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Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

2009

Department of the Treasury
Internal Revenue Service

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

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

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

Use the IRS label Otherwise, print or type. See Specific Instructions	Name of foundation CLARENCE AND PEARL BECKER CHARITABLE FOUNDATION		A Employer identification number 39-6775961
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number (414) 352-3257
	City or town, state, and ZIP code MILWAUKEE, WI 53217-1446		C If exemption application is pending, check here <input type="checkbox"/>
	H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1 Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 434,189.		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	12,795.	12,795.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	*6a Net gain or (loss) from sale of assets not on line 10	<45,618.>			
	b Gross sales price for all assets on line 6a	29,200.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total Add lines 1 through 11	<32,823.>	12,795.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees				
	c Other professional fees	STMT 2	3,233.	3,233.	0.
	17 Interest				
	18 Taxes	STMT 3	282.	0.	0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses				
	24 Total operating and administrative expenses Add lines 13 through 23	3,515.	3,233.		0.
	25 Contributions, gifts, grants paid	25,957.			25,957.
26 Total expenses and disbursements Add lines 24 and 25	29,472.	3,233.		25,957.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	<62,295.>				
b Net investment income (if negative, enter -0-)		9,562.			
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		626.	100.	100.
	2	Savings and temporary cash investments		84,699.	66,071.	66,071.
	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		560.	336.	336.
	10a	Investments - U S and state government obligations				
	b	Investments - corporate stock				
	c	Investments - corporate bonds				
Liabilities	11	Investments - land, buildings, and equipment basis ▶				
		Less: accumulated depreciation ▶				
	12	Investments - mortgage loans				
	13	Investments - other STMT 4	452,429.	409,512.	367,682.	
	14	Land, buildings, and equipment: basis ▶				
		Less: accumulated depreciation ▶				
	15	Other assets (describe ▶)				
	16	Total assets (to be completed by all filers)	538,314.	476,019.	434,189.	
	17	Accounts payable and accrued expenses				
	18	Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
23	Total liabilities (add lines 17 through 22)	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	0.	0.		
28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.			
29	Retained earnings, accumulated income, endowment, or other funds	538,314.	476,019.			
30	Total net assets or fund balances	538,314.	476,019.			
31	Total liabilities and net assets/fund balances	538,314.	476,019.			

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	538,314.
2	Enter amount from Part I, line 27a	2	<62,295.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	476,019.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	476,019.

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FOUNDATION

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a 650 SH US BANCORP	P	04/08/08	02/10/09
b 400 SH I SHARES MSCI EAFE INDEX	P	04/08/08	02/10/09
c 1,000 SH ROYAL BK SCOTLAND 7.25%	P	12/26/07	02/10/09
d CAPITAL GAINS DIVIDENDS			
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 9,051.		21,953.	<12,902.>
b 15,068.		30,165.	<15,097.>
c 4,339.		22,700.	<18,361.>
d 742.			742.
e			

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			<12,902.>
b			<15,097.>
c			<18,361.>
d			742.
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	<45,618.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	}	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	25,199.	508,556.	.049550
2007	0.	523,022.	.000000
2006			
2005			
2004			

2 Total of line 1, column (d)	2	.049550
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	.024775
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	409,653.
5 Multiply line 4 by line 3	5	10,149.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	96.
7 Add lines 5 and 6	7	10,245.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	25,957.

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	96.
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	96.
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	96.
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 336.	7	336.
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	240.
7 Total credits and payments. Add lines 6a through 6d		11	0.
8 Enter any penalty for underpayment of estimated tax. Check here <input 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 240. Refunded			

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
b 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
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. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 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) WI		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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FOUNDATION

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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?	13	X	

Website address ► N/A

14 The books are in care of ► STEPHEN BECKER Telephone no ► 414-352-3257
 Located at ► 9370 N LAKE DRIVE, MILWAUKEE, WI ZIP+4 ► 53217

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ☐
 and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A

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

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

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

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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)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

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

N/A

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?

If "Yes" to 6b, file Form 8870

☐ Yes ☒ No

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

N/A

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.

(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
STEPHEN S BECKER	TRUSTEE			
9370 N LAKE DRIVE				
MILWAUKEE, WI 53217	1.00	0.	0.	0.
BONNIE GOULD	TRUSTEE			
4550 PARK MARBELLA				
CALABASAS, CA 91302	1.00	0.	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."

[illegible]

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

C

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.		Amount
1	N/A	
2		
All other program-related investments. See instructions.		
3		

Total. Add lines 1 through 3

0.

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CLARENCE AND PEARL BECKER CHARITABLE
FOUNDATION**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	341,278.
b	Average of monthly cash balances	1b	74,613.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	415,891.
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	415,891.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	6,238.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	409,653.
6	Minimum investment return. Enter 5% of line 5	6	20,483.

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	20,483.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	96.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	96.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	20,387.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	20,387.
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	20,387.

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	25,957.
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	25,957.
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	96.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	25,861.

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.

CLARENCE AND PEARL BECKER CHARITABLE
FOUNDATION**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				20,387.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			25,204.	
b Total for prior years: 2007, _____, _____		193.		
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 25,957.				
a Applied to 2008, but not more than line 2a			25,204.	
b Applied to undistributed income of prior years (Election required - see instructions)		193.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2009 distributable amount				560.
e Remaining amount distributed out of corpus	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.			0.
6 Enter the net total of each column as indicated below				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
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				19,827.
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	0.			
9 Excess distributions carryover to 2010 Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

Part XIV

Private Operating Foundations (see instructions and Part VII A, question 9)

N/A

1 a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling

b

Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

2 a

Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year

Prior 3 years

(a) 2009

(b) 2008

(c) 2007

(d) 2006

(e) Total

b

85% of line 2a

c

Qualifying distributions from Part XII, line 4 for each year listed

d

Amounts included in line 2c not used directly for active conduct of exempt activities

e

Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c

3

Complete 3a, b, or c for the alternative test relied upon:

a

"Assets" alternative test - enter:

(1)

Value of all assets

(2)

Value of assets qualifying under section 4942(j)(3)(B)(i)

b

"Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c

"Support" alternative test - enter:

(1)

Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2)

Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3)

Largest amount of support from an exempt organization

(4)

Gross investment income

Part XV

Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see the instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2))

NONE

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here

☒

if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number of the person to whom applications should be addressed:

b

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

c

Any submission deadlines:

d

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

923801 02-02-10

Form 990-PF (2009)

12

09470317 768059 140280000 2009.03010 CLARENCE AND PEARL BECKER C 14028001

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

923621
02-02-10

Form **990-PF** (2009)

Part XVII

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

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

[illegible]

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

- b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

Sign Here


☒ Signature of officer or trustee

13/26/10
Date

TRUSTEE

Title

**Paid
Preparer's
Use Only**

Preparer's signature  David R Wynn CPA

Date
03/17/10

Check if self-employed ☐

Preparer's identifying number

Firm's name (or yours if self-employed), address, and ZIP code

SCRIBNER, COHEN AND COMPANY, S.C., CPAS
400 EAST MASON STREET, SUITE 300
MILWAUKEE, WI 53202

Phone no. (414) 271-1700

Form **990-PF** (2009)

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
RW BAIRD	13,537.	742.	12,795.
TOTAL TO FM 990-PF, PART I, LN 4	13,537.	742.	12,795.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	3,175.	3,175.		0.
OFFICE EXPENSE	58.	58.		0.
TO FORM 990-PF, PG 1, LN 16C	3,233.	3,233.		0.

FORM 990-PF	TAXES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX	282.	0.		0.
TO FORM 990-PF, PG 1, LN 18	282.	0.		0.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	4
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
RW BAIRD STOCKS/BOND FUNDS	COST	409,512.	367,682.
TOTAL TO FORM 990-PF, PART II, LINE 13		409,512.	367,682.

FORM 990-PF	GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR	STATEMENT	5
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RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
ALZHEIMERS ASSOCIATION 5900 WILSHIRE BLVD, #1100 LOS ANGELES, CA 90036	GENERAL		500.
AMERICAN CANCER SOCIETY 333 WILSHIRE BLVD LOS ANGELES, CA 90010	GENERAL		500.
AURORA SINAI MEDICAL CENTER 945 N. 12TH ST MILWAUKEE, WI 53233	JUDY KERNS PENCE CANCER FUND		100.
BLUE COATS FOUNDATION INC P.O. BOX 2035 MILWAUKEE, WI 53201	GENERAL		250.
UNIVERSITY OF CALIFORNIA, BERKELEY SCHOOL OF LAW 2850 TELEGRAPH AVE, STE 500 BERKELEY, CA 94705	BOALT HALL FUND		1,000.
BOYS AND GIRLS CLUBS OF GREATER MILWAUKEE 1558 NORTH 6TH STREET MILWAUKEE, WI 53212	GENERAL		100.
BREAST CANCER RESEARCH FOUNDATION 60 EAST 56TH STREET, 8TH FLOOR NEW YORK, NY 10022	GENERAL		500.
CHILDRENS HOSPITAL OF LOS ANGELES 4650 SUNSET BLVD #29 LOS ANGELES, CA 90027	GENERAL		4,300.

CLARENCE AND PEARL BECKER CHARITABLE FOU	39-6775961
COA YOUTH AND FAMILY CENTERS 909 EAST NORTH AVENUE MILWAUKEE, WI 53212	GENERAL 500.
CONGREGATION EMANU-EL B'NE JESHURUN 2020 WEST BROWN DEER ROAD RIVER HILLS, WI 53217	GENERAL 200.
EASTER SEALS SOUTHEAST WISCONSIN 1016 MILWAUKEE AVE SOUTH MILWAUKEE, WI 53172	GENERAL 200.
FRIENDS OF NORTH SHORE LIBRARY 6800 N. PORT WASHINGTON ROAD GLENDALE, WI 53217	GENERAL 20.
JEWISH FAMILY SERVICES 1300 NORTH JACKSON ST MILWAUKEE, WI 53202	GENERAL 180.
JEWISH HOME AND CARE CENTER FOUNDATION 1414 NORTH PROSPECT AVENUE MILWAUKEE, WI 53202	GENERAL 100.
JEWISH MUSEUM MILWAUKEE 1360 NORTH PROSPECT AVE MILWAUKEE, WI 53202	GENERAL 300.
JEWISH NATIONAL FUND 6270 N PORT WASHINGTON RD, STE 100 MILWAUKEE, WI 53217	GENERAL 100.
JUNIOR ACHIEVEMENT OF WISCONSIN, INC. 6924 N PORT WASHINGTON RD MILWAUKEE, WI 53217	ANNUAL CAMPAIGN 750.
LEUKEMIA & LYMPHOMA SOCIETY 200 SOUTH EXECUTIVE DR, STE 203 BROOKFIELD, WI 53005	GENERAL 200.

MAKE A WISH FOUNDATION 1875 CENTURY PARK EAST, SUITE 950 LOS ANGELES, CA 90067	GENERAL	500.
MARQUETTE UNIVERSITY P.O. BOX 1881 MILWAUKEE, WI 53201	COLLEGE OF BUSINESS ADMINISTRATION	100.
MEDICAL COLLEGE OF WISCONSIN 8701 WATERTOWN PLANK ROAD MILWAUKEE, WI 53226	GENERAL	350.
MILWAUKEE CENTER FOR INDEPENDENCE 2020 WEST WELLS STREET MILWAUKEE, WI 53233	GENERAL	250.
MILWAUKEE JEWISH FEDERATION 1360 NORTH PROPSECT AVE MILWAUKEE, WI 53202	GENERAL	500.
MILWAUKEE SCHOOL OF ENGINEERING 1025 NORTH BROADWAY MILWAUKEE, WI 53202	GENERAL	250.
MPTV FRIENDS 700 W. STATE ST MILWAUKEE, WI 53233	GENERAL	200.
MUSEUM OF TOLERANCE 9786 WEST PICO BLVD LOS ANGELES, CA 90035	GENERAL	100.
SCHLITZ AUDUBON NATURE CENTER 1111 E. BROWN DEER ROAD MILWAUKEE, WI 53217	GENERAL	150.
SIMON WIESENTHAL CENTER 1399 SOUTH ROXBURY LOS ANGELES, CA 90035	GENERAL	100.

SKIRBALL CULTURAL CENTER 2701 NORTH SEPULVEDA BLVD LOS ANGELES, CA 90049	GENERAL	65.
ST. FRANCIS CHILDREN'S CENTER 6700 N. PORT WASHINGTON ROAD MILWAUKEE, WI 53217	AWARDS BANQUET	250.
SUSAN G. KOMEN FOR THE CURE 1000 E WALNUT ST, #123 PASADENA, CA 91106	GENERAL	500.
TUFTS UNIVERSITY 80 GEORGE STREET, STE 200 MEDFORD, MA 02155519	FUND FOR ARTS & SCIENCES	50.
UCLA FOUNDATION 10920 WILSHIRE BLVD, SUITE 900 LOS ANGELES, CA 90024	GENERAL	100.
THE JEWISH FEDERATION OF GREATER LOS ANGELES 6505 WILSHIRE BLVD LOS ANGELES, CA 90048	GENERAL	2,500.
UNIVERSITY OF WISCONSIN FOUNDATION 1848 UNIVERSITY AVENUE MADISON, WI 53708	GENERAL	100.
UNIVERSITY OF WISCONSIN FOUNDATION 1848 UNIVERSITY AVENUE MADISON, WI 53708	WISCONSIN SCHOOL OF BUSINESS	100.
UNIVERSITY OF WISCONSIN FOUNDATION 1848 UNIVERSITY AVENUE MADISON, WI 53708	CALS FORWARD FUND	750.
UNIVERSITY OF WISCONSIN MILWAUKEE FOUNDATION P.O. BOX 413 MILWAUKEE, WI 53201	CENTER FOR 21ST CENTURY STUDIES	250.

UNIVERSITY SCHOOL OF MILWAUKEE 2100 WEST FAIRY CHASM ROAD MILWAUKEE, WI 53217	GENERAL	250.
WINDLAKE ELEMENTARY SCHOOL 2433 SOUTH 15TH STREET MILWAUKEE, WI 53215	GENERAL	250.
WISCONSIN JEWISH CHRONICLE 1360 NORTH PROPSECT AVE MILWAUKEE, WI 53202	GENERAL	100.
UNIVERSITY OF WISCONSIN MILWAUKEE FOUNDATION 3230 EAST KENWOOD BOULEVARD MILWAUKEE, WI 53211	WUWM FRIENDS	400.
NATIONAL MILITARY FAMILY ASSOCIATION 2500 NORTH VAN DORN STREET, SUITE 102 ALEXANDRIA, VA 22302	GENERAL	100.
PILLARS 5770 TEMPLE JUDEA 5429 LINDLEY AVENUE TARZANA, CA 91356	GENERAL	100.
TRAGEDY ASSISTANCE PROGRAM FOR SURVIVORS 1777 F STREET,NW, SUITE 600 WASHINGTON DC, DC 20006	GENERAL	100.
USO OF WISCONSIN 750 N LINCOLN MEMORIAL DRIVE, SUITE 303 MILWAUKEE, WI 53202	GENERAL	100.
US HOLOCAUST MUSEUM PO BOX 90988 WASHINGTON DC, DC 20090	GENERAL	50.
AMERICAN HEART ASSOCIATION 1710 GILBRETH ROAD BURLINGAME, CA 94010	GENERAL	500.

JEWISH HOME FOR THE AGING 7150 TAMPA AVENUE RESEDA, CA 91335	GENERAL	500.
HAVEN HILLS PO BOX 260 CANOGA PARK, CA 91305	GENERAL	300.
RONALD MCDONALD HOUSE CHAIRTIES OF SOUTHERN CALIFORNIA 765 S PASADENA AVENUE PASADENA, CA 91105	GENERAL	250.
BET TZEDEK - THE HOUSE OF JUSTICE 145 S FAIRFAX AVENUE, SUITE 200 LOS ANGELES, CA 90036	GENERAL	250.
BAYSIDE CIVIC FOUNDATION 9075 NORTH REGENT ROAD BAYSIDE, WI 53217	GENERAL	2,000.
UNIVERSITY OF WISCONSIN FOUNDATION 1848 UNIVERSITY AVENUE MADISON, WI 537088860	BADGER FUND	1,000.
UNITED PERFORMING ARTS FUND 929 NORTH WATER STREET MILWAUKEE, WI 53202-3187	GENERAL	150.
WINONA PUBLIC LIBRARY 151 W. 5TH STREET PO BOX 1247 WINONA, MN 55987-7247	GENERAL	25.
AMERICA SCORES MILWAUKEE 7101 W GOODHOPE ROAD MILWAUKEE , WI 53223	GENERAL	90.
ROTARY CLUB OF MILWAUKEE COMMUNITY TRUST 750 N LINCOLN MEMORIAL DRIVE, SUITE 320 MILWAUKEE, WI 53202	GENERAL	500.

UNIVERSITY OF WISCONSIN FOUNDATION 1848 UNIVERSITY AVENUE MADISON, WI 537088860	SCHOOL OF EDUCATION	100.
UNIVERSITY OF WISCONSIN MILWAUKEE FOUNDATION 3230 EAST KENWOOD BOULEVARD MILWAUKEE, WI 53211	ART HISTORY DEPARTMENT	100.
WISCONSIN PSYCHOANALYTIC FOUNDATION 2025 EAST NEWPORT AVENUE FOURTH FLOOR MILWAUKEE, WI 53211	GENERAL	50.
WALNUT WAY CONSERVATION CORP 2240 NORTH 17TH STREET MILWAUKEE , WI 53205	GENERAL	500.
AURORA FOUNDATION 950 N 12TH STREET, SUITE A511 MILWAUKEE, WI 53233	CARDIOLOGY FUND	100.
AMERICA'S SECOND HARVEST OF WISCONSIN 1700 W FOND DU LAC AVENUE MILWAUKEE, WI 53205-1299	GENERAL	127.
HUNGER TASK FORCE 201 S HAWLEY COURT MILWAUKEE, WI 53214	GENERAL	100.
UNITED WAY OF GREATER MILWAUKEE 225 WEST VINE STREET MILWAUKEE , WI 53212-3935	GENERAL	100.
SOJOURNER FAMILY PEACE CENTER PO BOX 080319 MILWAUKEE, WI 53208	GENERAL	100.
AURORA VISITING NURSES ASSOCIATION 11333 W NATIONAL AVENUE MILWAUKEE, WI 53227	GENERAL	25.

MILWAUKEE ART MUSEUM		70.
700 NORTH ART MUSEUM DRIVE	GENERAL	
MILWAUKEE, WI 53202		
MILWAUKEE PUBLIC MUSEUM		280.
800 W WELLS STREET MILWAUKEE,	GENERAL	
WI 53233-1478		
JOHN MICHAEL KOHLER ARTS CENTER		100.
608 NEW YORK AVENUE SHEBOYGAN,	GENERAL	
WI 53081-4507		
ROSALIE MANOR		200.
4803 W BURLEIGH STREET	GENERAL	
MILWAUKEE, WI 53210		
FROEDTERT HOSPITAL FOUNDATION		25.
9200 WEST WISCONSIN AVENUE	GENERAL	
MILWAUKEE, WI 53226-3596		

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

25,957.

**SECTION 4942(h)(2) ELECTION
AS TO THE TREATMENT OF QUALIFYING DISTRIBUTIONS**

Pursuant to IRC Sec. 4942(h)(2) and Reg. 53.4942(a)-3(d)(2), the above referenced foundation hereby elects to treat current year qualifying distributions in excess of the immediately preceding tax year's undistributed income as being made out of (check one):

☒ Undistributed income from the tax year(s) ending:

<u>Tax Year</u>	<u>Amount</u>
<u>2007</u>	<u>\$ 193</u>
<u> </u>	<u> </u>

☐ Corpus.

Signed: _____

Stephen S. Becker

3/26/10

Date

Stephen S. Becker, Trustee
Name and Title

Election E301

**SECTION 4942(h)(2) ELECTION
AS TO THE TREATMENT OF QUALIFYING DISTRIBUTIONS**

Pursuant to IRC Sec. 4942(h)(2) and Reg. 53.4942(a)-3(d)(2), the above referenced foundation hereby elects to treat current year qualifying distributions in excess of the immediately preceding tax year's undistributed income as being made out of (check one):

☒ Undistributed income from the tax year(s) ending:

<u>Tax Year</u>	<u>Amount</u>
<u>2007</u>	<u>\$ 193</u>
<u> </u>	<u> </u>

☐ Corpus.

Signed: X

Stephen S. Becker

3/26/10

Date

Stephen S. Becker, Trustee
Name and Title

Election E301