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## Return of Private Foundation

2009

Department of the Treasury  
Internal Revenue Serviceor Section 4947(a)(1) Nonexempt Charitable Trust  
Treated as a Private Foundation

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

For calendar year 2009, or tax year beginning

, and ending

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeUse the IRS  
label.  
Otherwise,  
print  
or type.  
See Specific  
Instructions.

Name of foundation

DR. R.G. RAYMOND & SARAH RAYMOND  
FOUNDATION

Number and street (or P.O. box number if mail is not delivered to street address)

Room/suite

C/O NAT'L EXCH BANK &amp; TRUST 130 S MAIN

City or town, state, and ZIP code

FOND DU LAC, WI 54935

A Employer identification number

39-6051142

B Telephone number

920-923-7000

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test,  
check here and attach computation ☐E If private foundation status was terminated  
under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination  
under section 507(b)(1)(B), check here ☐

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year

(from Part II, col. (c), line 16)

\$ 1,389,317. (Part I, column (d) must be on cash basis)

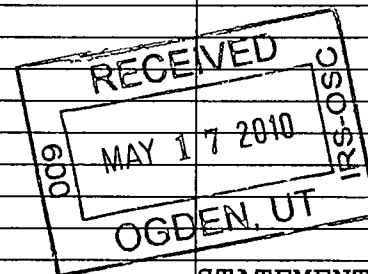
J Accounting method:

☐ Cash☒ Accrual☐ Other (specify)

## Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not  
necessarily equal the amounts in column (a))(a) Revenue and  
expenses per books(b) Net investment  
income(c) Adjusted net  
income(d) Disbursements  
for charitable purposes  
(cash basis only)

Revenue	1	Contributions, gifts, grants, etc., received			N/A	
	2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3	Interest on savings and temporary cash investments	16,492.	16,492.		STATEMENT 1
	4	Dividends and interest from securities	24,455.	24,455.		STATEMENT 2
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	18,370.			
	b	Gross sales price for all assets on line 6a	252,317.			
	7	Capital gain net income (from Part IV, line 2)		18,370.		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold					
c	Gross profit or (loss)					
11	Other income	2,848.	0.		STATEMENT 3	
12	Total. Add lines 1 through 11	62,165.	59,317.			
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	3,278.	818.		2,460.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees	911.	0.		0.
	b	Accounting fees	1,260.	0.		0.
	c	Other professional fees				
	17	Interest				
	18	Taxes	571.	571.		0.
	19	Depreciation and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses	7,753.	7,753.		0.
	24	Total operating and administrative expenses. Add lines 13 through 23	13,773.	9,142.		2,460.
	25	Contributions, gifts, grants paid	70,000.			70,000.
26	Total expenses and disbursements. Add lines 24 and 25	83,773.	9,142.		72,460.	
27	Subtract line 26 from line 12:					
a	Excess of revenue over expenses and disbursements	<21,608.>				
b	Net investment income (if negative, enter -0-)		50,175.			
c	Adjusted net income (if negative, enter -0-)			N/A		



Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing		1.		
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶				
		Less: allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments - U.S. and state government obligations		150,078.		
	b	Investments - corporate stock	STMT 8	914,328.	882,606.	857,401.
	c	Investments - corporate bonds	STMT 9	250,694.	355,578.	371,458.
11	Investments - land, buildings, and equipment basis ▶					
	Less accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other	STMT 10	106,250.	160,458.	160,458.	
14	Land, buildings, and equipment basis ▶					
	Less accumulated depreciation ▶					
15	Other assets (describe ▶ <b>TIMING DIFFERENCES</b> )		<1,101.>	0.	0.	
16	<b>Total assets</b> (to be completed by all filers)		1,420,250.	1,398,642.	1,389,317.	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
	23	<b>Total liabilities</b> (add lines 17 through 22)		0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>					
	and complete lines 24 through 26 and lines 30 and 31					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>					
	and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds		1,007,433.	1,007,433.	
28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.		
29	Retained earnings, accumulated income, endowment, or other funds		412,817.	391,209.		
30	<b>Total net assets or fund balances</b>		1,420,250.	1,398,642.		
31	<b>Total liabilities and net assets/fund balances</b>		1,420,250.	1,398,642.		

## Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,420,250.
2	Enter amount from Part I, line 27a	2	<21,608.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	1,398,642.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	<b>Total net assets or fund balances at end of year</b> (line 4 minus line 5) - Part II, column (b), line 30	6	1,398,642.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a SEE ATTACHED-SHORT TERM SALES</b>	P		
<b>b SEE ATTACHED-LONG TERM SALES</b>	P		
<b>c CAPITAL GAINS DIVIDENDS</b>			
<b>d</b>			
<b>e</b>			

(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)
<b>a 213,978.</b>		<b>203,584.</b>	<b>10,394.</b>
<b>b 36,491.</b>		<b>30,363.</b>	<b>6,128.</b>
<b>c 1,848.</b>			<b>1,848.</b>
<b>d</b>			
<b>e</b>			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) 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	
<b>a</b>			<b>10,394.</b>
<b>b</b>			<b>6,128.</b>
<b>c</b>			<b>1,848.</b>
<b>d</b>			
<b>e</b>			

<b>2</b> Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	<b>2</b>	<b>18,370.</b>
<b>3</b> 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	{ }	<b>3</b>	<b>N/A</b>

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

**1** Enter the appropriate amount in each column for each year; see instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	78,824.	1,380,695.	.057090
2007	79,210.	1,547,156.	.051197
2006	77,710.	1,518,628.	.051171
2005	75,460.	1,456,540.	.051808
2004	74,710.	1,410,549.	.052965

<b>2</b> Total of line 1, column (d)	<b>2</b>	<b>.264231</b>
<b>3</b> 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	<b>3</b>	<b>.052846</b>
<b>4</b> Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	<b>4</b>	<b>1,270,378.</b>
<b>5</b> Multiply line 4 by line 3	<b>5</b>	<b>67,134.</b>
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	<b>502.</b>
<b>7</b> Add lines 5 and 6	<b>7</b>	<b>67,636.</b>
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	<b>72,460.</b>

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	502.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	502.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	502.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a 2,174.	7	2,174.
b Exempt foreign organizations - tax withheld at source	6b	8	
c Tax paid with application for extension of time to file (Form 8868)	6c	9	
d Backup withholding erroneously withheld	6d	10	1,672.
7 Total credits and payments. Add lines 6a through 6d		11	0.
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <input checked="" type="checkbox"/> 1,672. Refunded <input checked="" type="checkbox"/>			

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> WI		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(i)(3) or 4942(i)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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**Part VII-A Statements Regarding Activities** (continued)

11. At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12. Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13. Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14. The books are in care of ► PETER STONE Telephone no. ► 920-921-7700 Located at ► NATIONAL EXCHG BANK & TRUST, FOND DU LAC, WI ZIP+4 ► 54936-0827			
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 ► 15 N/A			

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

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

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

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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:

☐ Yes ☒ No☐ Yes ☒ No☐ Yes ☒ No☐ Yes ☒ No☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

☒

Organizations relying on a current notice regarding disaster assistance check here

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 11		3,278.	0.	0.

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

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

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

0

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**Part VIII****Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

0

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A	
2	
3	
4	

**Part IX-B Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	
	0.
2	
All other program-related investments. See instructions.	
3	
<b>Total.</b> Add lines 1 through 3	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	1,159,471.
b	Average of monthly cash balances	1b	130,253.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,289,724.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,289,724.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	19,346.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,270,378.
6	Minimum investment return. Enter 5% of line 5	6	63,519.

**Part XI** Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	63,519.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	502.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	502.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	63,017.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	63,017.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	63,017.

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	72,460.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	72,460.
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	502.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	71,958.

**Note.** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

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**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
<b>1</b> Distributable amount for 2009 from Part XI, line 7				63,017.
<b>2</b> Undistributed income, if any, as of the end of 2009				
<b>a</b> Enter amount for 2008 only			0.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2009:				
<b>a</b> From 2004	7,150.			
<b>b</b> From 2005	3,908.			
<b>c</b> From 2006	4,528.			
<b>d</b> From 2007	4,407.			
<b>e</b> From 2008	10,561.			
<b>f</b> Total of lines 3a through e	30,554.			
<b>4</b> Qualifying distributions for 2009 from Part XII, line 4: ▶ \$ 72,460.				
<b>a</b> Applied to 2008, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2009 distributable amount				63,017.
<b>e</b> Remaining amount distributed out of corpus	9,443.			
<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))	0.			0.
<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	39,997.			
<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		0.		
<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 instr.			0.	
<b>f</b> Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
<b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7	7,150.			
<b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	32,847.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2005	3,908.			
<b>b</b> Excess from 2006	4,528.			
<b>c</b> Excess from 2007	4,407.			
<b>d</b> Excess from 2008	10,561.			
<b>e</b> Excess from 2009	9,443.			



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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SEE STATEMENT 13				
Total	▶ 3a			70,000.
b Approved for future payment				
NONE				
Total	▶ 3b			0.

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
		14	16,492.	
		14	24,455.	
		18	18,370.	
		25	2,848.	
	0.		62,165.	0.

2009.03050 DR. R.G. RAYMOND & SARAH RA 70970 1



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

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SOURCE	AMOUNT
RG & SARAH RAYMOND AGENCY ACCT	16,492.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	16,492.

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FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
RG & SARAH RAYMOND AGENCY ACCT	26,303.	1,848.	24,455.
TOTAL TO FM 990-PF, PART I, LN 4	26,303.	1,848.	24,455.

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FORM 990-PF OTHER INCOME STATEMENT 3

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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
MISCELLANEOUS	2,848.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	2,848.	0.	

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FORM 990-PF LEGAL FEES STATEMENT 4

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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	911.	0.		0.
TO FM 990-PF, PG 1, LN 16A	911.	0.		0.

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FORM 990-PF	ACCOUNTING FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
TAX PREPARATION	1,260.	0.		0.	
TO FORM 990-PF, PG 1, LN 16B	1,260.	0.		0.	

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES	571.	571.		0.	
TO FORM 990-PF, PG 1, LN 18	571.	571.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FIDUCIARY FEES	7,654.	7,654.		0.	
CONVERSION FEES	99.	99.		0.	
TO FORM 990-PF, PG 1, LN 23	7,753.	7,753.		0.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
350 CHEVRON TEXACO CORP COM	28,288.	26,947.		
1000 MARATHON OIL CORP	25,074.	31,220.		
500 KIMBERLY CLARK CORP	29,071.	31,855.		
400 PEPSICO INC COM	21,331.	24,320.		
1000 BARRICK GOLD CORP	18,873.	39,380.		
1300 BRISTOL MYERS SQUIBB CO COM	32,405.	32,825.		
900 NEWMONT MINING CORP	27,730.	42,579.		



1700 CATO CORP	28,512.	34,102.
650 TIDEWATER INC COM	24,135.	31,168.
1300 PFIZER INC COM	30,093.	23,647.
700 HARRIS CORP DEL COM	31,642.	33,285.
1500 INTEL CORP OCM	28,689.	30,600.
4800 IPASS INC COM	26,187.	4,992.
600 LEXMARK INTL INC NEW CL A	33,210.	15,588.
1100 MICROSOFT CORP COM	30,448.	33,528.
2000 NOKIA CORP SPONSORED ADR	37,504.	25,700.
3000 TELECOM CORP NEW ZEALAND LTD	36,350.	26,970.
1200 VODAFONE GROUP PLC NEW	30,079.	27,708.
700 EMERSON ELEC CO COM	22,769.	29,820.
700 ROCKWELL COLLINS INC COM	32,686.	38,752.
400 3M CO COM	28,252.	33,068.
400 JOHNSON & JOHNSON COM	22,807.	25,764.
750 GANNETT INC COM	36,761.	11,138.
3300 JOURNAL COMMUNICATIONS INC COM	35,419.	12,837.
2300 DRESS BARN INC	34,714.	53,107.
2300 K-SWISS INC	37,522.	22,862.
550 AMGEN INC	31,997.	31,114.
600 ASTRAZENECA PLC SPONSORED ADR	30,364.	28,164.
650 PROGRESS ENERGY INC COM	27,326.	26,657.
550 STRYKER CORP	22,368.	27,704.
TOTAL TO FORM 990-PF, PART II, LINE 10B	882,606.	857,401.

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
NATIONAL RURAL UTILS COOP FIN CORP	50,000.	50,535.
50000 HEWLETT PACKARD CO GLOBAL	50,842.	53,641.
50000 WALMART STORES INC	50,703.	53,787.
50000 BERKSHIRE HATHAWAY FIN CORP SR NT	50,304.	52,755.
50000 GLAXOSMITHKLINE CAP INC GTD NT	48,196.	52,450.
50000 INTERNATIONAL BUSINESS MACHS	54,133.	53,717.
50000 NUCORFF CORP	51,400.	54,573.
TOTAL TO FORM 990-PF, PART II, LINE 10C	355,578.	371,458.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	10
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
BLACKROCK PROVIDENT TEMP FD #24	COST	160,458.	160,458.
TOTAL TO FORM 990-PF, PART II, LINE 13		160,458.	160,458.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	11
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
PETER STONE 130 S MAIN STREET FOND DU LAC, WI 54935	TREASURER 0.75	0.	0.	0.
ROBERT EDGARTON 10 FOREST AVENUE FOND DU LAC, WI 54935	SECRETARY 1.75	800.	0.	0.
JOHN J. TAGLIAPIETRA 415 HIGHLAND AVENUE BROWNSVILLE, WI 53006	ASSISTANT SECRETARY 0.75	830.	0.	0.
DR. LELAND FRIEDRICH 501 HIGHLAND AVENUE BROWNSVILLE, WI 53006	PRESIDENT 0.75	830.	0.	0.
DR. MICHAEL W. BACHHUBER 360 S MOUNTAIN DRIVE MAYVILLE, WI 53050	VICE PRESIDENT 0.75	818.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		3,278.	0.	0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION  
PART XV, LINES 2A THROUGH 2D

STATEMENT 12

## NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

ROBERT V. EDGARTON C/O DR. R.G. & SARAH RAYMOND FOUNDATION, INC.  
10 FOREST AVENUE  
FOND DU LAC, WI 54935

## TELEPHONE NUMBER

920-922-0470

## FORM AND CONTENT OF APPLICATIONS

NO SPECIFICATIONS

## ANY SUBMISSION DEADLINES

NONE

## RESTRICTIONS AND LIMITATIONS ON AWARDS

STATE OF WISCONSIN / PRIMARILY FOND DU LAC & DODGE COUNTIES PURPOSES:  
REHABILITATION, NURSING, RECREATIONAL, CIVIC, RELIGIOUS, OR EDUCATIONAL.

FORM 990-PF

GRANTS AND CONTRIBUTIONS  
PAID DURING THE YEAR

STATEMENT 13

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
BAY LAKES COUNCIL, BOY SCOUTS 2555 NORTHERN ROAD APPLETON, WI 54912	NONE PROMOTE OUTDOOR ACTIVITIES		2,000.
BLANDINE HOUSE 25 N PARK AVENUE FOND DU LAC, WI 54935	NONE REHAB OF HANDICAPPED & NURSING HOME SERVICES		1,500.
BROOKE INDUSTRIES 1257 INDUSTRIAL PARKWAY FOND DU LAC, WI 54937	NONE REHAB OF HANDICAPPED & NURSING HOME SERVICES		2,000.
BROWNSVILLE COMMUNITY CENTER, INC. 871 MAIN STREET BROWNSVILLE, WI 53006	NONE PROMOTE OUTDOOR & RECREATIONAL ACTIVITY		3,000.
BROWNSVILLE LIBRARY 379 MAIN STREET BROWNSVILLE, WI 53006	NONE CIVIC		8,000.
BROWNSVILLE RECREATION DEPT 514 RAILROAD STREET BROWNSVILLE, WI 53006	NONE PROMOTE OUTDOOR ACTIVITIES		5,500.
CHURCH OF PEACE 158 S MILITARY ROAD FOND DU LAC, WI 54935	NONE RELIGIOUS		250.
FIRST BAPTIST CHURCH 326 E MAIN STREET CAMPBELLSPORT, WI 53010	NONE RELIGIOUS		250.

FOND DU LAC BLUE LINE CLUB 550 FOND DU LAC AVENUE FOND DU LAC, WI 54935	NONE PROMOTE OUTDOOR ACTIVITIES	3,000.
FOND DU LAC YMCA 90 W 2ND STREET FOND DU LAC, WI 54935	NONE PROMOTE OUTDOOR ACTIVITIES	2,000.
FOND DU LAC YMCA BUILDING FUND 90 W 2ND STREET FOND DU LAC, WI 54935	NONE PROMOTE OUTDOOR ACTIVITIES	2,000.
LOAVES & FISHES PROGRAM 237 N MACY STREET FOND DU LAC, WI 54935	NONE REHAB OF HANDICAPPED & NURSING HOME SERVICES	3,500.
LOMIRA PUBLIC LIBRARY 1038 MAIN STREET LOMIRA, WI 53048	NONE CIVIC	3,000.
MANITOU GIRL SCOUT COUNCIL 5212 WINDWARD COURT SHEBOYGAN, WI 53083	NONE PROMOTE OUTDOOR ACTIVITIES	2,000.
MARIAN UNIVERSITY 45 S NATIONAL AVENUE FOND DU LAC, WI 54935	NONE EDUCATION	4,000.
MAYVILLE MIDDLE SCHOOL CONSERVATION 234 N JOHN STREET MAYVILLE, WI 53050	NONE EDUCATION	1,000.
MAYVILLE PUBLIC LIBRARY 111 N MAIN STREET MAYVILLE, WI 53050	NONE CIVIC	1,500.
SALVATION ARMY 237 N MACY STREET FOND DU LAC, WI 54935	NONE RELIGIOUS	4,000.

SOLUTIONS CENTER SHELTER & SUPPORT 39 N SOPHIA STREET FOND DU LAC, WI 54935	NONE CIVIC	2,500.
SONS OF ZEBEDEE W5882 CHURCH ROAD FOND DU LAC, WI 54937	NONE RELIGIOUS	250.
SPILLMAN PUBLIC LIBRARY 719 WISCONSIN AVENUE NORTH FOND DU LAC, WI 54937	NONE CIVIC	1,000.
ST. JOHN'S CHURCH 550 WATER STREET LOMIRA, WI 53048	NONE RELIGIOUS	500.
ST. LAWRENCE SEMINARY 301 CHURCH MT CALVARY, WI 53057	NONE EDUCATION	250.
ST. MARY'S CHURCH 699 MILWAUKEE STREET LOMIRA, WI 53048	NONE RELIGIOUS	6,000.
ST. MARY'S SCHOOL 28 NABER STREET MAYVILLE, WI 53050	NONE EDUCATION	250.
ST. MARY'S SPRINGS HIGH SCHOOL 255 CTY ROAD K FOND DU LAC, WI 54935	NONE EDUCATION	4,000.
ST. PAULS CATHEDRAL 51 W DIVISION STREET FOND DU LAC, WI 54935	NONE RELIGIOUS	250.
ST. PAULS CHURCH 605 HIGHLAND STREET BROWNSVILLE, WI 53006	NONE RELIGIOUS	250.

THERESA PUBLIC LIBRARY	NONE	1,000.
290 MAYVILLE STREET THERESA, WI	CIVIC	
53091		
TRINITY METHODIST CHURCH	NONE	250.
300 CHURCH STREET LOMIRA, WI	RELIGIOUS	
53048		
VISTA WEE TON WA UNTKA	NONE	1,000.
N3398 CHAPEL HEIGHTS ROAD	PROMOTE OUTDOOR	
CAMPBELLSPORT, WI 53010	ACTIVITIES	
WINNEBAGO LUTHERAN ACADEMY	NONE	4,000.
475 E MERRILL AVENUE FOND DU	EDUCATION	
LAC, WI 54935		

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

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70,000.

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Dr. R.G. Raymond # Sarah Raymond Foundation

Statement - Short-term and long-term sales

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks, Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
<b>Short Term Sales Reported on 1099-B</b>								
50000.0000	3133F2V77	FEDERAL HOME LN MTG CORP 4.00% DTD 10/30/2008 DUE 10/15/2012	10/29/2008	10/15/2009	50,000.00	49,801.50	198.50	0.00
50000.0000	3128X8CH3	FEDERAL HOME LN MTG CORP MEDIUM TERM NTS 2.00% DTD 12/30/2008 DUE	12/17/2008	06/30/2009	50,000.00	50,000.00	0.00	0.00
50000.0000	3136F9E82	FEDERAL NATL MTG ASSN 4.15% DTD 09/12/2008 DUE 09/12/2011	10/24/2008	01/22/2009	50,000.00	50,000.00	0.00	0.00
8930	41457P106	HARRIS STRATEX NTRKS INC CL A	05/27/2009	06/08/2009	4.37	4.77	-0.40	0.00
173.0000	41457P106	HARRIS STRATEX NTRKS INC CL A	05/27/2009	06/19/2009	1,057.00	923.82	133.18	0.00
500.0000	444859102	HUMANA INC COM	VARIOUS	06/19/2009	15,734.94	22,310.00	-6,575.06	0.00
1000.0000	74144T108	PRICE T ROWE GROUP INC COM	VARIOUS	06/19/2009	41,771.53	25,953.90	15,817.63	0.00
100.0000	74834L100	QUEST DIAGNOSTICS INC COM	11/06/2008	06/24/2009	5,410.05	4,590.00	820.05	0.00
<b>Total Short Term Sales Reported on 1099-B</b>						<b>203,583.99</b>	<b>10,393.91</b>	<b>0.00</b>
<b>Long Term 15% Sales Reported on 1099-B</b>								
300.0000	444859102	HUMANA INC COM	VARIOUS	06/19/2009	9,440.97	3,998.20	5,442.77	0.00
500.0000	74834L100	QUEST DIAGNOSTICS INC COM	VARIOUS	06/24/2009	27,050.26	26,365.00	685.26	0.00
<b>Total Long Term 15% Sales Reported on 1099-B</b>						<b>30,363.20</b>	<b>6,128.02</b>	<b>0.00</b>

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.