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990-PF

Department of the Treasury Internal Revenue Service

Return of Private Foundation

or 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

OMB No 1545-0052

Form **990-PF**

Check all that apply: Initial return Address change Name change	Fo	or calendar	year 2009, or tax ye	ar beginning	, and	d ending			
Use the IRS Name of foundation Address change Name change Vert Foundation number Vert Foundation of John Nelson A Employer identification number A 1-5543299 B Teleptone number (see page 10 of the methodines) A 1-5543299 B Teleptone number (see page 10 of the methodines) A 1-5543299 B Teleptone number (see page 10 of the methodines) A 1-5543299 B Teleptone number (see page 10 of the methodines) A 1-5543299 B Teleptone number (see page 10 of the methodines) A 1-5543299 B Teleptone number (see page 10 of the methodines) A 1-55402 D 1-55	G	Check all t	hat apply:	Initial return	Initial return of a form	ner public char	ity	Final re	turn
Limited Company Comp				Amended return	Address change	☐ Naı	ne change	•	
Table	\neg	Jse the IRS	Name of foundation				A Employe	er identification nu	mber
Number and street (or P o box number of mail is not delivered to street address) Profit or type. 20 South Sixth Sixtest Coy or town, sales, and 2P code Instructions. Minnagonis No. 1 Control of organization: Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation Fair market value of all assets at end of year (from Part II, col (c), and (b) may not necessarily equal an entire street in a market or savings and temporary cash investments 1 Contributions, gifts, grants, etc. received (attach schedule) 2 Check — 1 Check report of the marketichen) 1 Contributions, gifts, grants, etc. received (attach schedule) 2 Check — 1 Check report of the marketichen) 1 Control of the contr		label.		/o John Nelson					
Point Cotype Co		Otherwise,			elivered to street address)	Room/suite	B Telephor		
See Specific Inventions. Minneapolis		•	1			1	D Totophio		•
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1 Cash—non-interest-bearing 2 Savings and temporary cash investments	D۵	rt {l	Balance Sheets Attached schedules and amounts in the description column	Beginning of year	End	of year
2 Savings and temporary cash investments 478,332 851,654 851,654 3 Account's receivable	ra	1311	should be for end-of-year amounts only. (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
A Accounts receivable 0		1	Cash—non-interest-bearing			
Less: allowance for doubtful accounts		2	Savings and temporary cash investments	478,392	851,654	851,654
Less: allowance for doubtful accounts		3	Accounts receivable ▶ 0			
Piedges receivable 0				<u>o</u>	0	0
Less: allowance for doubtful accounts		4				
S Grants receivable			Less: allowance for doubtful accounts	0	C	0
disqualified persons (attach schedule) (see page 15 of the instructions).		5				
1		6				
7 Other notes and loans receivable (attach schedule)			disqualified persons (attach schedule) (see page 15 of the			
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10 a Investments—LS and state government obligations (attach schedule) 0 0 0 0	Se	8	Inventones for sale or use			
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C Investments—corporate bonds (attach schedule)		10 a	Investments—US and state government obligations (attach schedule)		<u>_</u>	
11 Investments—land, buildings, and equipment basis		t	Investments—corporate stock (attach schedule)	5,678,141		·
Less accumulated deprecation (attach schedule)		(investments—corporate bonds (attach schedule)	0	1,705,241	1,705,241
12 Investments—mortgage loans 0 0 0 0 0 0 0 0 0		11	Investments—land, buildings, and equipment basis		*	* * * * * * * * * * * * * * * * * * * *
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14 Land, buildings, and equipment: basis		12	Investments—mortgage loans			
Less accumulated depreciation (attach schedule)		13	Investments—other (attach schedule)	0	C	0
Less accumulated depreciation (attach schedule)		14	Land, buildings, and equipment: basis			
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end-of-year figure reported on prior year's return) 2 Enter amount from Part I, line 27a				30 (must agree with		
2 378,632 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 4 6,535,165 5 Decreases not included in line 2 (itemize) 5 0					1	6,156,533
3 0ther increases not included in line 2 (itemize) ▶ 3 0 4 Add lines 1, 2, and 3	2					
4 Add lines 1, 2, and 3						
5 Decreases not included in line 2 (itemize) ▶ 5 0				6,535,165		
			and and included in the O (damma)			0
	6	Total			6	6,535,165

(a) List and describe t	nd Losses for Tax on Invented the kind(s) of property sold (e.g., real est use, or common stock, 200 shs MLC C	ate,	(b) How acquired P—Purchase D—Donation	(c) Date acquire (mo , day, yr)	d (d) Date sold (mo , day, yr)	
1a Publicly Traded Securities						
b Capital Gains Distributions						
С						
d						
е						
(e) Gross sales pnce	(f) Depreciation allowed (or allowable)		st or other basis xpense of sale		Gain or (loss) lus (f) minus (g)	
a 876,990			368,903		508,087	
b 17,303			0		17,303	
	0 0		0		0	
e (0	
	wing gain in column (h) and owne	d by the found	<u>_</u>	(I) Cours		
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) E	cess of col (i)	col (k), bu	(Col. (h) gain minus it not less than -0-) or es (from col. (h))	
a (0		0		508,087	
			0		17,303	
	0		0		0	
	0		0		0	
e (0,		0		0	
2 Capital gain net income o		also enter in enter -0- in 1		2	525,390	
If gain, also enter in Part I	n or (loss) as defined in section , line 8, column (c) (see pages	13 and 17 c	f the }			
	er -0- in Part I, line 8			3	0	
Part V Qualification Un	der Section 4940(e) for Re	educed Tax	on Net Investm	ent Income		
If section 4940(d)(2) applies, Was the foundation liable for	private foundations subject to leave this part blank. the section 4942 tax on the dis not qualify under section 4940	stributable ar	nount of any year in			
				*: b- f	lias asu astrias	
	nount in each column for each	year; see pa	ge 18 of the instruc	tions before ma		
(a) Base penod years	(b)	l	(c)	(d) Distribution ratio		
Calendar year (or tax year beginning	in) Adjusted qualifying distribution	ns Net val	ue of nonchantable-use a	ssets (col	(b) divided by col (c))	
2008		0,000	5,790		0.025903	
2007		7,500	6,427		0.019837	
2006		5,862	5,208		0.024164	
2005	23	0,000	4,933	3,599	0.046619	
2004					_0.000000	
					0.116523	
	for the 5-year base period—di oundation has been in existend				0.029131	
4 Enter the net value of non	charitable-use assets for 2009	from Part X	, line 5	. 4	5,306,993	
5 Multiply line 4 by line 3 .				. 5	154,598	
6 Enter 1% of net investmen	nt income (1% of Part I, line 27	'b)		. 6	6,657	
7 Add lines 5 and 6				7	161,255	
	ons from Part XII, line 4				283,500	
If line 8 is equal to or greather the Part VI instructions or	iter than line 7, check the box	ın Part VI, lin	e 1b, and complete	tnat part using	a 1% tax rate. See	

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 1	8 of the ir	nstru	ıctio	ns)	
1 a Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. ☐			·	5 ,	
Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)			ľ		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check		6,6	57		
here ▶ X 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)			- 1		
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			_이_		
3 Add lines 1 and 2		6,6	57		
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 4			_		
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0		6,6	57		
6 Credits/Payments:					
a 2009 estimated tax payments and 2008 overpayment credited to 2009 6a 0			* 5		
b Exempt foreign organizations—tax withheld at source			*. j		
c Tax paid with application for extension of time to file (Form 8868) 6c 0		,	· · ·	ώ¢	
d Backup withholding erroneously withheld				<u> * </u>	
7 Total credits and payments. Add lines 6a through 6d			0		
8 Enter any penalty for underpayment of estimated tax. Check here			01		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		6,7	758		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			-0		
11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ■ 0 Refunded ■ 11			<u> </u>		
Part VII-A Statements Regarding Activities			-		
1 a Dunng the tax year, did the foundation attempt to influence any national, state, or local legislation or did it	L	<u> Y</u>		No	
participate or intervene in any political campaign?	<u> 1</u>	a		X	
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the					
instructions for definition)?	<u> 1</u>	b		X	
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.	<u></u>				
c Did the foundation file Form 1120-POL for this year?					
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:		١,	_ [.	Ŋ	
(1) On the foundation. \$			- 1.	ρη Α* π	
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed		1	l'.		
on foundation managers \$	<u> </u>			خفيه:	
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?	· · ·	2		<u>X</u>	
If "Yes," attach a detailed description of the activities.			- "	<u>.</u> .>;	
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles	<u> </u>		سلنك	<u></u>	
of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	<u> </u>	3	_	X	
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	_	a		Х	
b If "Yes," has it filed a tax return on Form 990-T for this year?		b N	I/A	$\overline{}$	
Was there a liquidation, termination, dissolution, or substantial contraction during the year?	· · ·	-	-, 7	<u>X</u>	
If "Yes," attach the statement required by General Instruction T. 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:	ŀ		2, 3		
 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	<u></u>	
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 Pa	_		$\frac{2}{x}$		
8 a Enter the states to which the foundation reports or with which it is registered (see page 19 of the	"^·		$^{\sim}+$	۰	
instructions) ► MN			- 1	٠.	
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	8	b	\mathbf{x}	~~~~	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3)	· · ·		1		
or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)?	<u> </u>				
If "Yes," complete Part XIV	9	•		Х	
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing	<u> </u>	\top	\neg		
their names and addresses	1	o		Х	

	Evert Foundation Go Sonit Neison 41-03-	1 3233	•	ago e
Par	t 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 page 20 of the instructions)	11		
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		Х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website address			
14	The books are in care of John Nelson Telephone no. ► 612-492-70 Located at 200 South Sixth Street, Suite 4000 Minneapolis MN ZIP+4 ► 55402	00		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here		•	• <u> </u>
	and enter the amount of tax-exempt interest received or accrued during the year			
Pa	rt 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.	1	Yes	No
1a	During the year did the foundation (either directly or indirectly):			7,1
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X No			Je#1
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)		*,	y . 14
	a disqualified person?		3.	***
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(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)?			
	(6) Agree to pay money or property to a government official? (Exception. Check "No"		~ 3°;	100°
	if the foundation agreed to make a grant to or to employ the official for a penod after termination of government service, if terminating within 90 days.)		*/	
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations		1	
U	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b	N/A	<u> </u>
	Organizations relying on a current notice regarding disaster assistance check here		14//	2 T
С	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts,		1 1	
	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))		, ,	
а	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d			45
	and 6e, Part XIII) for tax year(s) beginning before 2009?		3.1	
	If "Yes," list the years 20 , 20 , 20			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2)			100
	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2)		,,	23.
	to all years listed, answer "No" and attach statement—see page 20 of the instructions.)	2b	N/A	
C	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		***55	
	2 0		,	3.3
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?		ا (دیار	
b	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation			1 1 m
	or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved	,	1	, 'A'
	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			211
	If the foundation had excess business holdings in 2009.)	3b	N/A	.,
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	45	<u> </u>	<u> </u>
	purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	ı	ΙX

0

Form 990-PF (2009) Evert Foundation c/o John Nelson			Page 7
Part VIII Information About Officers, Directors, Trustee	s, Foundation Managers, Highly Pai	d Employees,	
and Contractors (continued)			
3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, ent	er "NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensati	ion
NONE			0
			0
			0
			0
			0
Total number of others receiving over \$50,000 for professional services	s . <u></u>	▶	0
Part IX-A Summary of Direct Charitable Activities			
List the foundation's four largest direct chantable activities during the tax year. Include releven the number of organizations and other beneficianes served, conferences convened, researched.		Expenses	
1	 		
N/A			
2			
3			
4			
			_
Part IX-B Summary of Program-Related Investments (see page 2)			
Describe the two largest program-related investments made by the foundation during the tax	c year on lines 1 and 2	Amount	
1			
2			
All other program-related investments See page 24 of the instructions			
3			

Total. Add lines 1 through 3

0

Pai	t X Minimum Investment Return (All domestic foundations must complete this part. Foreign	foundat	ions,
	see page 24 of the instructions.)		
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes:		
а	Average monthly fair market value of securities	1a	4,830,782
b	Average of monthly cash balances	1b	557,028
С	Fair market value of all other assets (see page 24 of the instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	5,387,810
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	5,387,810
4	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see page 25		
	of the instructions)	4	80,817
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,306,993
6	Minimum investment return. Enter 5% of line 5	6	265,350
Par	Distributable Amount (see page 25 of the instructions) (Section 4942(J)(3) and (j)(5) private of	perating	
	foundations and certain foreign organizations check here and do not complete this part.)		
1	Minimum investment return from Part X, line 6	1	265,350
2a	Tax on investment income for 2009 from Part VI, line 5	·	
b	Income tax for 2009 (This does not include the tax from Part VI.)	1	
C	Add lines 2a and 2b	2c	6,657
3	Distributable amount before adjustments. Subtract line 2c from line 1		258,693
4	Recovenes of amounts treated as qualifying distributions	4	*
5	Add lines 3 and 4	5	258,693
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII,		
•	line 1	7	258,693
			
Par	Qualifying Distributions (see page 25 of the instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:	<u> </u>	
а	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	283,500
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:	ļ	
а	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	283,500
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	ıncome. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	6,657
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	276,843
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foun	dation	

Form 9	990-PF (2009) Evert Foundation c/o John Nelson			41-6	543299 Page 9
Part	XIII Undistributed Income (see page 26 of the	ne instructions)			
1	Distributable amount for 2009 from Part XI,	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
	line 7				258,693
2	Undistributed income, if any, as of the end of 2009:				
а	Enter amount for 2008 only	 		276,621	18835
b	Total for prior years: 20, 20, 20	 	0	.	S. C.
3	Excess distributions carryover, if any, to 2009:				
a	From 2004		`		
ь	From 2005				
C	From 2006				
đ	From 2007		^		
6	From 2008				
T	Total of lines 3a through e	U		, , ,	
4	Qualifying distributions for 2009 from Part XII, line 4: \$\simes \$\frac{283,500}{}\$				35,
	Applied to 2008, but not more than line 2a			276,621	
	Applied to undistributed income of prior years	······································		270,021	×*./
-	(Election required—see page 26 of the instructions) .	*	0		. 15 je
С	Treated as distributions out of corpus (Election				**************************************
	required—see page 26 of the instructions)	0			***
d	Applied to 2009 distributable amount				6,879
6	Remaining amount distributed out of corpus	0			
5	Excess distributions carryover applied to 2009	0			0
	(If an amount appears in column (d), the same amount must be shown in column (a).)		٠		
6	Enter the net total of each column as indicated below:				
а	Corpus. Add lines 3f, 4c, and 4e Subtract line 5	0			
	Prior years' undistributed income. Subtract			*,	
	line 4b from line 2b		l 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				1
d	Subtract line 6c from line 6b. Taxable			**	
	amount—see page 27 of the instructions	· · · · · · · · · · · · · · · · · · ·	0		
6	Undistributed income for 2008. Subtract line	*	Ť		
	4a from line 2a. Taxable amount—see page 27 of the	*	*		
	instructions			0	~ '
f	Undistributed income for 2009. Subtract	*		*	
	lines 4d and 5 from line 1. This amount must				
_	be distributed in 2010		, ,	· · · · · · · · · · · · · · · · · · ·	251,814
7	Amounts treated as distributions out of		,		
	corpus to satisfy requirements imposed by				
	section 170(b)(1)(F) or 4942(g)(3) (see page 27 of				3 (4) 3 34
0	the instructions)				,
8	Excess distributions carryover from 2004			,	
	not applied on line 5 or line 7 (see page 27 of the	0		,	
9	instructions)	0		×	333
3	Subtract lines 7 and 8 from line 6a	0	, ,	e no de de	
10	Analysis of line 9:	υ			The results
а	Excess from 2005	·	16 10		21
b	Excess from 2006 0		3) }= '		
c	Excess from 2007 0	,		-	
d	Excess from 2008				
	Excess from 2009 0				

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Pai	rt XIV Private Operating Foun	dations (see	e page 27 of the	e instruction <u>s</u> ar	nd Part VII-A, qu	estion 9)	N/A
1 a	If the foundation has received a ruling foundation, and the ruling is effective				▶		
							4942(J)(5)
2 a	Enter the lesser of the adjusted net income from Part I or the minimum		(a) Tatal				
	investment return from Part X for each	, [_	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
	year listed		0	0	0	0	0
	9 85% of line 2a		0	0	0	0	0
С	Qualifying distributions from Part XII, line 4 for each year listed		0	o	o	o	0
d	Amounts included in line 2c not used for active conduct of exempt activities	· ·					0
8	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c		0	0	0	0	0
3 a	Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test—enter						
	(1) Value of all assets	崖					0
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i) .						0
b	"Endowment" alternative test—enter 2 of minimum investment return shown Part X, line 6 for each year listed	ın	0	0	0	0	0
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)						0
	(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						0
	from an exempt organization . (4) Gross investment income	—					0
D۵	art XV Supplementary Inform	ation (Com	ploto this part	only if the four	adation had \$5	000 or more in	0
Га	assets at any time dur	ng the year	—see page 28	_	•		
1	Information Regarding Foundation						
а	 List any managers of the foundation we before the close of any tax year (but only the content of t				•	the foundation	
b	List any managers of the foundation v ownership of a partnership or other er					ortion of the	
2	Information Regarding Contribution Check here ▶ ☒ if the foundation unsolicited requests for funds. If the founder other conditions, complete item	only makes co oundation make	ontributions to pres es gifts, grants, etc	elected charitable o	organizations and do		ons
а	The name, address, and telephone nu	ımber of the pe	erson to whom app	lications should be a	addressed:		
b	The form in which applications should	be submitted a	and information and	d materials they sho	ould include:		
С	Any submission deadlines:						
d	Any restrictions or limitations on awar factors	ds, such as by	geographical areas	s, charitable fields, l	kinds of institutions,	or other	

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Y		r Future Pay	yment	·
Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
a Paid during the year			0	
St. Mary's University of MN		Public Charit	General Use of the	50.000
2500 Park Avenue Minneapolis MN 55404		Public Charity	General Use of the	50,000
Boston Trinity Academy 17 Hale Street Boston MA 02136		Public Charit		50,000
Metropolitan Economic Development Assn.		Public Chart	General Use of the	30,000
250 Second Avenue South, #106 Minneapolis MN 554		Public Charity		5,000
MS Society		T ublic Chart	General Use of the	3,000
200 12th Avenue S Minneapolis MN 55415		Public Charity		3,000
Valley Arthletic Organization		l abilo oriari	General Use of the	3,555
14599 Hayes Road Apple Valley MN 55124		Public Charity		5,000
JJ Hill Ethics Center			General Use of the	2,000
80 W. Fourth Street Saint Paul MN 55102		Public Charity		50,000
Children's Theatre Company			General Use of the	,
2400 3rd Avenue S Minneapolis MN 55404		Public Charit		10,000
Caring and Sharing Hands			General Use of the	•
525 North 7th Street Minneapolis MN 55405		Public Charit		10,000
Linden Hills Chamber Orchestra			General Use of the	
4031 Sheridan Avenue South Minneapolis MN 55410		Public Charit		5,500
Lutheran Social Services			General Use of the	
2485 Como Avenue Saint Paul MN 55108		Public Charit		10,000
Edina a Better Chance			General Use of the	•
6754 Valley View Road Edina MN 55439		Public Charit		10,000
Salvation Army			General Use of the	,
2445 Prior Avenue North Roseville MN 55113		Public Charit	Charity	10,000
VEAP			General Use of the	•
9728 Irving Avenue South Bloominton MN 55431		Public Charit	Charity	10,000
NAMI MN			General Use of the	
800 Transfer Road, #31 Saint Paul MN 55114		Public Charit	Charity	10,000
Second Harvest Heartland			General Use of the	
1140 Gervais Avenue Saint Paul MN 55109		Public Charit	Charity	10,000
Union Gospel Mission			General Use of the	
77 East 9th Street Saint Paul MN 55101		Public Charit	Charity	10,000
Total See Attached Statement	<u> </u>		▶ 3a	283,500
b Approved for future payment	<u> </u>		Ja	203,300
2 Approved for fatare payment				
				O
				0
			1	0
				v
				·
				C
				C
				C C
				(
				c c
				0
				0 0
				0

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Enter gross amounts unless otherwise indicated.	Unrelated bus	iness income	Excluded by section	- '''		
1 Program service revenue:	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See page 28 of the instructions)	
a		0		0	C	
b		0		0	C	
С	_	0		0	C	
d		0		0	C	
e		0		0	C	
f	_	0		0	C	
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments			14	74		
4 Dividends and interest from securities			14	154,108		
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			18	525,390		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue: a		0		0	_	
b		0		0		
c		0		0		
d		0		0		
•		0		0		
12 Subtotal. Add columns (b), (d), and (e)		0	L	679,572		
13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions on page 28 to verify calcu				13	679,572	
Part XVI-B Relationship of Activities to the Acc		of Evennt D	urnosos			
Line No. Explain below how each activity for which income				nnortantly to		
the accomplishment of the foundation's exempt p page 28 of the instructions.)					_	
					_	
		<u> </u>				
						
					 	
-						
	-			-		
		·				

Firm's name (or yours if

self-employed), address,

Fredrikson & Byron

200 S. Bih Street, #4000, Minneapolis, MN 55402

Form 980-PF (2009)

Evert Foundation c/o John Nelson

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable

Exempt Organizations

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: 14(1) (2) Other assets 1a(2) X b Other transactions: (1) Sales of essets to a noncharitable exempt organization 16(1) (2) Purchases of assets from a noncharitable exempt organization 1b(2) 1b(3) 15(4) (5) Loans or loan guarantees 16(5) (6) Performance of services or membership or fundraising solicitations 15(6) c Sharing of facilities, equipment, mailing lists, other assets, or paid employees d If the answer to eny 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. (a) Line no (b) Amount Involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing errangements Q 0 Q 0 0 Ò 0 0 0 0 0 O 0 0 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 X No b If 'Yes," complete the following schedule. (a) Name of organization (b) Type of organization (c) Description of relationship Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and ballet, it is true, correct, and complete. Declaration of preparer (other than texpayer or fishclary) is based on all information of which preparer has any knowledge. ndssen Here Signature of officer of trust Date Sign Preparer's loantifying Check if number (see Signature on Preparer's self-employed > page 30 of the instructions) signature 5/14/2010

Form 990-PF (2009)

Phone no. (612) 492-7000

EIN -

Schedule B (Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Schedule of Contributors

Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2009

Name o	f the organization		Employer identification number					
Evert F	oundation c/o John N	Velson		41-6543299				
Organi	Organization type (check one):							
Filers o	Filers of: Section:							
Form 9	90 or 990-EZ	501(c)()	(enter number) organization					
		4947(a)(1) none	xempt charitable trust not treated as a private f	oundation				
		527 political org	anization					
Form 9	90-PF	X 501(c)(3) exemp	t private foundation					
		4947(a)(1) nonexempt charitable trust treated as a private foundation						
		501(c)(3) taxable	e private foundation					
	Only a section 501(c)(ral Rule or a Special Rule. ation can check boxes for both the General Rul	e and a Special Rule. See				
Genera	al Rule							
	_	iling Form 990, 990-E ne contributor. Comple	Z, or 990-PF that received, during the year, \$5,0 ete Parts I and II.	000 or more (in money or				
Specia	l Rules							
	sections 509(a)(1) ar	id 170(b)(1)(A)(vi), an	form 990 or 990-EZ that met the 33 1/3 % support of the support of	year, a contribution of the greater				
_	For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use <i>exclusively</i> for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.							
	For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Do not complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year							
Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it must answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).								

	(Form 990, 990-EZ, or 990-PF) (2009) rganization	· · · · · · · · · · · · · · · · · · ·	Page 1 of 1 of Part Employer identification number
•	indation c/o John Nelson		41-6543299
Part I	Contributors (see instructions)		
(a)	(b)	(c)	(d)
No.	Name, address, and ZIP + 4	Aggregate contributions	Type of contribution
1	Lindsay and Ann McCabe 5321 Minnehaha Boulevard Edina MN 55424-1406 Foreign State or Province: Foreign Country:	\$ 603,360	Person Payroll Noncash X (Complete Part II if there is a noncash contribution.)
(a)	(b)	(c)	(d)
No.	Name, address, and ZIP + 4	Aggregate contributions	Type of contribution
2	Foreign State or Province: Foreign Country	\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a)	(b)	(c)	(d)
No.	Name, address, and ZIP + 4	Aggregate contributions	Type of contribution
3	Foreign State or Province: Foreign Country:	\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a)	(b)	(c)	(d)
No.	Name, address, and ZIP + 4	Aggregate contributions	Type of contribution
4	Foreign State or Province: Foreign Country:	\$0_	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a)	(b)	(c)	(d)
No.	Name, address, and ZIP + 4	Aggregate contributions	Type of contribution
5	Foreign State or Province: Foreign Country:	\$0	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a)	(b)	(c)	(d)
No.	Name, address, and ZIP + 4	Aggregate contributions	Type of contribution
6	•••••••••••••••••••••••••••••••••••••••	\$ 0	Person Payroll Noncash

Foreign State or Province:
Foreign Country:

(Complete Part II if there is a noncash contribution.)

Name of organization

Evert Foundation c/o John Nelson

Employer identification number

41-6543299

Part II	Noncash	Property	(see instructions)
---------	---------	----------	--------------------

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	20,151 Shares of United Parcel Service common stock	\$ 601,990	9/17/2009
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$0	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$ <u>o</u>	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$ <u>o</u>	

Line 6 (990-PF) - Gain/Loss from Sale of Assets Other Than Inventory

	E2E 200	323,330	0	•			Depreciation										
Net Gain	or Loss			ise ord	2 g	-e-											
				Expense	Cost of	Impro	men										
Cost, Other	Basis and Expenses	200,900	0	oloo Broth O so too	field only)	Donated	Value						•				
Cost,	Basis and			•	(Enter one		Cost	368,903	0								
Gross	Sales	027,450	0	!		Gross Sales	Price	876,990	17,303								
Gre	Sa					Date	Sold										
Totals	Contraction	caninas	Other sales			Acquisition	Method								-		
						Date	Acquired										
				7: "\" \004\"	Purchaser	ISa	Business										
							Purchaser										
	חונ						CUSIP #										
•	Amount						Sno										
	Joseph Harter C. O. C. March 1997	SHORINGINS OF	Short Term CG Distributions				iption	Securities	stributions								
	7 m 2 T		Short Term C				Description	Publicly Traded Securities	Capital Gains Distributions								
					Check "X"	if Sale of		×	×								
						_	Index	-	2	3	4	2	9	7	8	6	10

Line 16a (990-PF) - Legal Fees

		010 1			
		0/8/1	0	0	
					Disbursemer
		Revenue and			for Charitable
	Name of Organization or	Expenses per	Net Investment	Adjusted Net	Purposes
	Person Providing Service	Books	Income	Income	(Cash Basis On
1	Fredrikson & Byron	1,370			
2					
3					
4					
2					
9					
7					
8					
6					
10					

Line 16c (990-PF) - Other Fees

0	Disbursements for Charitable	Purposes	Call Design Cliny									
0	_ -	Adjusted Net										
12,244				12,244								
4		Net Investment		4								
12,244	Revenue and	Expenses per	SUCCE	12,244								
			WCM - Investment Management Fees	Deloitte & Touche Investment Manageme								
			-	7	3	4	2	9	7	8	6	40

Line 18 (990-PF) - Taxes

		5,196	1,638	0	
		Revenue			Disbursements
		and Expenses	Net Investment	Adjusted	for Charitable
	Description	per Books	Income	Net Income	Purposes
1	Real estate tax not included in line 20				
2	Tax on investment income	3,558			
3	Income tax				
4	Foreign tax	1,638	1,638		
2					
9					
7					
8					
6					
10		-			

Part II, Line 10b (990-PF) - Investments - Corporate Stock

		-	2	3	4	2	9	7	8	6	10	11	12	13	14	15	16	-
	Description	Schwab Account																
3	Num. Shares/ Face Value												-					
5,678,141	Book Value	5,678,141																
3,978,270	Book Value Fnd of Year	3,978,270																
	FMV Beg. of Year	4,496,107																
	Find of Year																	

Part II, Line 10c (990-PF) - Investments - Corporate Bonds

Part IV (990-PF) - Capital Gains and Losses for Tax on Investment Income

		Amount												
	Long Term CG Distributions)	0											•
	Short Term CG Distributions)	0		Totals		894,293	0	368,903	3 525,390	0	0	0	525,390
L						ซ	Gross		Cost or Other		FMV	Adjusted Basis		Gains Minus Excess
		_	How	Date	Date	Sa	Sales	Depreciation	Basis Plus		as of	as of	Excess of FMV	Excess of FMV of FMV Over Adjusted
	Kind(s) of Property Sold	CUSIP #	Acquired	Acquired Acquired	Sold	4	Price		Expense of Sale	Loss	12/31/69	12/31/69	Over Adj Basis	Basis or Losses
-	Publicly Traded Secunties						876,990	٥	368,90				o	280'809
7	Capital Gains Distributions						17,303	0)	17,303			0	17,303
က							0	0)	0			0	0
4							0	3		0			0	0
2							0	0)	0 0			0	0
9							0	J)	0			0	0
7							0	3)	0			0	0
8							0	3)	0 0			0	0
6							0	2)	0			0	0
10							0	3)	0			0	0

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year Recipient(s) paid during the year Name Person Business Community Emergency Services Street 1900 11th Avenue South State Zip code Foreign Country City 55404 MN Minneapolis Relationship Foundation Status **Public Charity** Purpose of grant/contribution Amount General Use of the Charity 10,000 Name **VA Research Services** Person Business Street One Veterans Drive State Zip code Foreign Country City 55417 MN Minneapolis Foundation Status Relationship **Public Charity** Purpose of grant/contribution Amount General Use of the Charity 10.000 Name Person Business **Dunwoody College of Technology** Street 818 Dunwoody Boulevard State Zip code Foreign Country City MN 55403 Minneapolis Foundation Status Relationship **Public Charity** Purpose of grant/contribution Amount General Use of the Charity 5,000 Name Person Business Street City State Zip code Foreign Country Relationship Foundation Status Purpose of grant/contribution Amount 0 Name Person Business Street City State |Zip code Foreign Country Relationship Foundation Status Purpose of grant/contribution Amount 0 Name Person Business Street City State Foreign Country Zip code Relationship Foundation Status Purpose of grant/contribution Amount 0