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Form **990-PF**

Return of Private Foundation

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

Department of the Treasury Internal Revenue Service 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

| 1 Contributions, gifts, grants, etc., received 2 Check | entification number 60789 umber 41-3285 oplication is pending, check here ganizations, check here anizations meeting the 85% test, and attach computation ndation status was terminated in 507(b)(1)(A), check here tion is in a 60-month termination in 507(b)(1)(B), check here |
|--|--|
| Use the IRS label. Otherwise, Print or type. See Specific Instructions. DA Employer identification number 48-1260789 | ## A 1 - 3 2 8 5 **Speciation is pending, check here panizations, check here anizations meeting the 85% test, and attach computation **Indation status was terminated in 507(b)(1)(A), check here toon is in a 60-month termination in 507(b)(1)(B), check here in 507(b)(1)(B), check h |
| The stabel amounts in columns (c), c), and c) may be a consistive to the state and stabes and stabes are the state and stabes and stabes are the state and stabes are the state and stabes are the stabes and stabes are the stabes are the stabes are the stable private foundation. See Specific City or town, state, and ZIP code EDMOND, OK 73034-7075 Differ taxable private foundation Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation Fair market value of all assets at end of year J Accounting method: Cash Accrual (from Part II, col (c), line 16) Accounting method: Cash Accrual (from Part II, col (c), line 16) Analysis of Revenue and Expenses (The total diamounts in columns (c), (c), and (q) may not response to the amounts in columns (c), (c), and (q) may not expenses per books Cash C | umber 41-3285 oplication is pending, check here rganizations, check here anizations meeting the 85% test, and attach computation ndation status was terminated in 507(b)(1)(A), check here tion is in a 60-month termination in 507(b)(1)(B), check here |
| Number and street (or PO box number if mail is not delivered to street address) B Telephone number 1200 WOODY CREEK COURT 405-341-3285 | umber 41-3285 oplication is pending, check here ganizations, check here anizations meeting the 85% test, and attach computation ndation status was terminated n 507(b)(1)(A), check here tion is in a 60-month termination n 507(b)(1)(B), check here |
| See Specific Instructions. EDMOND, OK 73034-7075 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) Set 215, 048. (Part I, column (d) must be on cash basis) I Contributions, gifts, grants, etc., received Contributions, gifts, grants, etc., received Contributions, and temporary a cash investments A Dividends and interest from securities 5 a Gross rents b Net rental income or (loss) 6a Net gain or loss) from sales of company and grants and compositions. Other company and allowances of gross profit or other forms. I Correspondent of the foundation in the foundation of the foundation in | 41-3285 population is pending, check here reganizations, check here and attach computation indation status was terminated in 507(b)(1)(A), check here ton is in a 60-month termination in 507(b)(1)(B), check here |
| See Specific City or town, state, and ZIP code Instructions. EDMOND, OK 73034-7075 H Check type of organization: X Section 501(c)(3) exempt private foundation I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ | poplication is pending, check here rganizations, check here ganizations meeting the 85% test, and attach computation ndation status was terminated in 507(b)(1)(A), check here tion is in a 60-month termination in 507(b)(1)(B), check here |
| Instructions. Cly of twin, State, and In the Embodon of the Company of the Compan | ganizations, check here anizations meeting the 85% test, and attach computation ndation status was terminated in 507(b)(1)(A), check here tion is in a 60-month termination in 507(b)(1)(B), check here |
| EDMOND, OK 73034-7075 1. Foreign organizations, check here 2. Foreign organizations, check here and attach computation 2. Foreign organizations check here and attach computation 2. Foreign organizations check here and attach computation 2. Foreign organizations check here and attach computation 2. Foreign organization 2. Foreign o | ndation status was terminated n 507(b)(1)(B), check here |
| Section 4947(a)(1) nonexempt charitable trust | ndation status was terminated n 507(b)(1)(A), check here tion is in a 60-month termination n 507(b)(1)(B), check here |
| Fair market value of all assets at end of year (from Part II, col (c), line 16) | tion is in a 60-month termination 507(b)(1)(B), check here |
| Other (specify) | tion is in a 60-month termination n 507(b)(1)(B), check here |
| Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in columns (b), (c), and (d) may not expenses per books (the total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) 1 Contributions, gifts, grants, etc., received 2 Check Interest on savings and temporary cash massing interest on savings and temporary cash investments 4 Dividends and interest from securities 5 2, 434. N/A 1 Dividends and interest from securities 5 3, 638. STATEMENT 5 4 Oross rents 5 Net rental income or (loss) 6 Net gain or (lofs) from salest passets not on line 10 5 Gross sales pice for all INCEPTIVED 9 Income modifications 10 and allowences 10 Other innoome 11 Other innoome | n 507(b)(1)(B), check here |
| Contributions, gifts, grants, etc., received S2, 434. | /4\ |
| The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) 1 Contributions, girts, grants, etc., received 2 Check Interest on savings and temporary cash investments 4 Dividends and interest from securities 5 A Gross rents b Net rental income or (loss) 6a Net gain or (loss) from saving seats not on line 10 Caross sales price for all NECEIVED 7 Capital gain propriome (from Partiv-Line 2) 9 Income modifications 10a and allowances Caross profit or (loss) 11 Other income | ad not IUID:sbursements |
| 1 Contributions, gifts, grants, etc., received 2 Check | for charitable purposes |
| 2 Check Interest on savings and temporary cash investments 4 Dividends and interest from securities 5,638. STATEMENT 5a Gross rents b Net rental income or (loss) 6a Net gain or (loss) from saving assets not on line 10 b assets on line 5a 7 Capital gain repricome (from Partivious) 9 Income modifications Gross sales less returns 10a and allowances b Less Cost of gooths and DEN, UT c Gross profit or (loss) 11 Other income | |
| Dividends and interest from securities 5,638. 5,638. STATEMENT 5a Gross rents b Net rental income or (loss) 6a Net gain or (loss) from sate of resets not on line 10 Gross sales price for all CCEIVED 7 Capital gain respiratore (from Part IV, line 2) 8 Net short-frem capital gain 9 Income modifications 10a and allowances b Less Cost of goods sold DEN, UT 10 CGross profit or (loss) 11 Other income | |
| 4 Dividends and interest from securities 5 a Gross rents b Net rental income or (loss) 6 a Net gain or (loss) from sale prasects not on line 10 b assets on line 6a 7 Capital gain repriceme (from Partiv-Line 2) 8 Net short-ferm capital gain 9 Income modifications 10a and allowances b Less Cost of goods-calls 11 Other income | |
| b Net rental income or (loss) 6a Net gain or (loss) from salest seets not on line 10 Gross sales price for all CETVED 7 Capital gain represent (from Part IV, line 2) 8 Net short-ferm capital gain 9 Income modifications Gross sales less returns 10a and allowances b Less Cost of goods colo DEN, UT c Gross profit or (loss) 11 Other income | STATEMENT 1 |
| 6a Net gain or (loss) from sape passets not on line 10 6 a Net gain or (loss) from sape passets not on line 10 6 a Set gain or (loss) from sape passets not on line 10 7 Capital gain repricome (from Partiv, line 2) 8 Net short-ferm capital gain 9 Income modifications 10a and allowances b Less Cost of goods colo DEN, UT c Gross profit or (loss) 11 Other income | - |
| b Gross sales price for all NECEIVED 7 Capital gain periodic from Part IV-line 2) 8 Net short ferm capital pain 9 Income modifications Gross sales less returns 10a and allowances b Less Cost of goods call DEN, UT c Gross profit or (loss) 11 Other income | |
| 9 Income modifications 10a and allowances OCDEN, UT c Gross profit or (loss) 11 Other income | |
| 9 Income modifications 10a and allowances OCDEN, UT c Gross profit or (loss) 11 Other income | |
| 9 Income modifications 10a and allowances OCDEN, UT c Gross profit or (loss) 11 Other income | · |
| c Gross profit or (loss) 11 Other income | |
| b Less Cost of goods sold UEN, c Gross profit or (loss) 11 Other income | |
| c Gross profit or (loss) 11 Other income | |
| 11 Other income | |
| | |
| 12 Total. Add lines 1 through 11 58,072. 5,638. | , |
| | 0. |
| 14 Other employee salaries and wages | |
| 15 Pension plans, employee benefits | |
| % 16a Legal fees | |
| b Accounting fees STMT 2 813. 407. | 406. |
| C Other professional fees | |
| Truncation of the second of th | |
| 18 Taxes STMT 3 259. 0. | 0. |
| Depreciation and depletion CE 20 Occupancy | <u>'</u> |
| 21 Travel, conferences, and meetings | |
| SE 22 Printing and publications | |
| 23 Other expenses STMT 4 209. 209. | 0. |
| 24 Total operating and administrative | |
| expenses. Add lines 13 through 23 1, 281. 616. 406 | 406. |
| 25 Contributions, gifts, grants paid 3,700. | 3,700. |
| 26 Total expenses and disbursements. | |
| Add lines 24 and 25 . 4,981. 616. 4,106 | 4,106. |
| b Accounting fees STMT 2 813. 407. 400 c Other professional fees 17 Interest 18 Taxes STMT 3 259. 0. (19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses STMT 4 209. 209. (19 Total operating and administrative expenses. Add lines 13 through 23 1, 281. 616. 406 25 Contributions, gifts, grants paid 3, 700. 3, 700 26 Total expenses and disbursements. Add lines 24 and 25 4, 981. 616. 4, 106 27 Subtract line 26 from line 12: | |
| a Excess of revenue over expenses and disbursements 33,031. | |
| b Net investment income (if negative, enter -0-) | |
| c Adjusted net income (if negative, enter -0-) | • |

| | art | Balance Sheets Attached schedules and amounts in the description | Beginning of year | End of | year |
|---------------|-------|---|-------------------|----------------|---------------------------|
| | ait | column should be for end-of-year amounts only | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| | 1 | Cash - non-interest-bearing | | | |
| | 2 | Savings and temporary cash investments | 26,104. | 25,123. | 24,338. |
| | 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 | | ' | 1 |
| | ' | Less: allowance for doubtful accounts | | | |
| ' 0 | 8 | Inventories for sale or use | | | |
| Assets | 1 - | • | | | |
| Ass | 9 | Prepaid expenses and deferred charges | | | |
| - | l | Investments - U.S and state government obligations | 104 114 | 156 540 | 100 105 |
| | 1 | Investments - corporate stock STMT 5 | 104,114. | 156,548. | 108,105. |
| | C | Investments - corporate bonds STMT 6 | 132,331. | 133,969. | 82,605. |
| | 11 | Investments - land, buildings, and equipment basis | | , , , , , | |
| | | Less accumulated depreciation | | | |
| | 12 | Investments - mortgage loans | | | |
| | 13 | Investments - other | | | |
| | 14 | Land, buildings, and equipment basis ▶ | | | |
| | | Less accumulated deprecation | | | |
| | 15 | Other assets (describe ►) | | | |
| | | · | | | |
| | 16 | Total assets (to be completed by all filers) | 262,549. | 315,640. | 215,048. |
| | 17 | Accounts payable and accrued expenses | | | |
| | 18 | Grants payable | | | - |
| (D | 19 | Deferred revenue | | | |
| Liabilities | 20 | · · · · · · · · · · · · · · · · · · · | | | |
| Ξ | | Loans from officers, directors, trustees, and other disqualified persons Mortgages and other notes payable | | | |
| Lia | 21 | | | | |
| | 22 | Other liabilities (describe) | | | - |
| | 0.2 | Total liabilities (add lines 17 through 22) | 0. | 0. | • |
| | 23 | Foundations that follow SFAS 117, check here | | | • |
| | | , | | | |
| es | | and complete lines 24 through 26 and lines 30 and 31. | | | |
| nce | | Unrestricted | | ······ | |
| ala | 25 | Temporarily restricted | | | |
| 18 | 26 | Permanently restricted | | | |
| Fund Balanc | | Foundations that do not follow SFAS 117, check here | | | |
| Ľ. | | and complete lines 27 through 31. | | | , |
| ß | 27 | Capital stock, trust principal, or current funds | 0. | 0. | ; |
| Se | 28 | Paid-in or capital surplus, or land, bldg., and equipment fund | 0. | 0. | ; |
| Ϋ́ | 29 | Retained earnings, accumulated income, endowment, or other funds | 262,549. | 315,640. | |
| Net Assets or | 30 | Total net assets or fund balances | 262,549. | 315,640. | 1 |
| | | | } | 1 | ı |
| | 31 | Total liabilities and net assets/fund balances | 262,549. | 315,640. | |
| P | art | Analysis of Changes in Net Assets or Fund Ba | alances | | |
| - | Total | not poorte or fund halances at hagyanage of year. Don't li column (a) line (| 00 | | |
| | | net assets or fund balances at beginning of year - Part II, column (a), line 3 | JU | | 262 640 |
| | | t agree with end-of-year figure reported on prior year's return) | | 1 | 262,549. |
| | | amount from Part I, line 27a | • • • | 2 | 53,091. |
| | | increases not included in line 2 (itemize) | | 3 | 0. |
| | | nes 1, 2, and 3 | | 4 | 315,640. |
| | | ases 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, co | umn (b), line 30 | | 315,640. |
| | | | | | Form 990-PF (2009) |

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RULEWICZ FOUNDATION

| | ribe the kind(s) of property arehouse; or common stock | | | (b) How acquired P - Purchase D - Donation | (c) Date acquired (mo., day, yr.) | d (d) Date sold (mo., day, yr.) |
|--|---|---|--------------------------------------|--|---------------------------------------|---------------------------------|
| <u>1a</u> | | | | | | |
| b NO | NE | | | | | |
| <u>c</u> | | | | | · · · · · · · · · · · · · · · · · · · | - |
| <u>d</u> e | | | | | | |
| (e) Gross sales price | (f) Depreciation allov (or allowable) | | st or other basis expense of sale | | (h) Gain or (le (e) plus (f) min | |
| <u>a</u> | | | | | | |
| b | | | | | | |
| C | | | | | | |
| <u>d</u> | | | | | | |
| Complete only for assets shown | no gain in column (h) and o | wned by the foundation | n on 12/31/69 | | (I) Gains (Col. (h) g | ain miniis |
| | (j) Adjusted basis | | xcess of col. (1) | | ol. (k), but not less | than -0-) or |
| (i) F.M.V. as of 12/31/69 | as of 12/31/69 | | col. (j), if any | | Losses (from co | ol. (h)) |
| a | | | | | | |
| b | | | | | | |
| C | | | | | | |
| d | | | | | | |
| e | | | | | | |
| 2 Capital gain net income or (net ca | pital loss) { If gain, a | also enter in Part I, line , enter -0- in Part I, line | 7 : 7 | } 2 | | |
| 3 Net short-term capital gain or (los | • | | | | | |
| If gain, also enter in Part I, line 8, | | ezz(o) and (o). | | <i>)</i> | | |
| If (loss), enter -0- in Part I, line 8 | nder Section 4940 | | |] 3 | | |
| For optional use by domestic private | foundations subject to the | section 4940(a) tax or | net investment inc | ome.) | | |
| f section 4940(d)(2) applies, leave th | nis part blank. | | | | | |
| Was the foundation liable for the seci | ion 4042 tay on the dictrib | utable amount of any w | ear in the hace neric | nd2 | | Yes X No |
| if "Yes," the foundation does not qual | | | • | , u | | 103 110 |
| 1 Enter the appropriate amount in o | | | | . | | |
| (a) Base period years | | (b) | | (c) | Dis | (d) tribution ratio |
| Calendar year (or tax year beginnii | ng in) Adjusted qual | ifying distributions | Net value of non | charitable-use asset | s (col. (b) | divided by col. (c)) |
| 2008 | | 8,845. | | 189,12 | | .046768 |
| 2007 | | 5,727. | | 185,06 | | .030946 |
| 2006 | | 13,598. | | 114,67 | | .118579 |
| 2005 | | 5,873. | | 57,71 19,75 | | .101752 |
| 2004 | | 11,658. | <u></u> | 19,75 | 4 • | .590219 |
| 2 Total of line 1, column (d) | | | | | 2 | .888264 |
| Average distribution ratio for the : | S-vear hase nerind - divide : | | or by the number o | f vears | | .000204 |
| the foundation has been in exister | | and total on line 2 by 5, | or by the number o | rycars | 3 | .177653 |
| | | | • | | | |
| Enter the net value of noncharitab | le-use assets for 2009 from | n Part X, line 5 | | | 4 | 178,229. |
| | | • | | •• | | |
| Multiply line 4 by line 3 | | | | | 5 | 31,663. |
| | | | | | | |
| 6 Enter 1% of net investment incom | e (1% of Part I, line 27b) | | | | 6 | 50. |
| | | | | | 1 1 | |
| Add lines 5 and 6 | | | | | . 7 | 31,713. |
| | B 13/11 / | | | | | 4 105 |
| B Enter qualifying distributions from | • | | | • | _ [8] | 4,106. |
| If line 8 is equal to or greater than See the Part VI instructions. | line 7, check the box in Pa | rt VI, line 1b, and comp | lete that part using | a 1% tax rate. | | |

| 1a Exempt operating foundations described in section 4940(d)(2), check here ▶ and enter *N/A* on line 1. Date of ruling or determination letter: (attach copy of letter if necessary-see instructions) b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ 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 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 2 0. | _ | m 990-PF (2009) RULEWICZ FOUNDATION 48-12 art VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - se | 60789 | ıctio | Page 4 |
|---|--|---|---------------|----------|----------|
| Dimestic foundations that eneet the section 4940(e) requirements in Part V, check here | <u>. </u> | | | | 1137 |
| b Domestor foundations that meet the section 4940(s) requirements in Part V, check here ▶ □ and enter 1% of Part I, line 27D c All other domests foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, cot. (b) 2 Tax under section 511 (domestic section 4947(a)(f) trusts and taxable foundations only. Others enter -0-) 3 Add lines 1 and 2 3 Add lines 1 and 2 5 Tax based on investment income. Subtract line 4 from line 3.1 it zor or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3.1 it zor or less, enter -0- 6 Crediss/Payments: 2 2099 settment of progno organizations - Tax withheld at source 6 Tax pand with application for extension of time to file (form 8868) 6 Backup withholding erroneously withheld 7 Total credits and payments. Add lines 5 bit Prough 64 8 Einter any pealty for underpayment of estimated tax. Check here □ 4 form 2220 is attached 9 Tax due, if the lotal of lines 5 and 6 is more than line 7, enter amount owed 9 Tax due, if the lotal of lines 5 and 6 is more than line 7, enter amount owed 10 Overayment. If line 7 is more than the lotal of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be Credited to 2010 estimated tax ▶ Refunded ▶ 11 12 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? 15 During the tax year, did the foundation attempt to milluence any national, state, or local legislation or did it participate or intervene in any political campaign? 16 Def is spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 16 Lines answer in Yes 1 to 1 or 1 b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities 16 Dark Millar A detailed description in connection with the activities 16 Lines answer in Yes 1 to deta | 11 | | | | • |
| of Part I, line 27b All other domestic foundations enter 2% of line 27b. Exempl foreon organizations enter 4% of Part I, line 12, cot. (b) Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) Add lines 1 and 2 Subtible A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) Tax based on investment income. Subtract line 4 from line 3. if zero or less, enter -0- Total screek group organizations - tax withheld at source Tax paid with application for extension of time to file (form 8868) Betwent foreign organizations - tax withheld as source Total recretise and payments. Add lines fo through 6d Eiter any penalty for underpsyment of estimated tax. Check here If Form 2220 is attached Total recretise and payments. Add lines fo through 6d Foreign and payments. Add lines foreign and through 6d Foreign and payments. Add lines foreign and through 6d Foreign and payments. Add lines foreign and foreign and foreign and foreign and foreign and foreign and payments. Add lines foreign and fore | | | • | 1 | חח |
| c All other domestic foundations enter 2% of the 27b. Exempl foreon organizations enter 4% of Part I, line 12, cot. (b) 2 2 Tax under section 511 (domestic section 947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 Add lines 1 and 2 4 Subteh A (income) but (domestic section 947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract time 4 from line 3. If zer or itsis, enter -0-) 5 Tax based on investment income. Subtract time 4 from line 3. If zer or itsis, enter -0-) 5 Tax based on investment income. Subtract time 4 from line 3. If zer or itsis, enter -0-) 5 Tax based on investment income. Subtract time 4 from line 3. If zer or itsis, enter -0-) 5 Tax based on investment income. Subtract time 4 from line 3. If zer or itsis, enter -0-) 6 Credis/Fayments: 2 2009 estimated tax payments and 2008 overpayment credited to 2009 8 be tempt foreign organizations - tax withheld at source 7 Total credits and payments. Add lines 6 through 60 8 Backup withholding groneously withheld 6 Gall 7 7 Total credits and payments. Add lines 6 through 60 8 Enter any penalty for underpayment of estimated tax. Check here | | 1 (.) | | | |
| 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 100. 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 incomes. Subtract line 4 from tine 3.1f zero or lists, enter -0- 5 Credists/primetis: a 2009 estimated tax payments and 2008 overpayment credited to 2009 5 Exempt foreign organizations. Exit withheld at source 6 Tax pand with application for extension of time to file (Form 8868) 6 6 6 7 Total credits and payments. Add lines 58 through 68 7 Total credits and payments. Add lines 58 through 69 8 Extension of the total of lines 5 and 8 is more than line 7, enter amount over 40 9 Tax disc. If the total of lines 5 and 8 is more than line 7, enter amount over 40 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 16. Credited to 2010 estimated tax. 12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any other amount of line 10 to 16. Credited to 2010 estimated tax. 15 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any other amount of lines 10 to 16. Credited to 2010 estimated tax. 16 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any other activities. 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 other activities. 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 other activities. 1a During the tax year, did the foundation attempt to with exercities of incorporation or did it participate or intervene in any other tax o | | | | | |
| 3 100. Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) Tax based on investment income. Subtract line 4 from line 3. if zero or less, enter -0- Credits/Payments: 2009 estimated tax payments and 2008 overpayment credited to 2009 b Exempt foreign organizations - tax withheld at source C Tax pad with application for cardenson of time to file (Form 8868) b Eack payments and 2008 overpayment credited to 2009 b Exempt foreign organizations - tax withheld at source C Tax pad with application for cardenson of time to file (Form 8868) b Eack payments and 2008 overpayment of estimated tax. Check here ☐ #Form 2220 is attached Total credits and payments. Add lines 5 and 8 is more than line 7, enter amount ower Tax dec. If the total of lines 5 and 8 is more than the 10x in lines 5 and 8, enter the amount overpaid 11. Enter the amount of line 10 to be: Credited to 2010 estimated tax. Part VII-A Statements Regarding Activities Ta During the tax year, did the foundation attempt to influence any national, state, or local legislation or did if participate or interview in any political campaign? But 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 econnection with the activities. C Did the foundation. File 7 mil 120-POL for this year? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities. C Did the foundation. File 7 mil 120-POL for this year? If wes, "ratach a detailed description of the activities." C But the foundation is Form 1120-POL for this year? If Yes, "ratach a detailed description of the activities. C Did the foundation is Form 1120-POL for this year? If Yes, "ratach a detailed description of the activities." A Did the foundation have are all years and the form 120-POL f | _ | | | | Λ |
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| bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? b If "Yes," has it filed a tax return on Form 990-T for this year? Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T. 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? 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. Ba Enter the states to which the foundation reports or with which it is registered (see instructions) OK 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 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 9 X | | | -1 | | |
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| b If "Yes," has it filed a tax return on Form 990-T for this year? Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T. 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? 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. Ba Enter the states to which the foundation reports or with which it is registered (see instructions) OK 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 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 At the state in liquidation in the state in the state law remains and the state in the state in the state law remains and the state l | | | . 3 | | |
| Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T. 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? 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. Enter the states to which the foundation reports or with which it is registered (see instructions) OK 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 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 State Attach explanation that deflectively amends the governing instrument or substitutions for Part XIV)? If "Yes," complete Part XIV State Attach explanation that conflict with the state law are all the state and the s | 4a | Did the foundation have unrelated business gross income of \$1,000 or more during the year? | . 4a | | X |
| 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: • 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? 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. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) ► OK 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 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 | b | If "Yes," has it filed a tax return on Form 990-T for this year? N/A | . 4b | | |
| 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? 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. Ba Enter the states to which the foundation reports or with which it is registered (see instructions) OK 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 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 A X X | 5 | Was there a liquidation, termination, dissolution, or substantial contraction during the year? | . 5 | | X |
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| remain in the governing instrument? 7 Did the foundation have at least \$5,000 in assets at any time during the year? 7 If "Yes," complete Part II, col. (c), and Part XV. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) OK 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 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 9 X | | By language in the governing instrument, or | | | |
| 7 X If "Yes," complete Part II, col. (c), and Part XV. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) OK 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 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(i)(3) or 4942(i)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV 9 X | | By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law | ' | | |
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| OK 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 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 9 X | 8a | | _ _ | | 1 1 |
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| of each state as required by General Instruction G? If "No," attach explanation 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 9 X | b | -, | _ | | |
| 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 9 X | _ | | 8b | Х | |
| year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV | 9 | · | | , | |
| | - | | 9 | | x |
| | 10 | | | | |

10 X Form **990-PF** (2009)

| Form 990-PF (2009) RULEWICZ FOUNDATION | 48-126 | 0789 | Page 5 |
|--|--|-------|---------------|
| 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 | ing 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 | Х |
| 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption appl | lication? | 13 | X |
| Website address ► N/A | • • | | |
| 14 The books are in care of ▶ STEPHEN J. RULEWICZ | Telephone no. ▶405-3 | 41-32 | 285 |
| Located at ► 1200 WOODY CREEK COURT, EDMOND, OK | ZIP+4 ▶7 | | |
| 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here | ······································ | | ightharpoonup |
| 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 R | 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): | | | |
| (1) Engage in the sale or exchange, or leasing of property with a disqualified person? | Yes X No | 1. | - |
| (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) | | . | |
| a disqualified person? | Yes X No | | |
| (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? | Yes X No | | |
| (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? | Yes X No | | |
| (5) Transfer any income or assets to a disqualified person (or make any of either available | | } | |
| for the benefit or use of a disqualified person)? | Yes X No | 1 | |
| (6) Agree to pay money or property to a government official? (Exception. Check "No" | | | |
| if the foundation agreed to make a grant to or to employ the official for a period after | | | |
| termination of government service, if terminating within 90 days.) | Yes X No | | |
| b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regula | • | | |
| section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? | N/A | 1.1 | |
| • | N/A ▶□ | 1b | |
| Organizations relying on a current notice regarding disaster assistance check here | | | |
| c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that we | re not corrected | 1, 1 | 37 |
| before the first day of the tax year beginning in 2009? | | 1c | <u> </u> |
| 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private op | perating 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 | | | |
| before 2009? | Yes X No | | |
| If "Yes," list the years \blacktriangleright | | | |
| b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (| | 1 | |
| valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, ans | | | |
| statement - see instructions.) | Ņ/A | 2b | |
| c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. | | | - ' |
| | | | |
| 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time | | 1 [| |
| during the year? | Yes X No | 1 | |
| b If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disc | qualified persons after | | |
| May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section | ion 4943(c)(7)) to dispose | | |
| of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? | Use Schedule C, | | |
| Form 4720, to determine if the foundation had excess business holdings in 2009) | N/A | 3b | |
| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose | | 4a | Х |
| b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize it | • • • • | | |
| had not been removed from jeonardy before the first day of the tay year beginning in 20002 | parpoorum | ,, | v |

| Form 990-PF (2009) RULEWICZ FOUNDATION | | | 48-1260 | <u> 789 </u> | Page 6 |
|--|---|--|--|---|-------------------------------|
| Part VII-B Statements Regarding Activities for Which | Form 4720 May Be | Required (contin | nued) | | |
| 5a During the year did the foundation pay or incur any amount to: | | | | | |
| (1) Carry on propaganda, or otherwise attempt to influence legislation (section | \ <i>\</i> // | | es X No | Ì |] |
| (2) Influence the outcome of any specific public election (see section 4955); | or to carry on, directly or indi | | | | |
| any voter registration drive? | | · · — | es 🗓 No | 1 | - |
| (3) Provide a grant to an individual for travel, study, or other similar purposes | 5? | . L Y | es 🗶 No | İ | |
| (4) Provide a grant to an organization other than a charitable, etc., organization | on described in section | | | | |
| 509(a)(1), (2), or (3), or section 4940(d)(2)? | | | es 🗶 No | | ŀ |
| (5) Provide for any purpose other than religious, charitable, scientific, literary | , or educational purposes, or | | | ŀ | , |
| the prevention of cruelty to children or animals? | | . L Y | es 🗓 No | ļ | |
| b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify un | der the exceptions described | ın Regulations | ľ | | |
| section 53.4945 or in a current notice regarding disaster assistance (see instru | uctions)? | | N/A | 5b | |
| Organizations relying on a current notice regarding disaster assistance check t | here | | | | |
| c If the answer is "Yes" to question 5a(4), does the foundation claim exemption f | from the tax because it mainta | uned | | | |
| expenditure responsibility for the grant? | ŀ | 1/A 🔲 Y | es 🔲 No | | |
| If "Yes," attach the statement required by Regulations section 53 494 | 5-5(d). | | i | | |
| 6a Did the foundation, during the year, receive any funds, directly or indirectly, to | pay premiums on | | | | |
| a personal benefit contract? | | 🗀 Ye | es 🔀 No | 1 | - |
| b Did the foundation, during the year, pay premiums, directly or indirectly, on a p | personal benefit contract? | | | 6b | X |
| If "Yes" to 6b, file Form 8870 | | | | | |
| 7a At any time during the tax year, was the foundation a party to a prohibited tax s | shelter transaction? | . 🗀 Ye | es 🗶 No | 1 1 | |
| b If yes, did the foundation receive any proceeds or have any net income attribut | | <u> </u> | N/A | 7b | |
| Part VIII Information About Officers, Directors, Trust Paid Employees, and Contractors | ees, Foundation Ma | anagers, Highly | У | | |
| 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 deterred compensation | (e) Exaccount allow | xpense nt, other vances |
| STEPHEN J. RULEWICZ | TRUSTEE | | | | |
| 1200 WOODY CREEK COURT | | | | | |
| EDMOND, OK 73034-7075 | 1.00 | 0. | 0. | .] | 0. |
| DIANE B. RULEWICZ | TRUSTEE | | | | |
| 1200 WOODY CREEK COURT | _ | | • | | |
| EDMOND, OK 73034-7075 | 1.00 | 0. | 0. | | 0. |
| | | | | 1 | |
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| | | | | <u> </u> | |
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| | | | | | |
| 2. Comparation of the highest and amplementation of the standard | | THE STATE OF THE S | | <u> </u> | |
| 2 Compensation of five highest-paid employees (other than those inc | (b) Title, and average | enter NONE." | (d) Contributions to | (a) E | YNence |
| (a) Name and address of each employee paid more than \$50,000 | hours per week devoted to position | (c) Compensation | employee benefit plans and deferred compensation | accour | kpense nt, other vances |
| NONE | | | | | |
| | | | | ļ <u>.</u> | |
| | | | | | |
| | | | | | |
| | |] | | | |
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| | | | | | |
| | | | | | |
| | | | | | |
| Total number of other employees paid over \$50,000 | | 1 | | ····· | 0 |

Form **990-PF** (2009)

| FORM 990-PF (2009) RULEWICZ FOUNDATION | 48-1 | <u> 260789</u> Page 7 |
|---|---|-----------------------|
| Part VIII Information About Officers, Directors, Trustees, Four Paid Employees, and Contractors (continued) | ndation Managers, Highly | |
| 3 Five highest-paid independent contractors for professional services. If none, e | 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 sinumber of organizations and other beneficiaries served, conferences convened, research papers | tatistical information such as the produced, etc. | Expenses |
| 1 N/A | | |
| | | |
| | | |
| 2 | | |
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| 3 | | |
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| | | — ma. |
| 4 | | |
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| D LIV D | | |
| Part IX-B Summary of Program-Related Investments | | |
| Describe the two largest program-related investments made by the foundation during the tax year | on lines 1 and 2. | Amount |
| 1 N/A | | |
| | | |
| ^ | | |
| 2 | | |
| | | |
| All other program-related investments. See instructions. | | |
| 3 | 1 | |
| | | |
| | · · · · · · · · · · · · · · · · · · · | |
| Total Add lines 1 through 3 | . | 0 - |

| P | art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four | ndations, | see instructions) |
|----|---|--------------|---------------------|
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: | | |
| а | | 1a | 156,423. |
| b | Average of monthly cash balances | 1b | 156,423. 24,520. |
| C | Fair market value of all other assets | 1c | |
| d | Total (add lines 1a, b, and c) | 1d | 180,943. |
| е | Reduction claimed for blockage or other factors reported on lines 1a and | | |
| | 1c (attach detailed explanation) 1e 0. | İ | |
| 2 | Acquisition indebtedness applicable to line 1 assets | 2 | 0. |
| 3 | Subtract line 2 from line 1d | 3 | 180,943. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 2,714. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 178,229. |
| 6 | Minimum investment return. Enter 5% of line 5 | 6 | 8,911. |
| P | Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here and do not complete this part.) | d certain | |
| 1 | Minimum investment return from Part X, line 6 | 1 | 8,911. |
| 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.) | l | |
| C | Add lines 2a and 2b | 2c | 100. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 8,811. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 8,811. |
| 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 | 8,811. |
| P | art XII Qualifying Distributions (see instructions) | | |
| 1 | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: | - | |
| а | Expenses, contributions, gifts, etc total from Part I, column (d), line 26 | 1a | 4,106. |
| 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 | 4,106. |
| 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 | 0. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 4,106. |
| | Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation q | ualifies for | the section |

Part XIII Undistributed Income (see instructions)

| İ | (a) Corpus | (b) Years prior to 2008 | (c) 2008 | (d) 2009 |
|--|---------------------------------------|---------------------------------------|---|----------------|
| 1 Distributable amount for 2009 from Part XI, line 7 | , | | | 8,811. |
| 2 Undistributed income, if any, as of the end of 2009 | , , | · · · · · · · · · · · · · · · · · · · | | |
| a Enter amount for 2008 only | | | 0. | |
| ь Total for prior years: | | 0. | | |
| 3 Excess distributions carryover, if any, to 2009: | | | | |
| a From 2004 10,670. | | | | |
| b From 2005 2,999. | | · . | · . | ,* |
| c From 2006 7,988. | · | | | |
| d From 2007 | | | | • |
| e From 2008 | | | • | ' 1' |
| f Total of lines 3a through e | 21,657. | | , | |
| 4 Qualifying distributions for 2009 from | | | | |
| Part XII, line 4: \triangleright \$ 4, 106. | , | | .; | , |
| a Applied to 2008, but not more than line 2a | , | | 0. | • |
| b Applied to undistributed income of prior | 1 | | | · · · · |
| years (Election required - see instructions) | <u>-</u> | 0. | | |
| c Treated as distributions out of corpus | | | | |
| (Election required - see instructions) | 0. | | | |
| d Applied to 2009 distributable amount | . , | , . | , , , , , , , | 4,106. |
| e Remaining amount distributed out of corpus | 0. | | | Į. |
| 5 Excess distributions carryover applied to 2009 | 4,705. | <u>'</u> | | 4,705. |
| (If an amount appears in column (d), the same amount must be shown in column (a)) | | • - 1 | . | • |
| 6 Enter the net total of each column as indicated below: | | | _ | - , |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | 16,952. | | | |
| 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 | , | | , , | 0. |
| 7 Amounts treated as distributions out of | | | 7 | |
| 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 | 5,965. | • | | |
| 9 Excess distributions carryover to 2010. | | | - | |
| Subtract lines 7 and 8 from line 6a | 10,987. | | | |
| 10 Analysis of line 9: | | | | |
| a Excess from 2005 2,999. | | | | , |
| b Excess from 2006 7,988. | | | | • |
| c Excess from 2007 | | | | |
| d Excess from 2008 | , | | | |
| e Excess from 2009 | | · | ' ' | |
| | | | | - 000 DE |

| Part XIV Private Operating F | Z FOUNDATIO | | A guestion (I) | | L260/89 Page II |
|--|-----------------------------|-------------------------------|-----------------------------|---------------------------|-----------------------|
| | | | -A, question 9) | N/A | |
| 1 a If the foundation has received a ruling of | | • | | | |
| foundation, and the ruling is effective for | | | ti | 14040(3(2) == | 40.40(.)(5) |
| b Check box to indicate whether the found | | ig foundation described t | | 4942(j)(3) or | 4942(j)(5) |
| 2 a Enter the lesser of the adjusted net | Tax year (a) 2009 | (b) 2008 | Prior 3 years (c) 2007 | (d) 2006 | (e) Total |
| income from Part I or the minimum | (a) 2009 | (1) 2000 | (6) 2007 | (4) 2000 | (e) rotar |
| investment return from Part X for | | | | | |
| each year listed | | | | | |
| b 85% of line 2a | | | | | |
| c Qualifying distributions from Part XII, | | | | | |
| line 4 for each year listed | | | | | <u></u> |
| d Amounts included in line 2c not | | | | | |
| used directly for active conduct of | | | | | |
| exempt activities | | | | 1 | |
| e Qualifying distributions made directly | | | | | |
| for active conduct of exempt activities. | | | | | |
| Subtract line 2d from line 2c | | | | ļ <u>.</u> | |
| 3 Complete 3a, b, or c for the alternative test relied upon: | | | | | |
| a "Assets" alternative test - enter: | | | | | |
| (1) Value of all assets | | | | ļ | |
| (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 | İ | | | | |
| (4) Gross investment income | | | | | |
| Part XV Supplementary Info | mation (Complet | te this part only i | f the foundation | had \$5,000 or i | more in assets |
| at any time during the | ne year-see the i | nstructions.) | | | |
| 1 Information Regarding Foundation | n Managers: | | | | |
| a List any managers of the foundation who | have contributed more t | han 2% of the total contr | ibutions received by the | foundation before the | close of any tax |
| year (but only if they have contributed m | ore than \$5,000). (See se | ection 507(d)(2).) | | | |
| SEE STATEMENT 7 | | | | | |
| b List any managers of the foundation who other entity) of which the foundation has | | | or an equally large portion | on of the ownership of a | a partnership or |
| NONE | | | | | |
| 2 Information Regarding Contribution | | | | | |
| Check here 🕨 🗓 if the foundation or | nly makes contributions to | o preselected charitable c | organizations and does r | not accept unsolicited re | equests for funds. If |
| the foundation makes gifts, grants, etc. (| see instructions) to indivi | duals or organizations ur | nder other conditions, co | omplete items 2a, b, c, a | and d. |
| a The name, address, and telephone numb | er of the person to whom | applications should be a | addressed: | | |
| | | | | | |
| | | | | | |
| b The form in which applications should be | submitted and informati | on and materials they sh | ould include: | | |
| c Any submission deadlines: | | | | | |
| d Any restrictions or limitations on awards | , such as by geographica | l areas, charntable fields, l | kınds of institutions, or o | other factors: | |
| | | | | | |

| Part XV Supplementary Information | | | · · · · · · · · · · · · · · · · · · · | |
|--|--|----------------------|---------------------------------------|---------------------------------------|
| 3 Grants and Contributions Paid During the Y | ear or Approved for Future | Payment | | · · · · · · · · · · · · · · · · · · · |
| Recipient Name and address (home or business) | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of | Purpose of grant or contribution | Amount |
| | or substantial contributor | recipient | | |
| a Paid during the year FIRST UNITED METHODIST CHURCH | N/A | CHURCH | FINANCIAL SUPPORT | 3,500 |
| JUNIOR LEAGUE OF OKLAHOMA | N/A | PUBLIC CHARITY | FINANCIAL SUPPORT | 100 |
| RAINBOW FLEET | N/A | PUBLIC CHARITY | FINANCIAL SUPPORT | 100 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total . | | | ▶ 3a | 3,700. |
| b Approved for future payment | | | , Ja | 3,700 |
| NONE | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| Total . | | | ▶ 3b | 0. |

Part XVI-A **Analysis of Income-Producing Activities**

| Enter gross amounts unless otherwise indicated. | Unrelated b | usiness income | | y section 512, 513, or 514 | (e) |
|--|---------------------------------------|--|--|----------------------------|--|
| | (a) Business | (b) Amount | (C) Exclu- sion | (d) Amount | Related or exempt function income |
| 1 Program service revenue: | code | | code | | |
| a | | | - - | | ······································ |
| b | J | | | | |
| c | | | | | · · · · · · · · · · · · · · · · · · · |
| d | | - · · · · · · · · · · · · · · · · · · · | + | | |
| e | <u> </u> | | | | |
| f | | | 1 | | |
| g Fees and contracts from government agencies | | - | | | |
| 2 Membership dues and assessments | <u> </u> | | <u> </u> | · | |
| 3 Interest on savings and temporary cash | } [| | | | |
| investments | | | | | |
| 4 Dividends and interest from securities | | | 14 | 5,638. | |
| 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 | İ | | | | |
| O Net were as the extreme as a second as week. | | | 1 1 | | |
| 40.0 | | | | | |
| 10 Gross profit or (loss) from sales of inventory | <u> </u> | | | | |
| | | | | | |
| a | | | | | |
| b | | | | | |
| c . | ļ | | | | |
| d | | | | | |
| e | | | | F 620 | |
| 12 Subtotal. Add columns (b), (d), and (e) | - | 0. | | 5,638. | 0. |
| 13 Total. Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) | | | | . 13 | 5,638. |
| Part XVI-B Relationship of Activities to | ne is reported in co | olumn (e) of Part XVI-A | · | | lishment of |
| the foundation's exempt purposes (other than b | y providing funds | for such purposes). | | | |
| | <u> </u> | | | | |
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| 923621 | | | | | Form 990-PF (2009) |
| | | | | | FORM 35917-PF (2009) |

| | CZ FOUNDATION | | 48-1260 | | | ige 13 |
|--|---------------------------------------|---------------------------------------|--|----------------|--------|----------|
| Part'XVII Information Reg Exempt Organiz | | and Transactions a | and Relationships With Nonchar | ritable |) | |
| Did the organization directly or indirectly. | ctly engage in any of the following | ng with any other organization | on described in section 501(c) of | | Yes | No |
| the Code (other than section 501(c)(3 | 3) organizations) or in section 5: | 27, relating to political organ | nizations? | | | - |
| a Transfers from the reporting foundati | ion to a noncharitable exempt or | rganization of: | | | | ļ |
| (1) Cash | | | | 1a(1) | | Х |
| (2) Other assets | | | | 1a(2) | | X |
| b Other transactions: | | | | | , ``, | . ا |
| (1) Sales of assets to a noncharitable | e exempt organization | | | 1b(1) | | X |
| (2) Purchases of assets from a nonc | charitable 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 mem | bership or fundraising solicitation | ons | | 1b(6) | | _X |
| c Sharing of facilities, equipment, mailir | ng lists, other assets, or paid em | nployees | | 1c | | X |
| d If the answer to any of the above is "Y | 'es," complete the following sche | edule. Column (b) should alv | ways show the fair market value of the goods, o | ther ass | ets, | |
| or services given by the reporting four | ndation. If the foundation receiv | ed less than fair market valu | ie in any transaction or sharing arrangement, sh | าดพ เก | | |
| column (d) the value of the goods, oth | her assets, or services received. | | | | | |
| (a) Line no (b) Amount involved | (c) Name of noncharitable | e exempt organization | (d) Description of transfers, transactions, and s | haring arr | angeme | nts |
| | N/A | | | | | |
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| | | | <u> </u> | | | |
| 2a Is the foundation directly or indirectly | affiliated with, or related to, one | or more tax-exempt organiz | zations described | | | |
| in section 501(c) of the Code (other th | nan section 501(c)(3)) or in sect | tion 527? | | Yes | X | No |
| b If "Yes," complete the following schedu | | | | | | |
| (a) Name of organ | ization | (b) Type of organization | (c) Description of relationsh | ıp | | |
| N/A | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| Under penalties of perjury, I declare that have and complete Declaration of prepares other the | examined this return, including acco | mpanying schedules and statement | ents, and to the best of my knowledge and belief, it is tr | ие, соттес | it, | |
| | Tan taxpayer of Houcial yyis based in | 7 16/1 | 1 Niowiecigo | | | |
| | | | | | | |
| Signature of officer of thustee | | Dayle / | Title | | | |
| Signature Preparer's signature | / 1/0 . | Da | 201 | 's identifyi | - | _ |
| Signature CC | that Tomber | | 5//3/10 employed ► P | 0002 | 1891 | <u> </u> |
| FINLE | | | EIN ► | | | |
| rf self-employed), PO BO | X 1447 | | | | | |
| address, and ZIP code SHAWN | EE, OK 74802 | -1447 | Phone no. 405-2 | | | |
| | | | For | m 990 - | PF (2 | 2009) |

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 of the organization | | Employer Identification number | |
|---|--|--|--|
| R | ULEWICZ FOUNDATION | 48-1260789 | |
| Organization type (check | one): | | |
| Filers of: | Section: | | |
| Form 990 or 990-EZ | 501(c)() (enter number) organization | | |
| | 4947(a)(1) nonexempt charitable trust not treated as a private foundation | | |
| | 527 political organization | | |
| Form 990-PF | X 501(c)(3) exempt private foundation | | |
| | 4947(a)(1) nonexempt charitable trust treated as a private foundation | | |
| | 501(c)(3) taxable private foundation | | |
| | | | |
| | s covered by the General Rule or a Special Rule. 1(7), (8), or (10) organization can check boxes for both the General Rule and a Special Ru | ile. See instructions. | |
| General Rule | | | |
| X For an organization contributor. Comp | n filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in millete Parts I and II | oney or property) from any one | |
| Special Rules | | | |
| 509(a)(1) and 170(| c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the reg b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the ii) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1 Complete Parts I and II. | | |
| aggregate contrib | c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contri utions of more than \$1,000 for use exclusively for religious, chantable, scientific, literary, cruelty to children or animals Complete Parts I, II, and III | <u> </u> | |
| contributions for u If this box is check purpose Do not c | c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributes exclusively for religious, charitable, etc., purposes, but these contributions did not agoed, enter here the total contributions that were received during the year for an exclusive complete any of the parts unless the General Rule applies to this organization because it e, etc., contributions of \$5,000 or more during the year. | gregate to more than \$1,000 by religious, charitable, etc., | |

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

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

| Schedule B (F | form 990, 990-EZ, or 990-PF) (2009) | | Page 1 of 1 of Part I | | |
|----------------------|---|--------------------------------|--|--|--|
| Name of organization | | | Employer identification number | | |
| RULEW | ICZ FOUNDATION | <u> </u> | 48-1260789 | | |
| Part I | Contributors (see instructions) | | | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Aggregate contributions | (d) Type of contribution | | |
| 1 | RULEWICZ FAMILY, LLC 1200 WOODY CREEK COURT | \$26,973 | Person Payroll Noncash (Complete Part II if there | | |
| | EDMOND, OK 73034-7075 | | is a noncash contribution) | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Aggregate contributions | (d) Type of contribution | | |
| 2 | RULEWICZ ENERGY, LLC 1200 WOODY CREEK COURT EDMOND, OK 73034-7075 | \$25,461 | Person Payroll Noncash (Complete Part II if there is a noncash contribution) | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Aggregate contributions | (d) Type of contribution | | |
| | | * | Person Payroll Noncash (Complete Part II if there is a noncash contribution) | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Aggregate contributions | (d) Type of contribution | | |
| | | \$ | Person Payroll Noncash (Complete Part II if there is a noncash contribution.) | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Aggregate contributions | (d) Type of contribution | | |
| | | \$ | Person Payroll Noncash (Complete Part II if there is a noncash contribution.) | | |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Aggregate contributions | (d) Type of contribution | | |
| | | \$ | Person Payroll Noncash (Complete Part II of there is a noncash contribution.) | | |

923452 02-01-10

Page 1 of 1 of Part II
Employer identification number

RULEWICZ FOUNDATION

48-1260789

| Part II | Noncash Property (see instructions) | 1 40 | -1200789 |
|------------------------------|--|--|----------------------|
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| 1 | 2,700 SHARES OF FORD STOCK | | 12/30/09 |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| 2 | 900 SHARES OF DOW CHEMICAL STOCK | | 12/30/09 |
| (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 |
| | | | |
| (a) No. From Part I | (b) Description of noncash property given | (c) FMV (or estimate) (see instructions) | (d) Date received |
| | | \$ | |

| FORM 990-PF DIVIDENT | OS AND | INTER | EST FROM | SECU | RITIES | STATEMENT | 1 |
|----------------------------------|---------------------|---------------------|-----------------|------|------------------------------|------------------------------|---------|
| SOURCE | | GROSS | AMOUNT | | ITAL GAINS IVIDENDS | COLUMN (A) AMOUNT | |
| MERRILL LYNCH | _ | | 5,638. | | 0. | 5,63 | 8. |
| TOTAL TO FM 990-PF, PART I, I | LN 4 = | | 5,638. | | 0. | 5,63 | 8. |
| FORM 990-PF | AC | COUNTI | NG FEES | | | STATEMENT | 2 |
| DESCRIPTION | EXPE | A) NSES BOOKS | | EST- | (C) ADJUSTED NET INCOM | (D) CHARITAB E PURPOSE | |
| ACCOUNTING | | 813. | | 407. | | 40 | 6. |
| TO FORM 990-PF, PG 1, LN 16B | · | 813. | | 407. | | 40 | 6. |
| FORM 990-PF | | TAX | ES | | | STATEMENT | 3 |
| DESCRIPTION | EXPE | A) NSES BOOKS | | EST- | (C) ADJUSTED NET INCOM | (D) CHARITAB E PURPOSE | |
| EXCISE TAXES | | 259. | 0. | | 0. | | |
| TO FORM 990-PF, PG 1, LN 18 | | 259. | | 0. | | | 0. |
| FORM 990-PF | O | THER E | XPENSES | | | STATEMENT | 4 |
| | (<i>I</i> EXPEN | A) | (B) NET INVE | EST- | (C) ADJUSTED | (D) CHARITAB | LE |
| DESCRIPTION | | BOOKS | | | NET INCOM | E PURPOSE: | S |
| DESCRIPTION INVESTMENT EXPENSES | | | | | | | S 0. |

| FORM 990-PF | CORPORATE STOCK | | STATEMENT | |
|-------------------------|---|------------|-------------|----------|
| DESCRIPTION | | BOOK VALUE | FAIR MARKE | Г |
| MERRILL LYNCH - CORP S' | TOCK | 156,548. | 108,10 | 05. |
| TOTAL TO FORM 990-PF, | PART II, LINE 10B | 156,548. | 108,10 |)5. — |
| FORM 990-PF | CORPORATE BONDS | | STATEMENT | 6 |
| DESCRIPTION | | BOOK VALUE | FAIR MARKET | Г |
| MERRILL LYNCH - CORP BO | ONDS | 133,969. | 82,60 | 35. |
| TOTAL TO FORM 990-PF, 1 | PART II, LINE 10C | 133,969. | 82,60 |)5. |
| FORM 990-PF | PART XV - LINE 1A LIST OF FOUNDATION MANAG | . FDC | STATEMENT | 7 |

NAME OF MANAGER

STEPHEN J. RULEWICZ DIANE B. RULEWICZ