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## Return of Private Foundation

2009

Department of the Treasury  
Internal Revenue Serviceor Section 4947(a)(1) Nonexempt Charitable Trust  
Treated as a Private Foundation

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

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 changeUse the IRS  
label.  
Otherwise,  
print  
or type.  
See Specific  
Instructions

Name of foundation

ALINE UNDERHILL ORTEN FOUNDATION, INC.

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

ONE GALLERIA BOULEVARD

Room/suite

1100

City or town, state, and ZIP code

METAIRIE, LA 70001

A Employer identification number

72-1477797

B Telephone number

586-838-2128

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

J Accounting method

☒ Cash☐ Accrual

(from Part II, col. (c), line 16)

☐ Other (specify)

\$ 2,677,949. (Part I, column (d) must be on cash basis.)

C 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 ☐

## Part I

## Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

(a) Revenue and  
expenses per books(b) Net investment  
income(c) Adjusted net  
income(d) Disbursements  
for charitable purposes  
(cash basis only)

Revenue

1 Contributions, gifts, grants, etc., received

2 Check ☒ if the foundation is not required to attach Sch B

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

b Gross sales price for all assets on line 6a

7 Capital gain net income (from Part IV, line 2)

8 Net short-term capital gain

9 Income modifications

10a Gross sales less returns and allowances

b Less Cost of goods sold

c Gross profit or (loss)

11 Other income

12 Total. Add lines 1 through 11

13 Compensation of officers, directors, trustees, etc.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees STMT 4

b Accounting fees STMT 5

c Other professional fees STMT 6

17 Interest

18 Taxes STMT 7

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses STMT 8

24 Total operating and administrative

expenses. Add lines 13 through 23

25 Contributions, gifts, grants paid

26 Total expenses and disbursements

Add lines 24 and 25

27 Subtract line 26 from line 12

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

c Adjusted net income (if negative, enter -0-)

N/A

94,330.

94,330.

STATEMENT 1

73,975.

73,975.

STATEMENT 2

-193,290.

-193,290.

0.

2,949.

2,949.

STATEMENT 3

-22,036.

171,254.

103,820.

51,910.

51,910.

10,465.

0.

0.

10,400.

0.

0.

1,100.

0.

0.

8,013.

238.

0.

24,754.

246.

0.

158,552.

52,394.

51,910.

80,000.

80,000.

238,552.

52,394.

131,910.

-260,588.

118,860.

N/A

SCANNED NOV 05 2010

RECEIVED

NOV 08 2010

GODEN, UT

23

Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	26,060.	29,415.	29,415.
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 10	2,812,454.	2,545,390.	2,648,534.
	14 Land, buildings, and equipment basis ▶ 15,757.			
	Less accumulated depreciation STMT 11 ▶ 15,757.			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	2,838,514.	2,574,805.	2,677,949.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	24 Unrestricted and complete lines 24 through 26 and lines 30 and 31.			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	2,838,514.	2,574,805.	
	30 Total net assets or fund balances	2,838,514.	2,574,805.	
	31 Total liabilities and net assets/fund balances	2,838,514.	2,574,805.	

## 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	2,838,514.
2 Enter amount from Part I, line 27a	2	-260,588.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	2,577,926.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 9	5	3,121.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,574,805.

**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			
b SEE ATTACHED STATEMENTS			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 324,797.		517,866.	-193,290.

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			
b			
c			
d			
e			-193,290.

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	-193,290.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8 }	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	169,869.	2,738,074.	.062040
2007	185,976.	3,545,226.	.052458
2006	154,471.	3,447,670.	.044804
2005	146,200.	3,257,444.	.044882
2004	140,582.	3,141,408.	.044751

2 Total of line 1, column (d)	2	.248935
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	.049787
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	2,236,827.
5 Multiply line 4 by line 3	5	111,365.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,189.
7 Add lines 5 and 6	7	112,554.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions	8	131,910.

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)	1	1,189.
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)	2	0.
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	3	1,189.
3	Add lines 1 and 2	4	0.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	5	1,189.
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-		
6	<b>Credits/Payments</b>		
a	2009 estimated tax payments and 2008 overpayment credited to 2009	6a	1,240.
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	750.
d	Backup withholding erroneously withheld	6d	
7	<b>Total credits and payments.</b> Add lines 6a through 6d	7	1,990.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	2.
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	799.
11	Enter the amount of line 10 to be <b>Credited to 2010 estimated tax</b> <input checked="" type="checkbox"/> 799. <input type="checkbox"/> Refunded <input checked="" type="checkbox"/> 0.	11	0.

**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
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> LA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation		X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

SEE STATEMENT 12

**Part VII-A Statements Regarding Activities** (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► JOYCE A. ROEHL Located at ► 35745 BEATTIE DRIVE, STERLING HEIGHTS, MI	Telephone no	► 586-838-2128	
		ZIP+4	► 48312	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	► 15	N/A	

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here		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?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? If "Yes," list the years ►	<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 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 ►		
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))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870.

☐ Yes ☒ No

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

N/A

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 13		103,820.	0.	0.

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

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

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



0

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

(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

0

**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
<b>1</b> CHARITABLE DONATIONS TO 26 CHARITABLE ORGANIZATIONS	
	0.
<b>2</b>	
<b>3</b>	
<b>4</b>	

**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
<b>1</b> N/A	
<b>2</b>	
All other program-related investments See instructions	
<b>3</b>	
<b>Total.</b> Add lines 1 through 3	0.

Form 990-PF (2009)



**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	2,237,556.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	33,334.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	
<b>d</b>	Total (add lines 1a, b, and c)	<b>1d</b>	2,270,890.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	2,270,890.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	34,063.
<b>5</b>	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	2,236,827.
<b>6</b>	Minimum investment return. Enter 5% of line 5	<b>6</b>	111,841.

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	111,841.
<b>2a</b>	Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	1,189.
<b>b</b>	Income tax for 2009 (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	1,189.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	110,652.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	110,652.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	110,652.

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	131,910.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	131,910.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	1,189.
<b>6</b>	Adjusted qualifying distributions. Subtract line 5 from line 4	<b>6</b>	130,721.

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

**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
<b>1</b> Distributable amount for 2009 from Part XI, line 7				110,652.
<b>2</b> Undistributed income, if any, as of the end of 2009				
<b>a</b> Enter amount for 2008 only			79,244.	
<b>b</b> Total for prior years		0.		
<b>3</b> Excess distributions carryover, if any, to 2009				
<b>a</b> From 2004				
<b>b</b> From 2005				
<b>c</b> From 2006				
<b>d</b> From 2007				
<b>e</b> From 2008				
<b>f</b> Total of lines 3a through e	0.			
<b>4</b> Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 131,910.				
<b>a</b> Applied to 2008, but not more than line 2a			79,244.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2009 distributable amount	0.			52,666.
<b>e</b> Remaining amount distributed out of corpus	0.			
<b>5</b> Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e. Subtract line 5	0.			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b		0.		
<b>c</b> 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.		
<b>d</b> Subtract line 6c from line 6b Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instr			0.	
<b>f</b> Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				57,986.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
<b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7	0.			
<b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	0.			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2005				
<b>b</b> Excess from 2006				
<b>c</b> Excess from 2007				
<b>d</b> Excess from 2008				
<b>e</b> Excess from 2009				





Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
<b>1</b> Program service revenue					
<b>a</b> _____					
<b>b</b> _____					
<b>c</b> _____					
<b>d</b> _____					
<b>e</b> _____					
<b>f</b> _____					
<b>g</b> Fees and contracts from government agencies					
<b>2</b> Membership dues and assessments					
<b>3</b> Interest on savings and temporary cash investments			14	94,330.	
<b>4</b> Dividends and interest from securities			14	73,975.	
<b>5</b> Net rental income or (loss) from real estate					
<b>a</b> Debt-financed property					
<b>b</b> Not debt-financed property					
<b>6</b> Net rental income or (loss) from personal property					
<b>7</b> Other investment income					2,949.
<b>8</b> Gain or (loss) from sales of assets other than inventory			18	-193,290.	
<b>9</b> Net income or (loss) from special events					
<b>10</b> Gross profit or (loss) from sales of inventory					
<b>11</b> Other revenue					
<b>a</b> _____					
<b>b</b> _____					
<b>c</b> _____					
<b>d</b> _____					
<b>e</b> _____					
<b>12</b> Subtotal. Add columns (b), (d), and (e)		0.		-24,985.	2,949.
<b>13</b> Total. Add line 12, columns (b), (d), and (e)					-22,036.

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]



**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	2000 SHS FT GLOBAL TARGET 15 4Q 2007	P	10/04/07	01/06/09
b	2000 SHS FT DOW TARGET DIV NOV 07	P	11/06/07	02/04/09
c	1000 FT BRIC #8	P	08/01/08	04/24/09
d	100 SHS APPLE INC	P	08/28/07	06/08/09
e	1000 SHS FT DOW TARGET DIV MAR 08	P	03/06/08	06/03/09
f	2000 SHS FORD MOTOR CO	P	03/18/09	07/17/09
g	1475 SHS FT GLOBAL TARGET 15 2Q 2008	P	04/04/08	07/06/09
h	1548 SHS FT DOW TARGET DIV APRIL 08	P	04/04/08	07/06/09
i	818 SHS FT DOW TARGET DIV MAY 08	P	05/06/08	08/05/09
j	1010 SHS SPECTRA ENERGY CORP	P	VARIOUS	09/24/09
k	1000 SHS TECO ENERGY INC	P	03/17/03	09/24/09
l	1500 SHS SPDR SERIES TRUST	P	03/12/09	09/25/09
m	1111 SHS FT GLOBAL TARGET 15 4Q 2008	P	10/07/08	10/27/09
n	1090 SHS FT DOW TARGET DIV 1 Q 09 09	P	02/09/09	10/22/09
o	1320 SHS FT GLOBAL TARGET 15 3Q 08	P	07/07/08	10/05/09

(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 11,062.		19,749.	-8,687.
b 7,989.		19,800.	-11,811.
c 5,120.		9,623.	-4,503.
d 13,936.		13,212.	724.
e 5,020.		9,900.	-4,880.
f 11,960.		4,425.	7,535.
g 6,811.		14,545.	-7,734.
h 7,296.		15,325.	-8,029.
i 5,051.		8,098.	-3,047.
j 19,282.		12,169.	7,113.
k 13,800.		10,435.	3,365.
l 35,719.		15,256.	20,463.
m 10,025.		10,754.	-729.
n 11,319.		7,984.	3,335.
o 8,576.		13,004.	-4,428.

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) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			-8,687.
b			-11,811.
c			-4,503.
d			724.
e			-4,880.
f			7,535.
g			-7,734.
h			-8,029.
i			-3,047.
j			7,113.
k			3,365.
l			20,463.
m			-729.
n			3,335.
o			-4,428.

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

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)

If gain, also enter in Part I, line 8, column (c)

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

3

**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	2000 SHS GREAT ATLANTIC & PAC TEA INC.	P	05/25/00	12/16/09
b	2000 SHS FORD MOTOR CO	P	03/18/09	12/29/09
c	DELTA AIRLINES INC-CASH IN LIEU	P		01/05/09
d	DELTA AIRLINES INC-CASH IN LIEU	P		02/23/09
e	DELTA AIRLINES INC-CASH IN LIEU	P		02/23/09
f	DELTA AIRLINES INC-CASH IN LIEU	P		07/02/09
g	1250 SHS ALPINE GLOBAL PREMIER PPTYS FD	P	04/30/07	10/21/09
h	2000 SHS COHEN & STEERS WRDWD RLT INCM	P	03/31/05	10/21/09
i	500 SHS AMERICAN CAP LTD	P	08/30/07	03/04/09
j	3 SHS COMDISCO HLDG CO INC	P	08/21/07	03/04/09
k	2000 SHS DWS RREEF REAL ESTATE FD II	P	08/29/03	03/04/09
l	408 SHS DELTA AIRLINES INC	P	VARIOUS	03/04/09
m	1000 SHS EBAY INC	P	08/10/06	03/04/09
n	2000 SHS HARMONIC INC	P	08/28/07	03/04/09
o	375 SHS JDS UNIPHASE CORP	P	VARIOUS	03/04/09

(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 43,994.		45,503.	-1,509.
b 19,894.		4,425.	15,469.
c 3.			3.
d 5.			5.
e 2.			2.
f 3.			3.
g 7,870.		24,501.	-16,631.
h 13,115.		37,120.	-24,005.
i 370.		20,541.	-20,171.
j 15.			15.
k 615.		28,520.	-27,905.
l 1,755.			1,755.
m 10,390.		24,295.	-13,905.
n 9,828.		17,240.	-7,412.
o 866.		26,080.	-25,214.

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) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			-1,509.
b			15,469.
c			3.
d			5.
e			2.
f			3.
g			-16,631.
h			-24,005.
i			-20,171.
j			15.
k			-27,905.
l			1,755.
m			-13,905.
n			-7,412.
o			-25,214.

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

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)

If gain, also enter in Part I, line 8, column (c)

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

3



**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	1000 SHS TALBOTS INC	P	06/02/00	03/04/09
b	2000 SHS FT DOW TARGET DIV JAN 08	P	01/07/08	03/13/09
c	1822 SHS FT S&P TARGET 24 2Q 08	P	04/04/08	03/13/09
d	1978 SHS ST S&P TARGET 24 3Q 08	P	07/07/08	03/10/09
e	2070 SHS FT GLOBAL TARGET 15 1Q 08	P	01/07/08	03/10/09
f	COHEN & STEERS QUALITY RLTY-CASH IN LIEU	P		12/29/09
g	THRU SUBURBAN PROPANE PARTNERS K-1	P	05/11/06	12/31/09
h	S&P TARGET 24 2Q 08	P	04/04/08	05/29/09
i	S&P TARGET 24 3Q 08	P	07/07/08	01/06/09
j	FT BRIC #8	P	08/01/08	01/12/09
k	FT GLOBAL TARGET 15 3Q 08	P	07/07/08	10/05/09
l	FT GLOBAL TARGET 15 4Q 08	P	10/07/08	10/15/09
m	FT GLOBAL TARGET 15 1Q 09	P	01/07/09	07/15/09
n	FT DOW TARGET DIV OCT 08	P	10/07/08	08/18/09
o	FT GLOBAL TARGET 15 1Q 09	P	01/07/09	10/15/09

(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 2,235.		27,934.	-25,699.
b 7,632.		19,800.	-12,168.
c 12,203.		17,643.	-5,440.
d 10,835.		18,647.	-7,812.
e 9,339.		20,493.	-11,154.
f 4.			4.
g			-221.
h 170.		170.	0.
i 163.		163.	0.
j 19.		19.	0.
k 64.		64.	0.
l 96.		96.	0.
m 239.		239.	0.
n 11.		11.	0.
o 83.		83.	0.

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) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			-25,699.
b			-12,168.
c			-5,440.
d			-7,812.
e			-11,154.
f			4.
g			-221.
h			0.
i			0.
j			0.
k			0.
l			0.
m			0.
n			0.
o			0.

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

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)

If gain, also enter in Part I, line 8, column (c)

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

3

**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 CAPITAL GAINS DIVIDENDS				
b				
c				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

(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 13.			13.
b			
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			13.
b			
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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	-193,290.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8 }	3	N/A

2009 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	C o n v	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
1	COPY EQUIPMENT	12/31/00	200DB	5.00	HY17	HY17	4,716.		4,716.					0.	0.
2	<del>COPY EQUIPMENT</del>	<del>01/15/01</del>	<del>200DB</del>	<del>5.00</del>	<del>HY17</del>	<del>HY17</del>	<del>8,502.</del>		<del>8,502.</del>					<del>0.</del>	<del>0.</del>
3	COMPUTER	08/28/02	200DB	5.00	HY17	HY17	2,539.		2,539.						0.
	* <del>XXXXXX 990-PF PG 1 XXXX</del>						15,757.		15,757.			0.			0.

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FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

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SOURCE	AMOUNT
OMNI BANK	20.
OPPENHEIMER	90,277.
OPPENHEIMER - OID	3,172.
OPPENHEIMER - OTHER PERIODIC INTEREST	813.
SUBURBAN PROPANE PARTNERS	48.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	94,330.

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FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
OPPENHEIMER	73,988.	13.	73,975.
TOTAL TO FM 990-PF, PART I, LN 4	73,988.	13.	73,975.

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FORM 990-PF OTHER INCOME STATEMENT 3

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DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
SUBURBAN PROPANE PARTERS ORD BUSINESS INCOME	2,818.	2,818.	
AMERICAN CAPITAL TAX REFUND	131.	131.	
TOTAL TO FORM 990-PF, PART I, LINE 11	2,949.	2,949.	

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FORM 990-PF	LEGAL FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	10,465.	0.		0.
TO FM 990-PF, PG 1, LN 16A	10,465.	0.		0.

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FORM 990-PF	ACCOUNTING FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	10,400.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	10,400.	0.		0.

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FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CONSULTING	1,100.	0.		0.
TO FORM 990-PF, PG 1, LN 16C	1,100.	0.		0.

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FORM 990-PF	TAXES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
990-PF	1,271.	0.		0.
FOREIGN TAXES PAID	238.	238.		0.
PAYROLL TAXES	6,504.	0.		0.
TO FORM 990-PF, PG 1, LN 18	8,013.	238.		0.

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FORM 990-PF	OTHER EXPENSES	STATEMENT	8
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TELEPHONE	1,944.	0.		0.
OFFICE SUPPLIES	516.	0.		0.
LICENSES AND PERMITS	5.	0.		0.
OFFICE EXPENSE	2,385.	0.		0.
UTILITIES	1,225.	0.		0.
INSURANCE	500.	0.		0.
POSTAGE & DELIVERY	121.	0.		0.
INVESTMENT EXPENSE	246.	246.		0.
ADMINISTRATIVE EXPENSES	17,800.	0.		0.
BANK FEES	12.	0.		0.
TO FORM 990-PF, PG 1, LN 23	24,754.	246.		0.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	9
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DESCRIPTION	AMOUNT
PTP INCOME AND DEDUCTIONS NOT ON TAX RETURN	3,121.
TOTAL TO FORM 990-PF, PART III, LINE 5	3,121.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	10
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
OPPENHEIMER	COST	2,545,390.	2,648,534.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,545,390.	2,648,534.

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FORM 990-PF      DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT      STATEMENT 11

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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
COPY EQUIPMENT	4,716.	4,716.	0.
COPY EQUIPMENT	8,502.	8,502.	0.
COMPUTER	2,539.	2,539.	0.
TOTAL TO FM 990-PF, PART II, LN 14	15,757.	15,757.	0.

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FORM 990-PF      EXPLANATION CONCERNING PART VII-A, LINE 8B      STATEMENT 12

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## EXPLANATION

THE STATE OF LOUISIANA DOES NOT REQUIRE A FILED COPY.

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FORM 990-PF      PART VIII - LIST OF OFFICERS, DIRECTORS  
TRUSTEES AND FOUNDATION MANAGERS      STATEMENT 13

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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JOYCE A. ROEHL 419 MAISON GROSSE POINTE FARMS, MI 48236	PRESIDENT/DIRECTOR 40.00	64,000.	0.	0.
ALLEN MC CREEDY (LEFT IN JUNE 2009) 20025 SHADY LANE ST CLAIR SHORES, MI 48080	SEC/TREAS/DIRECTOR 25.00	17,800.	0.	0.
DAVID M. KENNY 81 FORDCROFT GROSS POINTE SHORES, MI 48236	DIRECTOR 0.25	4,000.	0.	0.
MICHELE ANN WORDEN 6877 GALVIN ROAD TRAVERSE CITY, MI 49684	SEC/TREAS/DIRECTOR 15.00	11,020.	0.	0.
KATHLEEN ROEHL 41020 VISTA WOODS WAY CLINTON TOWNSHIP, MI 48038	VP/DIRECTOR 0.25	4,000.	0.	0.

ALINE UNDERHILL ORTEN FOUNDATION, INC.

72-1477797

WILLIAM ROETHEL	DIRECTOR			
5017 LAKE BLUFF ROAD	0.25	3,000.	0.	0.
W. BLOOMFIELD, MI 48323				
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		<u>103,820.</u>	<u>0.</u>	<u>0.</u>



NAME	DATE	PURPOSE	
Alzheimer's Association Greater Michigan Chapter 17220 W. 12 Mile Road Suite 100 Southfield, Michigan 48076	11/18/2009	Provides services for Alzheimer's patients and families	\$2,000
Arthritis Foundation MI Chapter 17117 W. Nine Mile-Suite 950 Southfield, MI 48075-4508	8/5/2009	To combat Arthritis	\$1,000
Arthritis Foundation MI Chapter 17117 W. Nine Mile-Suite 950 Southfield, MI 48075-4508	11/9/2009	To combat Arthritis	\$2,000
Capuchin Soup Kitchen 1820 Mt. Elliott Avenue Detroit, MI 48207-3496	4/14/2009	Meals for the needy	\$1,000
Capuchin Soup Kitchen 1820 Mt. Elliott Avenue Detroit, MI 48207-3496	10/15/2009	Meals for the needy	\$1,000
Center for the Education of Women- University of Michigan 330 E. Liberty Ann Arbor MI 48104-2289	8/10/2009	Scholarships for women	\$5,000
Children's House 5363 N. Long Lake Road Traverse City, Michigan 49684	1/2/2009	An independent Montessori school	\$1,500
Crossroads 4800 Woodward Avenue Detroit, MI 48201	4/29/2009	Program to assist young mothers and children	\$1,000
Detroit Science Center 5020 John R Street Detroit, MI 48202	8/28/2009	To inspire visitors to pursue and support careers in science	\$1,000
Detroit Science Center 5020 John R Street Detroit, MI 48202	11/19/2009	To inspire visitors to pursue and support careers in science	\$2,000
Detroit Zoological Society 8450 W. 10 Mile Road Royal Oak, MI 48067	7/30/2009	A non-profit that operates the Detroit Zoo and the Belle Isle Nature Zoo	\$1,000

NAME	DATE	PURPOSE	
Focus Hope 1355 Oakman Blvd Detroit, MI 48238	9/25/2009	Commodity Supplemental Food Program and Senior Food Program	\$1,000
Forgotten Harvest 21800 Greenfield Road Oak Park, MI 48237	2/24/2009	Rescues surplus prepared and perishable food and donates it to emergency food providers	\$2,000
Forgotten Harvest 21800 Greenfield Road Oak Park, MI 48237	10/13/2009	Rescues surplus prepared and perishable food and donates it to emergency food providers	\$1,000
Friends of Belle Isle 8109 E. Jefferson Ave Detroit, MI 48214	11/19/2009	Promotes the preservation of natural beauty, restoration and preservation of Belle Isle	\$1,000
Gleaners Community Food Bank 2131 Beaufait Detroit, MI 48207	4/17/2009	Food procurement, storage and distribution to agencies that feed the needy	\$1,000
Gleaners Community Food Bank 2131 Beaufait Detroit, MI 48207	10/19/2009	Food procurement, storage and distribution to agencies that feed the needy.	\$1,000
Grosse Pointe Animal Adoption Society 296 Chalfonte Ave. Grosse Pointe Farms, MI 48236	7/16/2009	A foster-home based, non-euthanasia organization that find suitable homes for indoor companion animals who have been abandoned or found.	\$1,000
Grosse Pointe Animal Adoption Society 296 Chalfonte Ave. Grosse Pointe Farms, MI 48236	9/28/2009	A foster-home based, non-euthanasia organization that find suitable homes for indoor companion animals who have been abandoned or found	\$1,000
Grosse Pointe Art Center Kercheval Pointe Park, MI 48230	11/16/2009	Promotes artists and art appreciation.	\$1,000
Grosse Pointe Farms Foundation 90 Kerby Road Grosse Pointe Farms, MI 48236	11/20/2009	For building new pavilion/warming building at the Pier Park	\$30,000
Henry Ford Macomb Hospital 13355 E 10 Mile Road Warren, MI 48089	11/23/2009	Free medical clinics for financial's needy	\$1,000

NAME	DATE	PURPOSE	
Juvenile Diabetes Research Foundation 120 Wall Street 19th Floor New York, NY 10005	10/2/2009	Research for cure of juvenile diabetes	\$2,000
Macomb County Interfaith Volunteer Caregivers 31654 Mound Road Warren, MI 48092	5/4/2009	Provides volunteer services to older adults and the disabled to enable them to remain in their homes	\$1,000
Macomb County Interfaith Volunteer Caregivers 31654 Mound Road Warren, MI 48092	8/24/2009	Provides volunteer services to older adults and the disabled to enable them to remain in their homes	\$1,000
Macomb County Interfaith Volunteer Caregivers 31654 Mound Road Warren, MI 48092	10/30/2009	Provides volunteer services to older adults and the disabled to enable them to remain in their homes	\$1,000
Macomb Symphony Orchestra 44575 Garfield Clinton Township, MI 48038	10/6/2009	Provides concerts, youth education presentations and chamber music ensembles to the community	\$1,000
Michigan Parkinson Foundation 30161 Southfield Rd., Suite 119 Southfield, MI 48076	11/2/2009	Provides services for Parkinson's patients and their families.	\$2,000
Paws With A Cause 4646 South Division Wayland, MI 49348	10/22/2009	Provides assistance dogs for the disabled	\$1,000
Salvation Army Matts Homeless Shelter 16130 Northland Dr Southfield, MI 48075	5/19/2009	Supports Matts Homeless Shelter	\$1,000
Salvation Army Denby Center for Children & Family Services 16130 Northland Dr. Southfield, MI 48075	11/23/2009	Children and Family Services	\$2,500

NAME	DATE	PURPOSE	
Services for Older Citizens Meals on Wheels Program 17150 Waterloo, Suite 300 Grosse Pointe, MI 48230	5/9/2009	To provide meals for older citizens who are in need	\$1,000
Services for Older Citizens Meals on Wheels Program 17150 Waterloo, Suite 300 Grosse Pointe, MI 48230	7/24/2009	To provide meals for older citizens who are in need	\$1,000
Services for Older Citizens Meals on Wheels Program 17150 Waterloo, Suite 300 Grosse Pointe, MI 48230	11/19/2009	To provide meals for older citizens who are in need	\$2,000
St John Hospital Foundation 22101 Moross Road Office Building - Suite 102 Detroit, MI 48236	11/20/2009	Nephrology research	\$2,000
Toys for Tots 90 Kerby Road Grosse Pointe Farms, MI 48236	11/20/2009	Provides toys for needy tots during holiday season.	\$1,000
Turning Point, Inc P O Box 1123 Mt. Clemens, MI 48046	3/13/2009	Provides shelter, counseling, and advocacy services to survivors of domestic violence	\$1,000
		TOTAL	\$80,000

# Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► File a separate application for each return.

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
  - If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).
- Do not complete Part II unless** you have already been granted an automatic 3-month extension on a previously filed Form 8868.

**Part I Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

**Electronic Filing (e-file).** Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 6069, or 8870, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on e-file for Charities & Nonprofits.

Type or print	Name of Exempt Organization	Employer identification number
	ALINE UNDERHILL ORTEN FOUNDATION, INC.	72-1477797
	Number, street, and room or suite no. If a P.O. box, see instructions. ONE GALLERIA BOULEVARD, NO. 1100	
File by the due date for filing your return. See instructions	City, town or post office, state, and ZIP code. For a foreign address, see instructions. METAIRIE, LA 70001	

Check type of return to be filed (file a separate application for each return):

- |   |   |                                    |
|---|---|------------------------------------|
| <input type="checkbox"/> Form 990               | <input type="checkbox"/> Form 990-T (corporation)                 | <input type="checkbox"/> Form 4720 |
| <input type="checkbox"/> Form 990-BL            | <input type="checkbox"/> Form 990-T (sec. 401(a) or 408(a) trust) | <input type="checkbox"/> Form 5227 |
| <input type="checkbox"/> Form 990-EZ            | <input type="checkbox"/> Form 990-T (trust other than above)      | <input type="checkbox"/> Form 6069 |
| <input checked="" type="checkbox"/> Form 990-PF | <input type="checkbox"/> Form 1041-A                              | <input type="checkbox"/> Form 8870 |

JOYCE A. ROEHL

- The books are in the care of ► 35745 BEATTIE DRIVE - STERLING HEIGHTS, MI 48312

Telephone No. ► 586-838-2128

FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐ . If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension will cover.

- 1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2010, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☒ calendar year 2009 or
- ☐ tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_.

- 2 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	1,990.
b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	1,240.
c <b>Balance Due.</b> Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	750.

**Caution.** If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form 8868 (Rev 4-2009)

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II and check this box ☒ **X**

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

- If you are filing for an **Automatic 3-Month Extension**, complete only Part I (on page 1)

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed)

Type or print  File by the extended due date for filing the return. See instructions	Name of Exempt Organization	Employer identification number
	ALINE UNDERHILL ORTEN FOUNDATION, INC.	72-1477797
	Number, street, and room or suite no. If a P.O. box, see instructions	For IRS use only
	ONE GALLERIA BOULEVARD, NO. 1100	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	METAIRIE, LA 70001	

Check type of return to be filed (File a separate application for each return)

- ☐ Form 990    ☐ Form 990-EZ    ☐ Form 990-T (sec 401(a) or 408(a) trust)    ☐ Form 1041-A    ☐ Form 5227    ☐ Form 8870  
☐ Form 990-BL    ☒ Form 990-PF    ☐ Form 990-T (trust other than above)    ☐ Form 4720    ☐ Form 6069

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

JOYCE A. ROEHL

- The books are in the care of ☒ 35745 BEATTIE DRIVE - STERLING HEIGHTS, MI 48312

Telephone No ☒ 586-838-2128

FAX No. ☐

- If the organization does not have an office or place of business in the United States, check this box ☐

- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ☐. If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

4 I request an additional 3-month extension of time until NOVEMBER 15, 2010

5 For calendar year 2009, or other tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

6 If this tax year is for less than 12 months, check reason: ☐ Initial return ☐ Final return ☐ Change in accounting period

7 State in detail why you need the extension

**ADDITIONAL TIME IS NEEDED TO ACQUIRE THE INFORMATION NECESSARY TO PREPARE A COMPLETE AND ACCURATE RETURN.**

8a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	8a	\$	750.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868.	8b	\$	750.
c	<b>Balance Due.</b> Subtract line 8b from line 8a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	8c	\$	0.

**Signature and Verification**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form

Signature ☒ Ann Marie Moss Title ☒ CPA

Date ☒ 8/6/10

Form 8868 (Rev 4-2009)