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

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Service

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

For calendar year 2009, or tax year beginning , 2009, and ending ,

G Check all that apply ☐ Initial return ☐ Initial Return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Use the IRS label otherwise, print or type See Specific Instructions.	Name of foundation Dorothy Inbusch Foundation, Inc.		A Employer identification number 39-6084238
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number (see the instructions) (414) 271-5900
	City or town	State ZIP code	C If exemption application is pending, check here ☐
	Milwaukee	WI 53202-3877	D 1 Foreign organizations, check here ☐ 2 Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, column (c), line 16) \$ 3,546,960.		J Accounting method ☒ Cash ☐ Accrual Other (specify) _____ (Part I, column (d) must be on cash basis)	
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
REVENUE	1 Contributions, gifts, grants, etc. received (att sch)				
	2 Ck ☒ if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	54,778.	54,778.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10	950.			
	b Gross sales price for all assets on line 6a	950.			
	7 Capital gain net income (from Part IV, line 2)		951.		
	8 Net short-term capital gain				
	9 Income modifications				
ADMINISTRATIVE AND OPERATING EXPENSES	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit/(loss) (att sch)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	55,728.	55,729.		
	13 Compensation of officers, directors, trustees, etc	110,000.	40,000.		70,000.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule) L-16a Stmt	1,375.	344.		1,031.
	b Accounting fees (attach sch)				
	c Other prof fees (attach sch) L-16c Stmt	10,545.	2,636.		909.
	17 Interest	225.			
	18 Taxes (attach schedule) (see instr)	1,936.			
	19 Depreciation (attach sch) and depletion				
20 Occupancy					
21 Travel, conferences, and meetings	2,445.			2,445.	
22 Printing and publications					
23 Other expenses (attach schedule)	1,137.	284.		853.	
24 Total operating and administrative expenses. Add lines 13 through 23	127,663.	43,264.		82,238.	
25 Contributions, gifts, grants paid	178,590.			178,590.	
26 Total expenses and disbursements. Add lines 24 and 25	306,253.	43,264.		260,828.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-250,525.				
b Net investment income (if negative enter -0-)		12,465.			
c Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
A S S E T S	1 Cash – non-interest-bearing			
	2 Savings and temporary cash investments	2,287,833.	656,644.	656,644.
	3 Accounts receivable			
	Less allowance for doubtful accounts			
	4 Pledges receivable			
	Less allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions)			
	7 Other notes and loans receivable (attach sch)	15,000.		
	Less allowance for doubtful accounts	0.	15,000.	15,000.
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments – U.S. and state government obligations (attach schedule)			
	b Investments – corporate stock (attach schedule) L-10b Stmt	516,869.	1,882,533.	2,875,316.
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment basis			
Less accumulated depreciation (attach schedule)				
12 Investments – mortgage loans				
13 Investments – other (attach schedule)				
14 Land, buildings, and equipment basis				
Less accumulated depreciation (attach schedule)				
15 Other assets (describe)				
16 Total assets (to be completed by all filers – see instructions. Also, see page 1, item I)	2,804,702.	2,554,177.	3,546,960.	
L I A B I L I T I E S	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)			
F U N D A S S E T B A L A N C E S	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. X			
	24 Unrestricted	2,804,702.	2,554,177.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see the instructions)	2,804,702.	2,554,177.	
	31 Total liabilities and net assets/fund balances (see the instructions)	2,804,702.	2,554,177.	

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	2,804,702.
2 Enter amount from Part I, line 27a	2	-250,525.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	2,554,177.
5 Decreases not included in line 2 (itemize)	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)– Part II, column (b), line 30	6	2,554,177.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month day year)	(d) Date sold (month, day, year)
1a McVean Form 1099-B Reg. Futures Contracts, Line 11		P	Various	12/31/09
b McVean Form 1099-B Proceeds LCV		P	09/12/02	12/31/09
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 3,419.		0.	3,419.
b 30,371.		32,839.	-2,468.
c			
d			
e			

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

(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
a 0.	0.	0.	3,419.
b			-2,468.
c			
d			
e			

2 Capital gain net income or (net capital loss)	— [If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7]	2	951.
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) (see the instructions) If (loss), enter -0- in Part I, line 8]	3	

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

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

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

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

Yes ☐ No ☒

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2008	242,912.	3,877,145.	0.062652
2007	224,808.	4,163,456.	0.053996
2006	232,900.	3,819,928.	0.060970
2005	251,223.	3,811,003.	0.065920
2004	209,930.	3,676,416.	0.057102

2 Total of line 1, column (d)	2	0.300640
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.060128
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	3,164,086.
5 Multiply line 4 by line 3	5	190,250.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	125.
7 Add lines 5 and 6	7	190,375.
8 Enter qualifying distributions from Part XII, line 4	8	260,828.

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 the instructions)

1 a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter 'N/A' on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary - see instr.)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	125.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	125.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	125.
6 Credits/Payments			
a 2009 estimated tax pmts and 2008 overpayment credited to 2009	6a	1,600.	
b Exempt foreign organizations— tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	1,600.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,475.	
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax <u>500.</u> Refunded	11	975.	

Part VII-A Statements Regarding Activities

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

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Part VII-A Statements Regarding Activities Continued

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>Thomas J. Drought</u> Telephone no <u>(414) 227-1213</u> Located at <u>Cook & Franke S.C., 660 E. Mason St., Milwaukee, WI</u> ZIP + 4 <u>53202-3877</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ☐ and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>			

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6) Agree to pay money or property to a government official? Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days ☐ Yes ☒ No		
b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see the instructions)? Organizations relying on a current notice regarding disaster assistance check here ☐	1b	X
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? ☐ Yes ☒ No If 'Yes,' list the years <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
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 the instructions)	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 <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b If 'Yes,' did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)	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**(1)** Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?☐ Yes ☒ No**(2)** Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?☐ Yes ☒ No**(3)** Provide a grant to an individual for travel, study, or other similar purposes?☐ Yes ☒ No**(4)** Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)☐ Yes ☒ No**(5)** Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?**5b**

Organizations relying on a current notice regarding disaster assistance check here

☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?☐ Yes ☐ No

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

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

If 'Yes' to 6b, file Form 8870

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?**7b****Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Robert E. Cook 660 E. Mason St. Milwaukee WI 53202-3877	President 4.00	25,000.	0.	0.
Thomas J. Drought 660 E. Mason St. Milwaukee WI 53202-3877	Sec/Treas. 4.00	45,000.	0.	0.
Harry F. Franke 660 E. Mason St. Milwaukee WI 53202-3877	Vice Pres. 4.00	20,000.	0.	0.
See Information about Officers, Directors, Trustees, Etc.		20,000.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
None				
0				
0				
0				
0				

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

None

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
None		
Total number of others receiving over \$50,000 for professional services		None

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
	0.
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
	0.
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	None

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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	1,833,436.
b	Average of monthly cash balances	1b	1,369,546.
c	Fair market value of all other assets (see instructions)	1c	9,288.
d	Total (add lines 1a, b, and c)	1d	3,212,270.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	3,212,270.
4	Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	48,184.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,164,086.
6	Minimum investment return. Enter 5% of line 5	6	158,204.

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	158,204.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	125.
b	Income tax for 2009 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	125.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	158,079.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	158,079.
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	158,079.

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	260,828.
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	260,828.
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 (see instructions)	5	125.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	260,703.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				158,079.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years 20__, 20__, 20__				
3 Excess distributions carryover, if any, to 2009				
a From 2004	26,916.			
b From 2005	61,733.			
c From 2006	43,734.			
d From 2007	21,308.			
e From 2008	76,045.			
f Total of lines 3a through e	229,736.			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 260,828.				
a Applied to 2008, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required—see instructions)		0.		
c Treated as distributions out of corpus (Election required—see instructions)	0.			
d Applied to 2009 distributable amount				158,079.
e Remaining amount distributed out of corpus	102,749.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	332,485.			
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 instructions			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) (see instructions)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	26,916.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	305,569.			
10 Analysis of line 9				
a Excess from 2005	61,733.			
b Excess from 2006	43,734.			
c Excess from 2007	21,308.			
d Excess from 2008	76,045.			
e Excess from 2009	102,749.			

N/A

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

Tax year		Prior 3 years		(e) Total
(a) 2009	(b) 2008	(c) 2007	(d) 2006	

(4) Gross investment income

Only 501(c)(3) organizations primarily in the greater Milwaukee, WI area.

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year See attached schedule.	N/A	Public Charities	See attached schedule.	178,590.
Total			3a	178,590.
b Approved for future payment				
Total			3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue					
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 investments					
4 Dividends and interest from securities			14	54,778.	
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 property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			14	950.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				55,728.	
13 Total. Add line 12, columns (b), (d), and (e)				13	55,728.

(See worksheet in the instructions for line 13 to verify calculations)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]

Form 990-PF, Page 6, Part VIII, Line 1

Information about Officers, Directors, Trustees, Etc.

(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
Person ☐ Business ☐ Kathy L. Nusslock 111 E. Kilbourn Avenue, #1400 Milwaukee WI 53202-6677	Director 4.00	20,000.	0.	0.
Person ☐ Business ☐ Cheryll C. Whiteside 660 E. Mason St. Milwaukee WI 53202-3877	Asst. Secy. 2.00	0.	0.	0.

Total

20,000. 0. 0.

Form 990-PF, Page 1, Part I

Line 16a - Legal Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Cook & Franke S.C.	legal	1,375.	344.		1,031.
Total		1,375.	344.		1,031.

Form 990-PF, Page 1, Part I

Line 16c - Other Professional Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Cook & Franke S.C.	Administrative fees	10,545.	2,636.		7,909.
Total		10,545.	2,636.		7,909.

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

L-10b Stmt

Line 10b - Investments - Corporate Stock:	End of Year	
	Book Value	Fair Market Value
AFLAC, Inc. (52,000 shares)	1,531,609.	2,405,000.
Google Inc. Cl A (500 shares)	190,598.	309,990.
McVean Trading & Investments, Inc.	160,326.	160,326.

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

Continued

L-10b Stmt

Line 10b - Investments - Corporate Stock:	End of Year	
	Book Value	Fair Market Value
Total	<u>1,882,533.</u>	<u>2,875,316.</u>

Supporting Statement of:

Form 990-PF, pl/Line 4(b)

Description	Amount
AFLAC Inc.	43,120.
Fidelity Cash Reserves Money Market	8.
Fidelity Institutional Money Market	8,640.
Fidelity Money Market	2,953.
Fidelity Wood Asset Management Account	26.
McVean Tradings & Investments, Inc.	31.
Total	<u>54,778.</u>

Supporting Statement of:

Form 990-PF, pl/Line 13(a)

Description	Amount
Robert E. Cook	25,000.
Harry F. Franke	20,000.
Thomas J. Drought	45,000.
Kathy L. Nusslock	20,000.
Total	<u>110,000.</u>

Supporting Statement of:

Form 990-PF, pl/Line 13(b)

Description	Amount
Robert E. Cook (75% of \$25,000)	18,750.
Harry F. Franke (25% of \$20,000)	5,000.
Thomas J. Drought (25% of \$45,000)	11,250.
Kathy L. Nusslock (25% of \$20,000)	5,000.
Total	<u>40,000.</u>

Supporting Statement of:

Form 990-PF, pl/Line 13(d)

Description	Amount
Robert E. Cook (25% of \$25,000)	6,250.
Harry F. Franke (75% of \$20,000)	15,000.
Thomas J. Drought (75% of \$45,000)	33,750.
Kathy L. Nusslock (75% of \$20,000)	15,000.
Total	<u>70,000.</u>

Supporting Statement of:

Form 990-PF, pl/Line 17(a)

Description	Amount
United States Treasury (2007 amended Form 990-PF)	43.
United States Treasury (2005 amended Form 990-PF)	57.
United States Treasury (2004 amended Form 990-PF)	125.
Total	<u>225.</u>

Supporting Statement of:

Form 990-PF, pl/Line 18(a)-1

Description	Amount
United States Treasury (2007 add'l. excise tax)	842.
United States Treasury (2006 add'l. excise tax)	391.
United States Treasury (2005 add'l. excise tax)	246.
United States Treasury (2004 add'l. excise tax)	351.
M&I Marshall & Ilsley Bank (2009 4th qtr est. excise tax)	106.
Total	<u>1,936.</u>

Supporting Statement of:

Form 990-PF, pl/Line 21(a)

Description	Amount
Friends of Schlitz Audubon Nature Center (event fee)	800.
Donors Forum of Wisconsin (event fee)	35.
SHARP Literacy Inc. (event fee)	210.
Milwaukee Public Museum (event fee)	800.
Milwaukee Public Library Foundation (event fee)	600.
Total	<u>2,445.</u>

Supporting Statement of:

Form 990-PF, pl/Line 21(d)

Description	Amount
Friends of Schlitz Audubon Nature Center (event fee)	800.
Donors Forum of Wisconsin (event fee)	35.
SHARP Literacy Inc. (event fee)	210.
Milwaukee Public Museum (event fee)	800.
Milwaukee Public Library Foundation (event fee)	600.
Total	<u>2,445.</u>

Supporting Statement of:

Form 990-PF, p1/Line 23(a)-1

Description	Amount
Cook & Franke S.C. (disbursements)	502.
Donors Forum of Wisconsin (membership dues)	625.
Wis. Dept. of Financial Institutions (annual report)	10.
Total	<u>1,137.</u>

Supporting Statement of:

Form 990-PF, p2/Line 2(a)

Description	Amount
Fidelity Cash Reserves Money Market	-15,500.
Fidelity Institutional Money Market	1,826,223.
Fidelity Money Market	477,110.
Total	<u>2,287,833.</u>

Supporting Statement of:

Form 990-PF, p2/Line 2(b)

Description	Amount
Fidelity Cash Reserves Money Market	-59,000.
Fidelity Institutional Money Market	367,756.
Fidelity Money Market	347,888.
Total	<u>656,644.</u>

Supporting Statement of:

Form 990-PF, p2/Line 2(c)

Description	Amount
Fidelity Cash Reserves Money Market	-59,000.
Fidelity Institutional Money Market	367,756.
Fidelity Money Market	347,888.
Total	<u>656,644.</u>

Supporting Statement of:

Form 990-PF, p8/Part X, Line 1c

Description	Amount
Milwaukee Immediate Care Corporation Loan dated May 19, 2009 (\$15,000/365 x 226 days)	9,288.
Total	<u>9,288.</u>

Supporting Statement of:

Form 990-PF, p12/Line 4 Column (d)

Description	Amount
AFLAC Inc.	43,120.
Fidelity Cash Reserves Money Market	8.
Fidelity Institutional Money Market	8,640.
Fidelity Money market	2,953.
Wood Asset Management Core Account	26.
McVean Trading & Investments, Inc.	31.
Total	<u>54,778.</u>

Additional Information For Tax Return

Dorothy Inbusch Foundation, Inc.

39-6084238

Form 990-PF, p2: Line 7 Receivables

Loan to Milwaukee Immediate Care Corporation, a 501(c)(3) public charity

DOROTHY INBUSCH FOUNDATION
2009 Grants

A			B		C	D	E	F	G	H
1	2	3	Charities		City	State	Zip Code		2009 PROJECT REQUEST	2009 Grants
4	Admission Possible		603 North Milwaukee Street		Milwaukee	WI	53202	Public Charity	OPERATING FUNDS	\$ 2,000
5	Adult Learning Center		1916 North 4th Street		Milwaukee	WI	53212	Public Charity	ADULT BASIC EDUCATION (LITERACY)	\$ 2,500
6	Badger Association of the Blind and Visually Impaired, Inc		912 North Hawley Road		Milwaukee	WI	53213	Public Charity	LIFE SKILLS PROGRAM	\$ 3,000
7	Boerner Botanical Gardens, Friends of		9400 Boerner Drive, Suite 1		Hales Corners	WI	53130	Public Charity	CHILDREN'S EDUCATION PROGRAMS	\$ 5,000
8	ChristPond Foundation, Inc		921 East Calumet Road		Milwaukee	WI	53217	Public Charity	WEBSITE DEVELOPMENT COSTS	\$ 2,000
9	Danceworks, Inc		1661 North Water Street		Milwaukee	WI	53202	Public Charity	MAD HOT BALLROOM AND TAP	\$ 2,500
10	Fellow Mortals Wildlife Hospital Foundation, Inc		6925 North Wildwood Point Road		Chenequa	WI	53029	Public Charity	2009 WILDLIFE CARE INTERN PROGRAM	\$ 1,000
11	First Stage Children's Theater		325 West Walnut Street		Milwaukee	WI	53212	Public Charity	WORLD PREMIERE PRODUCTION OF THE WIZ	\$ 3,000
12	Gilda's Club Southeastern Wisconsin		4050 North Oakland Avenue		Milwaukee	WI	53211	Public Charity	FREE CANCER SUPPORT PROGRAM	\$ 2,000
13	Kradwell School		1220 Dewey Avenue		Wauwatosa	WI	53213-2598	Public Charity	CONSTRUCTION OF LEARNING GARDENS	\$ 2,500
14	Make A Difference Wisconsin Inc		710 North Plankinton Avenue, Suite 310 City of Mequon		Milwaukee	WI	53203	Public Charity	2009/2010 PROGRAM SUPPORT	\$ 5,000
15	Mequon Nature Preserve		11333 North Cedarburg Road		Mequon	WI	53092	Public Charity	OPERATING FUNDS	\$ 7,500
16	Milwaukee Community Sailing Center		1450 North Lincoln Memorial Drive		Milwaukee	WI	53202	Public Charity	CAMPAIGN FOR TODAY'S YOUTH & TOMORROW'S LEADERSHIP	\$ 5,000
17	Milwaukee Public Library Foundation, Inc		814 West Wisconsin Avenue		Milwaukee	WI	53233	Public Charity	CONTRIBUTION COMPONENT OF BENJAMIN FRANKLIN AWARD CELEBRATION	\$ 2,400
18	Milwaukee Public Library Foundation, Inc		814 West Wisconsin Avenue		Milwaukee	WI	53233	Public Charity	OPERATING SUPPORT	\$ 3,500
19	Milwaukee Public Museum		800 West Wells Street		Milwaukee	WI	53233	Public Charity	TRAVELING EXHIBITION OF THE DEAD SEA SCROLLS AND THE BIBLE: ANCIENT ARTIFACTS, TIMELESS TREASURES	\$ 6,500
20	Milwaukee Public Museum		800 West Wells Street		Milwaukee	WI	53233	Public Charity	CONTRIBUTION COMPONENT OF TABLE AT ANNUAL GALA ON SATURDAY, OCTOBER 17, 2009	\$ 2,700
21	Milwaukee Repertory Theater		108 East Wells Street		Milwaukee	WI	53202	Public Charity	ACCESS PROGRAMS	\$ 5,000
22	MPTV Friends		700 West State Street		Milwaukee	WI	53233-1443	Public Charity	CHILDREN'S LITERACY PROGRAMS AND COMMUNITY OUTREACH INITIATIVE	\$ 5,000
23	MPTV Friends		700 West State Street		Milwaukee	WI	53233-1443	Public Charity	HEALTHY KIDS HEALTH COMMUNITIES	\$ 5,000
24	Natural Resources Foundation of Wisconsin		P O Box 2317		Madison	WI	53701-2317	Public Charity	FIELD TRIP PROGRAM	\$ 2,000
25	Next Act Theatre		P O Box 394		Milwaukee	WI	53201	Public Charity	THE NEXT ACTORS: SUMMER THEATRE FOR TEENS	\$ 5,000
26	Next Door Foundation		2545 North 29th Street		Milwaukee	WI	53210	Public Charity	COMMUNITY, PARENT AND CHILD EDUCATION PROGRAMS	\$ 2,500
27	Nonprofit Center of Milwaukee, Inc		2819 West Highland Boulevard		Milwaukee	WI	53208-3217	Public Charity	JOBS THAT SERVE PROGRAM	\$ 2,500
28	Opera for the Young		6441 Enterprise Lane, Suite 207		Madison	WI	53719	Public Charity	SUPPORT OF EIGHT SCHOOL PERFORMANCES IN MILWAUKEE COUNTY IN SPRING, 2010	\$ 1,000
29	Ozaukee Washington Land Trust, Inc., The		141 North Main Street Suite 209 P O Box 917		West Bend	WI	53095	Public Charity	PROPERTY ACQUISITION FUNDS	\$ 5,000

DOROTHY INBUSCH FOUNDATION
2009 Grants

Line	A Charities	B Address	C City	D State	E Zip Code	F	G 2009 PROJECT REQUEST	H 2009 Grants
30	Park People, The	1845 North Farwell Avenue, Suite 100	Milwaukee	WI	53202	Public Charity	OPERATING SUPPORT	\$ 2,500
31	Penfield Children's Center	833 North 26th Street	Milwaukee	WI	53233	Public Charity	SPECIAL CARE NURSERY	\$ 2,500
32	Piano Arts of Wisconsin, Inc	2642 North Summit Avenue	Milwaukee	WI	53211-3840	Public Charity	PIANOARTS 2010 NORTH AMERICAN COMPETITION AND FELLOWSHIP PROGRAMS	\$ 7,500
33	Planned Parenthood of Southwest and Central FL, Inc	736 Central Avenue	Sarasota	FL	34236-4042	Public Charity	GENERAL OPERATING SUPPORT	\$ 10,000
34	Planned Parenthood of Wisconsin, Inc	302 North Jackson Street	Milwaukee	WI	53202	Public Charity	MILWAUKEE TEEN CONTRACEPTIVE ACCESS PROGRAM	\$ 2,500
35	Rawhide, Inc	E7475 Rawhide Road	New London	WI	54961	Public Charity	MILWAUKEE YOUTH AND FAMILY COUNSELING SERVICES INITIATIVE	\$ 2,000
36	River Revitalization Foundation, Inc	1845 North Farwell Avenue, Suite 100	Milwaukee	WI	53202	Public Charity	PURCHASE OF "WHEELHOUSE" PARCEL AND PHASE I IMPROVEMENTS	\$ 4,000
37	St. Joan Antida High School	1341 North Cass Street	Milwaukee	WI	53202-2796	Public Charity	ENGINEERING PROGRAM PROJECT LEAD THE WAY (PLTW)	\$ 5,000
38	Schlitz Audubon Nature Center, Friends of	1111 East Brown Deer Road	Milwaukee	WI	53217	Public Charity	CONTRIBUTION COMPONENT OF TABLE AT 2009 6TH ANNUAL GALA "NATURE'S TREASURERS"	\$ 2,200
39	Schlitz Audubon Nature Center, Friends of	1111 East Brown Deer Road	Milwaukee	WI	53217	Public Charity	ANNUAL FUND CAMPAIGN	\$ 5,000
40	SHARP Literacy, Inc	750 North Lincoln Memorial Drive Suite 311	Milwaukee	WI	53202	Public Charity	FIRST GRADE PILOT PROJECT	\$ 3,500
41	SHARP Literacy, Inc	750 North Lincoln Memorial Drive, Suite 311	Milwaukee	WI	53202	Public Charity	CONTRIBUTION COMPONENT OF TABLE AT "A NOVEL EVENT" LUNCHEON	\$ 2,290
42	Skylight Opera Theatre	158 North Broadway	Milwaukee	WI	53202	Public Charity	50TH ANNIVERSARY ANNUAL CAMPAIGN	\$ 5,000
43	Sojourner Family Peace Center	P O Box 080319	Milwaukee	WI	53208	Public Charity	SUPPORT OF 24-HOUR DOMESTIC VIOLENCE HOTLINE	\$ 2,000
44	United Community Center	1028 South 9th Street	Milwaukee	WI	53204	Public Charity	UCC SCIENCE INITIATIVE	\$ 5,000
45	United Performing Arts Fund	929 North Water Street	Milwaukee	WI	53202	Public Charity	2009 CAMPAIGN	\$ 1,000
46	United Performing Arts Fund	929 North Water Street	Milwaukee	WI	53202	Public Charity	2010 CAMPAIGN	\$ 1,000
47	United Way	225 West Vine Street	Milwaukee	WI	53212	Public Charity	2009 CAMPAIGN	\$ 1,000
48	Urban Ecology Center	1500 East Park Place	Milwaukee	WI	53211	Public Charity	NEIGHBORHOOD ENVIRONMENTAL EDUCATION PROJECT	\$ 7,500
49	Wisconsin Conservatory of Music	1584 North Prospect Avenue	Milwaukee	WI	53202	Public Charity	TUITION ASSISTANCE PROGRAM	\$ 7,500
50	Wisconsin Taxpayers Alliance	401 North Lawn Avenue	Madison	WI	53704-5033	Public Charity	OPERATING FUNDS	\$ 1,000
51	WUWM Milwaukee Public Radio	161 West Wisconsin Avenue, Suite LL1000 P O Box 413	Milwaukee	WI	53201-0413	Public Charity	SUPPORT OF ENVIRONMENTAL NEWS PRODUCER	\$ 7,500
52	TOTAL CONTRIBUTIONS PAID							\$ 178,590
53								