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Form **990-PF**

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

OMB No 1545-0052

2009Department 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

Getsch Charitable Trust

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

P.O. Box 385258

Room/suite

City or town, state, and ZIP code

Bloomington**MN 55438-5258**

A Employer identification number

45-0510351

B Telephone number (see page 10 of the instructions)

952-897-3863C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the
85% test, check here and attach computation ☐E If private foundation status was terminated under
section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination
under section 507(b)(1)(B), check here ☐H Check type of organization ☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end

of year (from Part II, col (c),

line 16) **\$ 2,521,223**

J Accounting method

☐ Cash ☒ Accrual☐ Other (specify)

(Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses (Thetotal of amounts in columns (b), (c), and (d) may not necessarily equal
the amounts in column (a) (see page 11 of the instructions))(a) Revenue and
expenses per
books(b) Net investment
income(c) Adjusted net
income(d) Disbursements
for charitable
purposes
(cash basis only)

		(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 (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	19,491	19,491	19,491	
	4 Dividends and interest from securities	44,208	44,208	44,208	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-146,840			
	b Gross sales price for all assets on line 6a	1,349,148			
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain			27,825	
	9 Income modifications				
	10a Gross sales less returns & allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	-83,141	63,699	91,524	
	13 Compensation of officers, directors, trustees, etc.	12,000			12,000
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits	918			918
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	700			700
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	446	446	446	
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	8,974	8,974	8,974	8,974
	24 Total operating and administrative expenses. Add lines 13 through 23	23,038	9,420	9,420	22,592
	25 Contributions, gifts, grants paid	109,300			109,300
	26 Total expenses and disbursements. Add lines 24 and 25	132,338	9,420	9,420	131,892
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-215,479			
	b Net investment income (if negative, enter -0-)		54,279		
	c Adjusted net income (if negative, enter -0-)			82,104	

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

Form **990-PF** (2009)

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STATE 1

STATE 2

STATE 3

Part II Balance Sheets		Beginning of year (a) Book Value	End of year	
			(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	962	4,050	4,050
	2 Savings and temporary cash investments	46,781	6,849	6,849
	3 Accounts receivable ♦ Less allowance for doubtful accounts ♦	7,288		
	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 page 16 of the instructions)			
	7 Other notes and loans receivable (attach schedule) ♦ Less allowance for doubtful accounts ♦			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	3,361	214	
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule) See Stmt 4	1,510,403	1,525,935	1,711,269
	c Investments—corporate bonds (attach schedule) See Stmt 5	936,653	755,196	799,055
	11 Investments—land, buildings, and equipment basis ♦ Less accumulated depreciation (attach sch) ♦			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
Liabilities	14 Land, buildings, and equipment basis ♦ Less accumulated depreciation (attach sch) ♦			
	15 Other assets (describe ♦)			
	16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	2,505,448	2,292,244	2,521,223
	17 Accounts payable and accrued expenses		33	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ♦)			
	23 Total liabilities (add lines 17 through 22)	0	33	
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			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	2,505,448	2,292,211	
	30 Total net assets or fund balances (see page 17 of the instructions)	2,505,448	2,292,211	
	31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	2,505,448	2,292,244	

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	2,505,448
2 Enter amount from Part I, line 27a	2	-215,479
3 Other increases not included in line 2 (itemize) ♦ See Statement 6	3	2,800
4 Add lines 1, 2, and 3	4	2,292,769
5 Decreases not included in line 2 (itemize) ♦ See Statement 7	5	558
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,292,211

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 See Attached Schedule		D	Various	Various
b See Attached Schedule		D	Various	Various
c Acct 303-26585				
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 276,011		248,186	27,825
b 1,073,137		1,247,802	-174,665
c			
d			
e			

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

(i) FMV 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			27,825
b			-174,665
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**-146,840****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 pages 13 and 17 of the instructions).

If (loss), enter -0- in Part I, line 8

3**27,825****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 page 18 of 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 (col (b) divided by col (c))
2008			
2007			
2006			
2005			
2004			

2 Total of line 1, column (d)**2****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****4** Enter the net value of noncharitable-use assets for 2009 from Part X, line 5**4****5** Multiply line 4 by line 3**5****6** Enter 1% of net investment income (1% of Part I, line 27b)**6****7** Add lines 5 and 6**7****8** Enter qualifying distributions from Part XII, line 4**8**

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 on page 18

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the 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)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	1,086
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	1,086
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	1,086
6	Credits/Payments		
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	1,300
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	1,300
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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	214
11	Enter the amount of line 10 to be: Credited to 2010 estimated tax 214 Refunded	11	

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 page 19 of the 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 \$ _____ (2) On foundation managers \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____		
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 page 19 of the instructions) MN		
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 on page 27)? 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

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 page 20 of the instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ♦ N/A	13	X	
14	The books are in care of ♦ David Getsch 10202 Berkshire Rd. Located at ♦ Bloomington, MN	Telephone no ♦ 952-897-3863 ZIP+4 ♦ 55437		
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		♦ <input type="checkbox"/>

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 checked="" type="checkbox"/> Yes	<input 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		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?		N/A
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? If "Yes," list the years ♦ 20 , 20 , 20 , 20	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
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 page 20 of the instructions)		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 ♦ 20 , 20 , 20 , 20		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)		N/A
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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 page 22 of the instructions)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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 page 22 of the instructions)?	N/A		5b
	Organizations relying on a current notice regarding disaster assistance check here	<input checked="" type="checkbox"/>		
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 <input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A		7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the 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
See Statement 8				

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the 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				

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

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 page 23 of the 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**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 (see page 24 of the 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	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3	



Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, 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.		
a	Average monthly fair market value of securities	1a	2,309,162
b	Average of monthly cash balances	1b	29,321
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	2,338,483
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	2,338,483
4	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	35,077
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,303,406
6	Minimum investment return. Enter 5% of line 5	6	115,170

Part XI Distributable Amount (see page 25 of the 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	115,170
2a	Tax on investment income for 2009 from Part VI, line 5	2a	1,086
b	Income tax for 2009 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,086
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	114,084
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	114,084
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	114,084

Part XII Qualifying Distributions (see page 25 of the 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	131,892
b	Program-related investments—total from Part IX-B	1b	
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	131,892
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 page 26 of the instructions)	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	131,892

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 page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				114,084
2 Undistributed income, if any, as of the end of 2009.				
a Enter amount for 2008 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2009				
a From 2004	22,990			
b From 2005	3,709			
c From 2006				
d From 2007	5,337			
e From 2008				
f Total of lines 3a through e	32,036			
4 Qualifying distributions for 2009 from Part XII, line 4 ♦ \$ 131,892				
a Applied to 2008, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
d Applied to 2009 distributable amount				114,084
e Remaining amount distributed out of corpus	17,808			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	49,844			
b Prior years' undistributed income. Subtract line 4b from line 2b				
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				
d Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions				
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions				
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 page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	22,990			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	26,854			
10 Analysis of line 9				
a Excess from 2005	3,709			
b Excess from 2006				
c Excess from 2007	5,337			
d Excess from 2008				
e Excess from 2009	17,808			

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

Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)					
a Paid during the year Schedule Attached		None		Attached	109,300
Total					◆ 3a 109,300
b Approved for future payment N/A					
Total					◆ 3b

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Indirect Accounting Fees	\$ 700	\$	\$	\$ 700
Total	\$ 700	\$ 0	\$ 0	\$ 700

Statement 2 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
MN Filing Fee	\$ 25	\$ 25	\$ 25	\$
Foreign Taxes	421	421	421	
Total	\$ 446	\$ 446	\$ 446	\$ 0

Statement 3 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Expenses				
Supplies	111	111	111	111
P.O. Box Rental				
Bank Service Charges	65	65	65	65
Postage	33	33	33	33
Guidestar Services				
Miscellaneous				
Investment Fees				
RBC Investment Fees	8,765	8,765	8,765	8,765
Total	\$ 8,974	\$ 8,974	\$ 8,974	\$ 8,974

Federal Statements

Statement 4 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
Acct 26585 US Equities	\$ 1,469,823	\$ 1,424,208	Cost	\$ 1,355,281
Acct 26585 International Equities	194,631	304,378	Cost	355,988
Acct 26585 Other Assets	81,164		Cost	
Balance Adjustment	-235,215	-202,651	Cost	
Total	\$ <u>1,510,403</u>	\$ <u>1,525,935</u>		\$ <u>1,711,269</u>

Statement 5 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
Acct 584 Fixed income fund	\$ 879,000	\$ 293,000	Cost	\$ 296,944
Acct 585 Fixed income fund	57,653	462,196	Cost	502,111
Total	\$ <u>936,653</u>	\$ <u>755,196</u>		\$ <u>799,055</u>

Statement 6 - Form 990-PF, Part III, Line 3 - Other Increases

Description	Amount
Timing Difference with brokerage acccts	\$ 2,800
Total	\$ <u>2,800</u>

Statement 7 - Form 990-PF, Part III, Line 5 - Other Decreases

Description	Amount
Payment of previous year tax payments	\$ 15
Current year tax payment	543
Total	\$ <u>558</u>

Federal Statements

Statement 8 - Form 990-PF, Part VIII, Line 1 - List of Officers, Directors, Trustees, Etc.

Name and Address	Title	Average Hours	Compensation	Benefits	Expenses
Marjorie D. Getsch P.O. Box 385258 Bloomington MN 55438	Trustee	0.00	0	0	0
Edward W. Getsch P.O. Box 385258 Bloomington MN 55438	Trustee	0.00	0	0	0
John H. Getsch P.O. Box 385258 Bloomington MN 55438	Trustee	0.00	0	0	0
Dianne H. Getsch P.O. Box 385258 Bloomington MN 55438	Trsutee	0.00	0	0	0
Marilyn R. Getsch P.O. Box 385258 Bloomington MN 55438	Trsutee	0.00	0	0	0
David D. Getsch P.O. Box 385258 Bloomington MN 55438	Exec Dir	5.00	12,000	0	0

Statement 9 - Form 990-PF, Part XV, Line 2b - Application Format and Required ContentsDescription

Applications should be in written form with reason for grant or donation.

Statement 10 - Form 990-PF, Part XV, Line 2c - Submission DeadlinesDescription

Applications are accepted at any time. Unsolicited applications are not accepted.

Form 990-PF, Part XV, Line 2d - Award Restrictions or LimitationsDescription

None

Year 2009 Getsch Charitable Trust - Grant Schedule

Organization	Location	Purpose	Grant
Alliance Defense Fund	Scottsdale, AZ	Operations	\$1,000
Answers in Genesis	Hebron, KY	Creation Museum	\$2,000
Augustana Lutheran Church	Minneapolis, MN	CES Food Shelf	\$500
Christian Servicemans Center	Chattanooga, TN	Missionary Support	\$500
Campus Crusade for Christ	Orlando, FL	Missionary Support	\$2,700
Calvary Chapel of Albuquerque	Albuquerque, NM	Missionary Support	\$1,200
Chesterton Academy	Bloomington, MN	Operations	\$2,000
Church of the Open Door	Maple Grove, MN	Operations	\$3,300
Colonial Church of Edina	Edina, MN	Operations	\$200
Evangelical Free Church Mission	Minneapolis, MN	Missionary Support	\$1,000
Franciscan Sisters of Little Falls	Little Falls, MN	Missionary Support	\$2,000
GoodSports International	Springfield, VA	Slovakia Project	\$1,200
GoodSports International	Springfield, VA	Missionary Support	\$5,800
Haiti Outreach	Minnetonka, MN	Operations	\$9,200
Holy Family Catholic Church	St. Louis Park, MN	Operations	\$4,000
International Christian Ministries	Bakersfield, CA	Missionary Support	\$2,500
IFP Minnesota	St. Paul, MN	Film Documentary	\$25,000
Immaculate Heart of Mary Catholic Church	St. Paul, MN	Operations	\$1,000
Integra Ventures USA	Wheaton, IL	Missionary Support	\$7,200
Intl Institute of Christian Studies	Overland Park, KS	Missionary Support	\$500
Janz Team	Buffalo, NY	Missionary Support	\$500
Make Old Things New	Minneapolis, MN	Operations	\$1,000
Metro Womens Center	Crystal, MN	Building Fund	\$5,000
Missionaries of the Poor	Atlanta, GA	Haiti Mission	\$1,000
Navigators	Colorado Springs, CO	Missionary Support	\$500
Notre Dame de LaSalette Boys Academy	Georgetown, IL	Building Fund	\$5,000
Pilgrim Center for Reconciliation	Edina, MN	Operations	\$500
St. Thomas Aquinas Seminary	Winona	Scholarships	\$4,000
Studies in Grace	Edina, MN	Prison Bible Study	\$1,500
Surpassing Grace	Dallas, TX	Missionary Support	\$2,000
Westwood Church	Excelsior, MN	Building Fund	\$12,500
Wycliffe Bible Translators	Orlando, FL	Missionary Support	\$1,000
Young Life	Bloomington, MN	Operations	\$2,000
		Total Grants =	\$109,300

RBC Wealth Management
REALIZED GAINS AND LOSSES
(9getsch) Getsch Tr/Investment
GETSCH CHARITABLE TRUST / INVESTMENT ACCOUNTS
(30326584/30326585-PFS)
From 01-01-09 Through 12-31-09
EIN: 45-0510351

Open Date	Close Date	Quantity	Security	Cost		Price		Gain Or Loss	
				Per Share	Basis	Per Share	Proceeds	Short Term	Long Term
12-16-08	10-27-09	355.240	Allianz NFJ Small Cap Value Cl A	19.07	6,774.43	22.52	8,000.00	1,225.57	
02-05-09	09-08-09	2,155.172	Bond Fund of America Cl F2	10.71	23,081.89	11.60	25,000.00	1,918.11	
12-17-08	06-05-09	18.424	Diamond Hill Focus Long Short Cl I	14.33	264.02	14.66	270.10	6.08	
12-31-08	06-05-09	65.537	Diamond Hill Focus Long Short Cl I	13.73	899.82	14.66	960.77	60.95	
04-09-09	10-05-09	4,786.979	Growth Fund of America Cl F	20.89	100,000.00	25.41	121,637.15	21,637.15	
12-24-08	10-05-09	71.132	Growth Fund of America Cl F	19.69	1,400.58	25.41	1,807.46	406.88	
03-19-09	09-08-09	20.919	Jensen Portfolio Cl J	16.81	351.65	21.76	455.20	103.55	
06-18-09	09-08-09	12.656	Jensen Portfolio Cl J	19.61	248.18	21.76	275.39	27.21	
09-18-08	09-08-09	9.946	Jensen Portfolio Cl J	26.28	261.39	21.76	216.42	-44.97	
11-25-08	09-08-09	147.927	Jensen Portfolio Cl J	18.11	2,678.96	21.76	3,218.89	539.93	
12-22-08	09-08-09	24.008	Jensen Portfolio Cl J	18.89	453.51	21.76	522.42	68.91	
08-18-08	04-09-09	599.161	Touchstone Sm Cap Value Oppty	16.69	10,000.00	10.83	6,488.90	-3,511.10	
12-12-08	04-09-09	0.996	Touchstone Sm Cap Value Oppty	10.82	10.78	10.83	10.79	0.01	
12-31-08	04-09-09	1.064	Touchstone Sm Cap Value Oppty	11.69	12.44	10.83	11.52	-0.92	
02-10-09	07-08-09	337.549	Vanguard Short Term Investment Grade	9.84	3,321.48	10.28	3,470.00	148.52	
02-10-09	07-13-09	281.827	Vanguard Short Term Investment Grade	9.84	2,773.18	10.29	2,900.00	126.82	
02-10-09	07-23-09	7,766.990	Vanguard Short Term Investment Grade	9.84	76,427.18	10.30	80,000.00	3,572.82	
02-10-09	10-21-09	545.492	Vanguard Short Term Investment Grade	9.84	5,367.64	10.57	5,765.85	398.21	
02-10-09	12-08-09	1,230.744	Vanguard Short Term Investment Grade	9.84	12,110.52	10.65	13,107.42	996.90	
02-11-09	12-08-09	177.707	Vanguard Short Term Investment Grade	9.84	1,748.64	10.65	1,892.58	143.94	
Total Short Term Gains					248,186.29		276,010.86	27,824.57	
01-24-05	02-17-09	3,425.200	AllianceBernstein Intl Value Adv Cl	16.14	55,282.73	8.63	29,559.47	-25,723.26	
05-04-06	02-17-09	1,138.952	AllianceBernstein Intl Value Adv Cl	21.95	25,000.00	8.63	9,829.15	-15,170.85	

RBC Wealth Management
REALIZED GAINS AND LOSSES
(9geisch) Geisch Tr/Investment
GETSCH CHARITABLE TRUST / INVESTMENT ACCOUNTS
(30326584/30326585-PFS)
From 01-01-09 Through 12-31-09
45-0510351

Open Date	Close Date	Quantity	Security	Cost Per Share	Cost Basis	Price Per Share	Proceeds	Gain Or Loss	
								Short Term	Long Term
12-18-06	02-17-09	272.095	AllianceBernstein Intl Value Adv Cl	22.52	6,127.59	8.63	2,348.18	-3,779.41	
12-18-06	02-17-09	127.571	AllianceBernstein Intl Value Adv Cl	22.52	2,872.91	8.63	1,100.94	-1,771.97	
12-18-06	02-17-09	58.040	AllianceBernstein Intl Value Adv Cl	22.52	1,307.05	8.63	500.89	-806.16	
12-20-05	02-17-09	225.879	AllianceBernstein Intl Value Adv Cl	18.08	4,083.89	8.63	1,949.34	-2,134.55	
12-20-05	02-17-09	72.998	AllianceBernstein Intl Value Adv Cl	18.08	1,319.80	8.63	629.97	-689.83	
12-20-05	02-17-09	52.338	AllianceBernstein Intl Value Adv Cl	18.08	946.27	8.63	451.68	-494.59	
12-26-07	02-17-09	297.902	AllianceBernstein Intl Value Adv Cl	22.28	6,637.25	8.63	2,570.89	-4,066.36	
12-26-07	02-17-09	126.873	AllianceBernstein Intl Value Adv Cl	22.28	2,826.72	8.63	1,094.91	-1,731.81	
12-26-07	02-17-09	27.054	AllianceBernstein Intl Value Adv Cl	22.28	602.76	8.63	233.48	-369.28	
01-24-05	03-02-09	8,998.989	Ancap Fund Cl F1	17.55	157,932.26	9.89	89,000.00	-68,932.26	
01-24-05	10-21-09	1,113.154	Aston Optimum Mid Cap I	23.17	25,791.78	24.55	27,327.92	1,536.14	
02-01-05	02-10-09	99,000	Badger St Bk Cassville WI CD	100.00	99,000.00	100.00	99,000.00	0.00	
01-28-05	02-04-09	95,000	4.000% Due 02-10-09 Centennial Bank Kingsland AR CD	100.00	95,000.00	100.00	95,000.00	0.00	
01-28-05	02-09-09	99,000	4.000% Due 02-04-09 Cygnat Private Bk Ponte Verdra FL CD	100.00	99,000.00	100.00	99,000.00	0.00	
02-25-08	06-05-09	2,641.310	4.000% Due 02-09-09 Diamond Hill Focus Long Short Cl I	18.93	50,000.00	14.66	38,721.60	-11,278.40	
04-21-08	06-05-09	1,562.500	Diamond Hill Focus Long Short Cl I	19.20	30,000.00	14.66	22,906.25	-7,093.75	
02-01-05	02-17-09	99,000	Equity Bk Dodge Center MN CD	100.00	99,000.00	100.00	99,000.00	0.00	
01-24-05	10-05-09	5,127.134	4.000% Due 02-17-09 Growth Fund of America Cl F	26.13	133,972.00	25.41	130,280.47	-3,691.53	
12-20-06	10-05-09	174,046	Growth Fund of America Cl F	32.85	5,717.42	25.41	4,422.51	-1,294.91	

RBC Wealth Management
REALIZED GAINS AND LOSSES
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GETSCH CHARITABLE TRUST / INVESTMENT ACCOUNTS
(30326584/30326585-PFS)
From 01-01-09 Through 12-31-09

45-0510351

Open Date	Close Date	Quantity	Security	Cost		Price Per Share	Proceeds	Gain Or Loss	
				Per Share	Basis			Short Term	Long Term
12-20-06	10-05-09	46.154	Growth Fund of America Cl F	32.85	1,516.16	25.41	1,172.77		-343.39
12-20-07	10-05-09	335.779	Growth Fund of America Cl F	33.19	11,144.52	25.41	8,532.14		-2,612.38
12-20-07	10-05-09	60.333	Growth Fund of America Cl F	33.19	2,002.44	25.41	1,533.06		-469.38
12-21-05	10-05-09	37.626	Growth Fund of America Cl F	30.66	1,153.61	25.41	956.08		-197.53
12-21-05	10-05-09	32.893	Growth Fund of America Cl F	30.66	1,008.51	25.41	835.81		-172.70
01-28-08	09-08-09	949.127	Jensen Portfolio Cl J	26.34	25,000.00	21.76	20,653.01		-4,346.99
03-25-08	09-08-09	11.641	Jensen Portfolio Cl J	26.28	305.92	21.76	253.31		-52.61
03-27-07	09-08-09	7.015	Jensen Portfolio Cl J	26.83	188.20	21.76	152.65		-35.55
05-04-06	08-26-09	1,203.147	Jensen Portfolio Cl J	24.49	29,465.07	21.61	26,000.00		-3,465.07
05-04-06	09-01-09	802.644	Jensen Portfolio Cl J	24.49	19,656.75	21.18	17,000.00		-2,656.75
05-04-06	09-08-09	1,056.683	Jensen Portfolio Cl J	24.49	25,878.17	21.76	22,993.42		-2,884.75
06-19-08	09-08-09	8.933	Jensen Portfolio Cl J	26.22	234.23	21.76	194.38		-39.85
06-25-07	09-08-09	5.241	Jensen Portfolio Cl J	28.21	147.86	21.76	114.04		-33.82
06-29-06	09-08-09	7.204	Jensen Portfolio Cl J	23.61	170.09	21.76	156.76		-13.33
09-24-07	09-08-09	6.703	Jensen Portfolio Cl J	28.47	190.83	21.76	145.86		-44.97
09-28-06	09-08-09	5.268	Jensen Portfolio Cl J	25.53	134.49	21.76	114.63		-19.86
12-24-07	09-08-09	22.995	Jensen Portfolio Cl J	28.40	653.07	21.76	500.37		-152.70
12-24-07	09-08-09	8.355	Jensen Portfolio Cl J	28.40	237.27	21.76	181.80		-55.47
12-29-06	09-08-09	6.077	Jensen Portfolio Cl J	27.06	164.44	21.76	132.24		-32.20
01-28-05	02-09-09	95,000	Republic Bk Inc Bountiful UT CD	100.00	95,000.00	100.00	95,000.00		0.00
01-28-05	04-08-09	99,000	4.000% Due 02-09-09 Signature Bk NA Toledo OH CD	100.00	99,000.00	100.00	99,000.00		0.00
01-24-05	05-21-09	1,416.900	4.000% Due 04-08-09 T. Rowe Price Mid Cap Value Fund	21.89	31,015.94	15.52	21,990.29		-9,025.65
04-27-06	04-09-09	48.780	Touchstone Sm Cap Value Oppty	20.50	1,000.00	10.83	528.29		-471.71
12-15-06	04-09-09	0.725	Touchstone Sm Cap Value Oppty	20.21	14.65	10.83	7.85		-6.80
12-15-06	04-09-09	0.467	Touchstone Sm Cap Value Oppty	20.21	9.44	10.84	5.06		-4.38
12-19-07	04-09-09	3.785	Touchstone Sm Cap Value Oppty	17.57	66.51	10.83	40.99		-25.52
12-19-07	04-09-09	1.297	Touchstone Sm Cap Value Oppty	17.57	22.79	10.83	14.05		-8.74
12-31-07	04-09-09	0.055	Touchstone Sm Cap Value Oppty	17.82	0.98	10.91	0.60		-0.38

RBC Wealth Management
REALIZED GAINS AND LOSSES
 (9getsch) Getsch Tr/Investment
 GETSCH CHARITABLE TRUST / INVESTMENT ACCOUNTS
 (30326584/30326585-PFS)
 From 01-01-09 Through 12-31-09

45-0510351

Open Date	Close Date	Quantity	Security	Cost Per Share	Cost Basis	Price Per Share	Proceeds	Gain Or Loss	
								Short Term	Long Term
Total Long Term Gains								1,073,137.11	-174,665.28
TOTAL GAINS								31,381.56	1,536.14
TOTAL LOSSES								-3,556.99	-176,201.42
TOTAL REALIZED GAIN/LOSS								27,824.57	-174,665.28
NO CAPITAL GAINS DISTRIBUTIONS									