National Tropical Botanical Garden-Fellow of Limahuli Garden	General Purpose	Public	1,500.
RiverPark Community Church	General Purpose	Public	500.
Seacology	General Purpose	Public	500.
Seacology-Samoa Tsunami Emergency Fund	General Purpose	Public	2,000.
Skylight Opera Theatre	General Purpose	Public	10,000.
St Paul's Church	General Purpose	Public	20,000.
United Performing Arts Fund	General Purpose	Public	1,000.
United Way of Greater Milwaukee	General Purpose	Public	2,500.

The Merrill Foundation, Inc.			39-1892801
University School of Milwaukee Raise the Bar Fund	General Purpose	Public	2,000.
University School of Milwaukee Annual Fund	General Purpose	Public	2,200.
Western Reserve Academy	General Purpose	Public	500.
Wisconsin Conservatory of Music	General Purpose	Public	1,000.
Zoological Society of Milwaukee County	General Purpose	Public	1,500.
American Alpine Journal	General Purpose	Public	500.
Bryn Mawr College Annual Fund	General Purpose	Public	1,000.
Girl Scouts of the Milwaukee Area-Marion C Read Center 1	General Purpose	Public	25,000.
Total to Form 990-PF, Part XV, 15	ine 3a		96,912.