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# SCANNED AUG 2 7 2010

Form **990-PF** 

### **Return of Private Foundation**

or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation
Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

OMB No 1545-0052

	ent of the Treasury Revenue Service		Freated as a Privat be able to use a copy of this		rting requirements.	2009	
For cal	endar year 2009	, or tax year beginning MAY	1, 2009	, and ending	APR 30, 2010		
G Che	G Check all that apply: Initial return Initial return of a former public charity Final return  Amended return Address change Name change						
Use the IRS Name of foundation A Employer identification number							
	wise, ANNMA	RIE FOUNDATION			23-7301323		
pri or ty	pe. N4660	d street (or PO box number if mail is not de	elivered to street address)	Room/suite	8 Telephone number 715-262-80	00	
See Sp Instruc	Gity or to	wn, state, and ZIP code		<u> </u>	C If exemption application is p	ending, check here	
	PRESC	OTT, WI 54021			D 1. Foreign organizations	s, check here	
	ck type of organiz				Foreign organizations me check here and attach co	mputation Lest,	
		<del></del>	Other taxable private founda		E If private foundation state	tus was terminated	
		l assets at end of year   J Account	ng method: X Cash cher (specify)	Accrual	under section 507(b)(1)	•	
(Iron	n Part II, col. (c)	5,149,979. (Part I, colu		basis )	F If the foundation is in a ( under section 507(b)(1)		
	—— (The total of am	Revenue and Expenses ounts in columns (b), (c), and (d) may not all the amounts in column (a))	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net	(d) Disbursements for charitable purposes (cash basis only)	
$\overline{}$	<del></del>	gifts, grants, etc., received	17,500.			(dasir dasis drily)	
;		if the foundation is not required to attach Sch. B					
;	Interest on cours	as and temporary	149.	149.		STATEMENT 1	
4	4 Dividends and	interest from securities	106,291.	106,291.	106,291.	STATEMENT 2	
!	<b>5a</b> Gross rents						
	b Net rental incom	<del></del>	21 176				
의 '	<ul> <li>Gross sales price</li> </ul>	from sale of assets not on line 10 e for all 2,546,407.	21,176.				
Revenue	D assets on line 6a 7 Capital gain net	ncome (from Part IV, line 2)		21,176.		<u></u>	
&   £	8 Net short-term	•		/	N/A		
	9 Income modif	ications					
10	Oa and allowances	returns 11,342.				STATEMENT 3	
11	CGOSS DIOTEO	450 L	11 240		11 242	COLUMN A	
			11,342.		11,342.	STATEMENT 4	
g	1 Other income	es 2 hi Quan R	156,458.	127,616.	117,782.		
101		f officers, directors, trustees, etc	0.	0.	0.	0.	
<del> </del>				, , ·		· · · · · · · · · · · · · · · · · · ·	
1!	5 Jenaton plans	e salarres and wages , employee benefits					
9 10	6a Legal fees		4 505	4 505	4 505		
ğ	<b>b</b> Accounting fe		1,727. 15,902.	1,727. 15,902.	1,727. 15,902.	0.	
E I	c Other professi  Interest	onalitees STMT 6	15,902.	15,902.	13,302.		
and Administrative Expens				<del></del>			
19 ist		ind depletion					
E 20		•					
<b>ĕ</b> 2	1 Travel, confer	ences, and meetings					
E 2			105	105	105		
			105.	105.	105.	0.	
erat 2	•	ng and administrative	17,734.	17,734.	17,734.	0.	
8 2		d lines 13 through 23 , gifts, grants paid	220,803.	17,734.	17,734.	220,803.	
20		es and disbursements.					
	Add lines 24 a		238,537.	17,734.	17,734.	220,803.	
2	7 Subtract line 2	26 from line 12:					
		ue over expenses and disbursements	-82,079.	100 000			
		nt income (if negative, enter -0-)		109,882.	100,048.	<u> </u>	
	· valastea net	income (if negative, enter -0-)			1 100,040.	L	

For	m 99	0-PF (2009) ANNMARIE FOUNDATION			7301323 Page 2	
Р	art	Balance Sheets Attached schedules and amounts in the description	Beginning of year		of year	
_		Column should be for the or year amounts only	(a) Book Value 110,509.	(b) Book Value	(c) Fair Market Value	
		Cash - non-interest-bearing	110,509.	206,005.	206,005.	
		Savings and temporary cash investments				
	3	Accounts receivable				
		Less: allowance for doubtful accounts ►  Pledges receivable ►				
		Less: allowance for doubtful accounts				
	5	Grants receivable			<del> </del>	
	6	Receivables due from officers, directors, trustees, and other		<del></del>		
	Ĭ	disqualified persons				
	7	Other notes and loans receivable				
	`	Less; allowance for doubtful accounts	-			
S.	8	Inventories for sale or use				
Assets		Prepaid expenses and deferred charges				
Ą		Investments - U.S. and state government obligations STMT 8	832,213.	180,748.	184,001.	
	i i	Investments - corporate stock STMT 9	3,632,103.	3,434,536.	3,370,289.	
	ı	Investments - corporate bonds STMT 10	673,948.	1,345,405.	1,389,684.	
	i	Investments - land, buildings, and equipment basis				
		Less accumulated depreciation				
	12	Investments - mortgage loans				
	13	Investments - other				
	14	Land, buildings, and equipment basis ▶		·		
		Less accumulated depreciation			•	
	15	Other assets (describe ►				
	16	Total assets (to be completed by all filers)	5,248,773.	5,166,694.	5,149,979.	
	17	Accounts payable and accrued expenses				
	18	Grants payable				
es	19	Deferred revenue				
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons				
<u>a</u>	21	Mortgages and other notes payable				
	22	Other liabilities (describe				
				0		
	23	Total liabilities (add lines 17 through 22)	0.	0.		
		Foundations that follow SFAS 117, check here				
ç		and complete lines 24 through 26 and lines 30 and 31.				
Net Assets or Fund Balances	24	Unrestricted				
Sala	25 26	Temporarily restricted Permanently restricted				
ğ	20	Foundations that do not follow SFAS 117, check here				
Ē		and complete lines 27 through 31.			1	
5	27	Capital stock, trust principal, or current funds	1,103,122.	1,103,122.	1	
ets	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
Ass	29	Retained earnings, accumulated income, endowment, or other funds	4,145,651.	4,063,572.		
e	30	Total net assets or fund balances	5,248,773.	5,166,694.		
Z	້			0,200,0010	1	
_	31	Total liabilities and net assets/fund balances	5,248,773.	5,166,694.		
	Part III Analysis of Changes in Net Assets or Fund Balances					
_						
1		I net assets or fund balances at beginning of year - Part II, column (a), line 3 st agree with end-of-year figure reported on prior year's return)	U	1	5.248 773.	
2	•	r amount from Part I, line 27a		1 2	5,248,773.	
_				, <del>-</del>		

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	5,248,773.
2	Enter amount from Part I, line 27a	2	-82,079.
3	Other increases not included in line 2 (itemize)	3	0.
4	Add lines 1, 2, and 3	4	5,166,694.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	5,166,694.
_			

Part IV   Capital Gains	and Losse	s for Tax on In	vestment	Income						
(a) List and describe the kind(s) of property sold (e.g., real estate,					( <b>b)</b> I	How acquired ( P - Purchase D - Donation (		(c) Date : (mo., d	acquired ay, yr.)	(d) Date sold (mo., day, yr.)
18 CORPORATE STOC	KS						P '	VARI	ous	VARIOUS
b								•		
C				_						
_d		<del> </del>								
_e					<u> </u>					
(e) Gross sales price		ciation allowed allowable)	plus e	t or other basis xpense of sale					ain or (loss s (f) minus	(g)
a 2,546,407.				2 <u>,525,23</u>	1.					21,176.
b					_					<del></del>
С									_	<del></del>
<u>d</u>										
е										
Complete only for assets showing							(I)	Gains (C	ol. (h) gain	minus
(i) F.M.V. as of 12/31/69		justed basis f 12/31/69		cess of col. (1) col. (1), if any			COI.		not less tha (from col. (	(h))
a										21,176.
b										
С										
d									·	
e										
		∫ If gain, also enter	ın Part I line	7	ন					
2 Capital gain net income or (net ca		If (loss), enter -0-	ın Part I, line		<i>)</i>	2			_	21,176.
3 Net short-term capital gain or (los	•	n sections 1222(5) and	1 (6):		٦١					
If gain, also enter in Part I, line 8,	column (c).				١١					21,176.
If (loss), enter -0- in Part I, line 8  Part V   Qualification U	ndor Coot	on 4040/o) for	Doduood	Tay on Not	101	oct m	ont Inc	omo		21,170.
If section 4940(d)(2) applies, leave the Was the foundation liable for the sect if "Yes," the foundation does not qual 1. Enter the appropriate amount in 6	tion 4942 tax of	on 4940(e). Do not cor	nplete this pa	rt.		_				Yes X No
(a)	Jacin Columni 10		0.00113 001010	maxing uny ontro	(c)		•	7	-	(d)
Base period years	,,,,,\ A	(b) djusted qualifying disti	ributions	Net value of no			use assets			butión ratio vided by col. (c))
Calendar year (or tax year beginnii	19 111)		7,647.				7,900		(coi. (b) di	.064177
2008		331	5,042.				9,382			.069232
2006	<del></del>		3,047.		<u> </u>	, <u>53</u>	$\frac{3,302}{8,326}$	<del>' </del>		.081304
<del></del>			5,841.				9,561			.091217
2005			$\frac{3,041}{3,270}$ .				$\frac{3,301}{0,217}$			.099816
2004	1	300	5,270.			, 0 5	0,211	+		.033010
2 Total of line 1, column (d)								2		.405746
3 Average distribution ratio for the	S-voor boso por	and - drude the total o	n line 2 by 5	or by the number	of ve	are		<del>  -</del>		
			ii iiiie z by J,	or by the number	UI YE	aış		3		.081149
the foundation has been in exister	ice ii iess tilali	J years			-			H		
4 Enter the net value of noncharitab	le-use assets f	or 2009 from Part X, I	ne 5					4		4,702,597.
5 Multiply line 4 by line 3			5		381,611.					
6 Enter 1% of net investment incom	ne (1% of Part	I, line 27b)						6		1,099.
7 Add lines 5 and 6	,	,,						7		382,710.
	_ ,									
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.		•	•	<u> </u>	•					

Part VI   Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)   Date of ruling or determination letter.	Form 990-PF (2009) ANNMARIE FOUNDATION		-7301			Page 4
Dates to ruling or determination letter:	Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or	<u>4948</u>	- see i	nstru	ıctio	ns)
b Domestic foundations hat meet the section 4940(e) requirements in Part V, check here	1a Exempt operating foundations described in section 4940(d)(2), check here ▶ and enter "N/A" on line 1.					
of Part, 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 4-2)  3 Add lines 1 and 2  3 L 198.  3 L 198.  4 0 0.  5 Tax based on investment income, Subtract line 4 from line 3. If zero or less, enter 4-0  5 Tax based on investment income, Subtract line 4 from line 3. If zero or less, enter 4-0  5 Credits Payments:  4 00 0.  5 Exempt foreign organizations - Lax withheld at source 1 (ax paid with application for extension of time to file Form 8868)  6 Exempt foreign organizations - Lax withheld at source 1 (ax paid with application for extension of time to file Form 8868)  6 Exempt foreign organizations - Lax withheld at source 1 (ax paid with application for extension of time to file Form 8868)  6 Exempt foreign organizations - Lax withheld at source 1 (ax paid with application for extension of time to file Form 8868)  6 Exempt foreign organizations - Lax withheld at source 1 (ax paid with application for extension of time to file Form 8868)  6 Exempt foreign organizations - Lax withheld at source 1 (ax paid with application for extension of time to file Form 8868)  7 Turble Company organizations - Lax withheld at source 1 (ax paid with application for extension of time to file Form 8868)  8 Extension and payments. Add like sets through 6d  8 Enter any peakity for underpayment of estimated tax. Check here 1 if Form 2220 is attached  8 Extension and payments. Add like sets through 6d  8 Enter any peakity for underpayment of estimated tax. Payment organization and payments. Add like sets through 6d lik	Date of ruling or determination letter: (attach copy of letter if necessary-see instructions)					
a All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)  2	b Domestic foundations that meet the section 4940(e) requirements in Part V, check here and enter 1%	1			2,1	98.
2 Tax under section S11 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter-0-) 3 Add lines 1 and 2 4 Subhita A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter-0-) 5 Tax based on investment income. Subtract line 4 from line 3, 17 zero risss, enter-0- 5 Credits/Payments: 2 2009 estimated tax payments and 2008 overpayment credited to 2009 6 Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due, if the total of lines 5 and 8 is more than the lotal of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line? It is more than the total of lines 5 and 8, enter the amount overpaid 11 During the tax year, did the foundation attempt to influence any nationals, state, or local legislation or did it participate or intervene in any principal or intervene in a structure of the state of the structure of the	of Part I, line 27b		T		-	
3 Add lines 1 and 2  Subtitle A (morone) lax (domestic section 4947(a)(1) rusts and taxable foundations only. Others enter -0-)  5 Tax based on investment income. Subtract line 4 from line 3, if zero or less, enter -0-  6 Crodist/Payments:  6 Crodist/Payments  7 Color and with application for extension of time to file (Form 8868)  6 Each of the state of	c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		1			
Subtlack (income) tax (formests exclore 4947(a)(1) justs and taxable foundations only. Others enter -0 -	2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2			-	
Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-6 6 Credit/Payments: 2 2009 estimated tax payments and 2008 overpayment credited to 2009 6 Exempl foreign organizations - Lax withheld at source 6 Tax paid with application for extension of time to file (Form 8868) 6 Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax die. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax die. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax die. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment, life no? is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 is be; Credited to 2010 estimated tax ▶ Refunded ▶ 11  Part VII-A Statements Regarding 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 political campaign? 1 but is spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1 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 Enorm 1120-POL for this year? 2 bit the loundation life Form 1120-POL for this year? 3 cline the amount (if any) paid by the foundation during the year (or political expenditures (section managers. ▶ \$ 0 . 2 Has the foundation in Page 3 or political expenditures (section 4945) imposed during the year? 3 life the amount (if any) paid by the foundation for the activities of the changes 4 but the foundation have an entire business gross moorm of \$1,000 or or more during the year? 4 life "Yes," attach a defailed description of the activities 5 life the situation of the situation of the page 3 or or more during the year? 5 life's	3 Add lines 1 and 2	3	T		2,1	98.
5 7 2, 196. 6 Credits/Payments: 2 2009 estimated tax payments and 2008 overpayment credited to 2009 6 Exempt foreign organizations - tax withheld at source 7 Total credits and application for extension of time to this (Form 8868) 6 Backup withholding erroneously withheld 7 Total credits and payments. Add it inses a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount ower 10 Overpayment, filtine 7's more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: Credited to 2010 estimated tax 11 Enter the amount of line 10 to be: 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 political campaign? 13 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? 14 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 influence any national, state, or local legislation or did it participate or intervene in any political campaign? 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 or intervene in the contraction of the activities or did it participate or intervene in any activities. 18 During the tax year. did the foundation intervene in any activities or the activities or did it participate or intervene in any activities. 19 C. 2 Has the foundation for the Activities or the activities or the changes. S. S. O 2 Has the foundation have unrelated description of the activities or the changes. S. S. O 2 Has the foundation have unrelated business goes to must the acti	4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4				0.
6 Credits/Payments: a 2009 estimated tax payments and 2008 overpayment credited to 2009 b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Ga		5			2,1	98.
a 2009 estimated tax payments and 2008 overpayment credited to 2009 b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 7 Total credits and payments. Add these 6a through 60 8 Enter any penalty for underpayment of estimated tax. Check here in If Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 To extract. If line 7 is more than the total of lines 5 and 8, enter the amount owed 10 Tenter the amount of lines 5 and 8 is more than line 7, enter amount owed 11 Enter the amount of line 10 to be: Oredited to 2010 estimated tax ▶ Refunded 111  Part VII-A Statements Regarding Activities 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 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, affach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities 16 Child the foundation (left and 1120-POL for this year? 17 In the enable of the enable of the connection with the activities and copies of any materials published or distributed by the foundation in Polymoush of the activities and copies of any materials published or distributed by the foundation in Polymoush of the activities 18 Tyes, "attach a detailed description of the activities and copies of any materials published or distributed by the foundation help from 1120-POL for this year? 2 Lists the foundation help form 1120-POL for this year? 3 Has the foundation help form 1120-POL for this year? 4 Tyes, "attach a detailed description of the activities 3 Has the foundation help any activities that have not previously been reported to the IRS?  If Yes, "attach the statement required			1			
b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 58 athrough 66 8 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: Credited to 2010 estimated tax. 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 patient of the 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 patient of the activities and copies of any materials published or distributed by the foundation in connection with the activities 1a During the tax year. Add the foundation in connection with the activities and copies of any materials published or distributed by the foundation in connection with the activities of the activities and copies of any materials published or distributed by the foundation in connection with the activities 1b If the amount (if any) of tax on political expenditures (section 4955) imposed during the year:  (1) On the foundation file Form 1120-P0L for this year?  6 Enter the reminiburement (if any) of tax on political expenditures (section 4955) imposed during the year:  (1) On the foundation made any changes, not previously reported to the IRS; in its governing instrument, articles of incorporation, or bylaws, or other smill artistiments? If *Yes*, *Tatech a detailed description of the activities  1a Enter the reminiburement (if any) of tax on political expenditure tax imposed on foundation bylaws, or other smill artistiments? If *Yes*, *Tatech a	1 1 4 600					
c Tax paid with application for extension of time to file (Form 8868)  d Backup withholding erroneously withheld  7 Total cricia and payments. Add lines 6s through 6d  8 Enter any penalty for underpayment of estimated tax. Check here I of Form 2220 is attached  9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed  10 Overpayment. If line 7 is more than line 1, enter amount owed  10 The first the amount of line 10 to be: Credited to 2010 estimated tax   11 Enter the amount of line 10 to be: 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 political campaign?  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?  13 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?  14 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 Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for delimition)?  16 If the answer is "Yes" to 1 a or 10, attach a detailed description of the activities and copies of any materials published or distributed by the foundation file Form 1120-P0. for this year?  16 Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. It "Yes," attach a detailed description of the activities  18 Has the foundation engaged in any activities that have not previously bean reported to the IRS?  19 Yes, "attach a detailed description of the activities  19 If "Yes," attach as titled a tax return on Form 990-If to the year?  19 Yes," attach the statement required by General Instruc		7				
d Backup withholding erroneously withhold 7 Total credits and payments. Add lines 6s a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: Credited to 2010 estimated tax ▶ Refunded 11    Part VIII-A   Statements Regarding 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 political campaign? 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? 1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b If the answer is "Yes" to 1 aor 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities 1c Did the foundation. In a connection with the activities 1c Did the foundation. In a connection with the activities 1c Did the foundation. In a connection with the activities 1c C Did foundation. In a connection with the activities 1c C Did foundation. In a connection with the activities 1c C Did foundation. In a connection with the activities 1c C Did foundation. In a connection with the activities 1c C Did foundation. In a connection with the activities 1c C Did foundation. In a connection with the activities 1c C Did foundation. In a connection with the activities 1c C Did foundation. In a connection with the activities 1c C Did foundation. In a connection with the activities of the foundation of the activities of the foundation and any changes, not previously reported to the IRS? 1f "Yes," attach a conformed copy of the changes 1 Life the foundation have unrelated b		7				
7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here		┨				
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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)  WI  b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation  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	remain in the governing instrument?			6		
8a Enter the states to which the foundation reports or with which it is registered (see instructions)  WI  b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation  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	7 Did the foundation have at least \$5,000 in assets at any time during the year?			7	X	
WI b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation  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	If "Yes," complete Part II, col (c), and Part XV			1		
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 Enter the states to which the foundation reports or with which it is registered (see instructions)					
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	WI					
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 If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)					
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	of each state as required by General Instruction G? If "No," attach explanation					
year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV						
					L	X
						X

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11 At any time during the year, did the foundation, directly or indirectly, own a coalrolled entity within the meaning of section \$12(1)(1)(1)(1)(1)(1)(1)(1)(1)(1)(1)(1)(1)(	Pa	t VII-A   Statements Regarding Activities (continued)			
12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?  13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?  15 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?  17 Telephone in ou. ► 71.5 − 8.31 − 4.2.27  18 The books are in orie of ▶ M&I TRUST INVESTMENT MGMT Telephone in ou. ► 71.5 − 8.31 − 4.2.27  19 Located at ▶ 30.1 WATER STREET, EAU CLAIRE, WI ZiP+4 ▶ 54703  19 Seation 4947 ((i)) innexempt charable trusts thing form 990-Fin live of form 1941- Chack here and enter the amount of tax-exempt interest reserved or accrued during the year  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.  10 During the year did the foundation (either directly or indirectly):  11 Gingale in the sale or exchange, or lessing of property with a disqualified person?  12 Borrow money from, lend money to, or otherwise extend credit to (or accept it from) as disqualided person?  13 Furnish goods, services, or facilities to (or accept them from) a disqualified person?  14 Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  15 Furnish goods, services, or facilities to (or accept them from) a disqualified person?  16 Agree to pay money or property to a government official? (Exception, Check 'No' of the foundation angaged to make a ginant to or to employ the official for a period after termistion of government service, iteriminating within 90 days; or year of year or year in any of the acts fail to qualify under the exceptions described in Regulations section 33.4941(0)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?  2 Taxes on failure to distribute moome (section 4942) (does not applying the provisions of section 4942(2) (2) result in more than a 2% d	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
August 17, 2008?  12		section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		_X_
13	12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before			
Website address ▶ N/A  14 The books are in care of ▶ M£1 TRUST INVESTMENT MGMT    Telephone no. ▶ 715-831-4227   Telephone no. ▶ 715-831-427   Telephone n		August 17, 2008?	12		X
14. The books are in care of ▶ MET TRUST INVESTMENT MGMT Located at ▶ 301 WATER STREET, EAU CLAIRE, WI  210+4 ▶ 54703  15. Section 4947(a)(1) nonexempt charitable trusts fining form 990-PF in leu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year  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.  15. During the year dol the foundation (either directly or indirectly):  (17. Engage in the sale or exchange, or lessing of property with a disqualified person?  (28. Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (39. Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (40. Pay compensation to, or pay or remburse the expenses of, a disqualified person?  (50. Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or form)  1	13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Located at M 301 WATER STREET BAU CLATRE WI  15 Section 4947(a)(1) nonexempt chanable 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  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.  15 N/A  File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  16 During the year did the loundation (either directly or indirectly):  (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation agreed to make a grain to or to employ the official for a period after termination of government service, it terminating within 90 days.)  15 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)?  16 If any answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 4942(a)(3) or 4942(l)(3)):  17 If Yes, its the years beginning in 2009?  18 Aft the end of axy year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before the first day of the tax year beginning in 2009?  18 If Yes, 'did it have excess business holdings in 2009 as a result of (1) any purchase		Website address ► N/A			
Located at N 301 WATER STREET, EAU CLAIRE, WI  15 Section 4947(a)(1) nonexempt charable 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  Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required  File Form 4720 it any items is checked in the "Yes" column, unless an exception applies.  10 During the year did the foundation (either directly or indirectly):  (1) Engage in the sale or exchange, or leasing of property with a disqualited person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)  a disqualited person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualitied person?  (4) Pay compensation to, or pay or remibures the expenses of, a disqualitied person?  (5) Transfer any income or assets to a disqualitied person (or make any of either available for the benefit or use of a disqualitied person)?  (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, il terminating within 90 days.)  b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fall 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)?  7 Taxes on faiture to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(3):)  8 Aft the end of ax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?  11 Yes, list the years See instructions.)  12 Taxes on faiture to distribute income (section 4942) (does not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of asset) to the year's undistributed income? (If applying section 4	14	The books are in care of ► M&I TRUST INVESTMENT MGMT  Telephone no. ► 715-8	<del>31-4</del>	227	
and enter the amount of tax-exempt interest received or accrued during the year  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.  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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception, Check 'No' of 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.)  1b If any answer is Yes' to Ta(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53.491((f)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?  1c			<del>4703</del>		
and enter the amount of tax-exempt interest received or accrued during the year  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.  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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception, Check 'No' of 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.)  1b If any answer is Yes' to Ta(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53.491((f)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?  1c	15			$\overline{}$	$\Box$
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  1 a 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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person or make any of either available for the benefit or use of a disqualified person?  (6) Agree to pay money or property to a government official? (Exception, Check 'No' 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.)  b) If any narwer is 'Yes' to Tail-16, did any of the acts fail to quality 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)?  7 Taxes on faiture to distribute microme (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(jo) 47 4942(jo)(5):  2 Taxes on faiture to distribute microme (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(jo) 47 4942(jo)(5):  2 Taxes on faiture to distribute microme (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(jo) 47 4942(jo)(5):  2 Taxes on faiture to distribute microme (section 4942) (does not apply for years the foundation of assets) to the years of 4942(jo) 47 4942(jo)(5):  8 At the end of tax year 2909, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?  1 Yes, Si the years  3 Did the foundation hold more than a 2% di		• • • • • • • • • • • • • • • • • • • •	N	/A	
File Form 4720 if any item is checked in the "Ves" column, unless an exception applies.    A Dump the year did the foundation clerk directly or indirectly:	Pa				
1a During the year did the foundation (either directly):  (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept the from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  (6) Agree to pay money or property to a government official? (Exception, Check 'No' 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.)  b If any answer is "Yes" to Ta(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(g)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?  Organizations relying on a current notice regarding disaster assistance close here  e Did the foundation engage in a prior year in any of the acts fearling of the acts fail to qualify under the exceptions described in Regulations section 53.4941(g)-3 or in a current notice regarding disaster assistance close here  e Did the foundation engage in a prior year in any of the acts fearling disaster assistance close here  be of the tist day of the tax year beginning in 2009?  1 Taxes on failure to distribute incomer (settion 4942 (does not apply for years the foundation was a private operating foundation defined in section 4942(a)(3) or 4942(a)		· · · · · · · · · · · · · · · · · ·		Yes	No
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend money (b, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation any each of make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)  b If lany answer is 'Yes' to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 54,941(0)-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  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?  Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(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'  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).  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  Are the provis	1a	-			-
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any) of either available for the benefit or use of a disqualified person (or make any) of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception, Check No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, it ferminating within 90 days.)  b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.494 (1d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?  Cyanizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)?  N/A  Toganizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)?  If yes a lating to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(a)(3) or 4942(b)(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 windistributed income? (If applying section 4942(a)(2) feating to incorrect valuation of assets) to the year' sundistributed income? (If applying section 4942(a)(2) to all years listed, answer No* and attach statement - see instructions.)  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  In the provisions of section 4942(a)(2) are being applied to any of the year streat in any business enterprise at any time during the year?					
a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  (6) Agree to pay money or property to a government official? (Exception, Check 'No' 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.)  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(6)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?  N/A  Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)?  N/A  Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)?  N/A  Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)?  N/A  Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)?  N/A  Organizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)?  A At the end of tax year beginning in 2009?  1c X  X  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 \( \)  A 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 sistement - see instructions.)  If 'Yes,' did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified person					
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  (6) Agree to pay money or property to a government official? (Exception. Check No. 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.)  b If any answer is "Yes" to 1a(1)-(6), did any of the acts fall 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)?  Corganizations relying on a current notice regarding disaster assistance (see page 20 of the instructions)?  N/A  1b  Takes 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, this the years					
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  (6) Agree to pay money or property to a government official? (Exception. Check 'No' 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.)  b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fall 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)?  N/A  Organizations relying on a current notice regarding disaster assistance check here  b Coll 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?  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(n)(3) or 4942(n)(3)		· · ·			
(6) Transter any income or assets to a disqualified person)?  (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.)  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 53,491(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 (see page 20 of the instructions)?  In a current notice regarding disaster assistance (see page 20 of the instructions)?  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 \in \text{ 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.)  If If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  In a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  If Yes \in					
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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   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.)  c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	2				
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statement - see instructions.)  c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	D				
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during the year?  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)  1	C	i the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			
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had not been removed from jeopardy before the first day of the tax year beginning in 2009?			48		<u> </u>
had not been termoved them judged by belove the mot day of the day judged beginning in 2000	b				y
				DE /	

Form 990-PF (2009) ANNMARIE FOUNDATION	4700 May Do 5		23-73013	23	Page 6		
Part VII-B   Statements Regarding Activities for Which F	-orm 4/20 May Be F	Required (contin	uea)				
5a During the year did the foundation pay or incur any amount to:	10.157.330		es X No		ı		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section			8 (A) NO		- I .		
(2) Influence the outcome of any specific public election (see section 4955); o	r to carry on, directly or indire		s X No				
any voter registration drive?	•		8 X No				
(3) Provide a grant to an individual for travel, study, or other similar purposes		Y6	NO لیمیا 88		ŀ		
(4) Provide a grant to an organization other than a charitable, etc., organization	n described in section	—, <u>, , , , , , , , , , , , , , , , , , </u>	s X No				
509(a)(1), (2), or (3), or section 4940(d)(2)?		<del></del>	8 LA NO				
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f		<b>₩</b>				
the prevention of cruelty to children or animals?			es X No				
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und		n Regulations	NT / 7	_	İ		
section 53.4945 or in a current notice regarding disaster assistance (see instru	•		N/A	5b			
Organizations relying on a current notice regarding disaster assistance check h					'		
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr		. —					
expenditure responsibility for the grant?		[/A	es L No				
If "Yes," attach the statement required by Regulations section 53.4945							
6a Did the foundation, during the year, receive any funds, directly or indirectly, to p	pay premiums on	<b>_</b>	<b>.</b>				
a personal benefit contract?		Ye	es X No	_	-   <sub>2</sub> -		
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?		-	6b	<u> </u>		
If "Yes" to 6b, file Form 8870.		<u> </u>	(TE)				
7a At any time during the tax year, was the foundation a party to a prohibited tax s		Ye	es X No				
b If yes, did the foundation receive any proceeds or have any net income attribute			N/A	7b	<del></del>		
Part VIII Information About Officers, Directors, Truston Paid Employees, and Contractors		nagers, Highly	<i></i>				
1 List all officers, directors, trustees, foundation managers and their		I (-) Componentian	(d)	T	<u></u>		
(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	acco	Expense unt, other owances		
		_	_		_		
SEE STATEMENT 11		0.	0.	<u> </u>	<u>0.</u>		
				i			
				ļ			
				<u> </u>			
2 Compensation of five highest-paid employees (other than those inc		enter "NONE."	(4)	T			
(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	acco	Expense unt, other owances		
NONE							
			_				
			-				
		<u> </u>					
Total number of other employees paid over \$50,000			<u>▶</u>		0		

Form 990-PF (2009) ANNMARIE FOUNDATION		7301323 Page 7
Part VIII Information About Officers, Directors, Trustees, Foun Paid Employees, and Contractors (continued)	dation Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, er	nter "NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
· · · · · · · · · · · · · · · · · · ·		
	<del></del>	
Total number of others receiving over \$50,000 for professional services  Part IX-A   Summary of Direct Charitable Activities		▶ 0
List the foundation's four largest direct charitable activities during the tax year. Include relevant standards of organizations and other beneficiaries served, conferences convened, research papers p	atistical information such as the produced, etc.	Expenses
1 N/A		
2		
3		
3	"	
4		
Dort IV P. C		
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 NONE		
		0.
2		
All other program-related investments. See instructions.  3 NONE		
1 1101111		
		0.
Total. Add lines 1 through 3	<b>&gt;</b>	0.
		Form <b>990-PF</b> (2009)

Р	Part X Minimum Investment Return (All domestic foundations must complete this p	art Foreign four	ndations,	see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities		1a	4,615,953. 158,257.
b	Average of monthly cash balances		1b	158,257.
C	Fair market value of all other assets		1c	
d	Total (add lines 1a, b, and c)		1d	4,774,210.
е	Reduction claimed for blockage or other factors reported on lines 1a and	[		<del>-</del> ·
	1c (attach detailed explanation)	0.		
2	Acquisition indebtedness applicable to line 1 assets		2	0.
3	Subtract line 2 from line 1d		3	4,774,210.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	ľ	4	71,613.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4		5	4,702,597.
6	Minimum investment return. Enter 5% of line 5	[	6	235,130.
P	Part XI  Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operations or complete this part.)	ing foundations an	d certain	
1	Minimum investment return from Part X, line 6		1	235,130.
2a	Tax on investment income for 2009 from Part VI, line 5	2,198.		
b	Income tax for 2009. (This does not include the tax from Part VI.)			
C	Add lines 2a and 2b		2c	2,198 <u>.</u>
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	232,932.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	232,932.
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	232,932.
=	Part XII Qualifying Distributions (see instructions)		1	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		1a	220,803.
a	, , , , , , , , , , , , , , , , , , ,	ł	1b	220,003.
Þ			2	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	}	-	
3	Amounts set aside for specific charitable projects that satisfy the:		3a	
8			3b	
	Cash distribution test (attach the required schedule)		4	220,803.
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4			220,003.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment	ļ	5	0.
^	Income. Enter 1% of Part I, line 27b		6	220,803.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	or the foundation o		
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether 4940(e) reduction of tax in those years.	er me roundation q	judiiiies i0i	

Form **990-PF** (2009)

Form 990-PF (2009) ANNMARIE FOU	NDATION		23-73	301323 Page 9
Part XIII Undistributed Income (see	instructions)			
	(a) Corpus	(b) Years prior to 2008	(c) 2008	( <b>d</b> ) 2009
1 Distributable amount for 2009 from Part XI, line 7				232,932.
2 Undistributed income, if any, as of the end of 2009			-	
a Enter amount for 2008 only			0.	
b Total for prior years:		0.	ŀ	
3 Excess distributions carryover, if any, to 2009:				
a From 2004 208, 263.		•		
bFrom 2005 184,839.		1		
c From 2006 149,611.				
dFrom 2007 107, 292.				
e From 2008 67, 210.				
f Total of lines 3a through e	717,215.			
4 Qualifying distributions for 2009 from	<del></del>			· · · · · · · · · · · · · · · · · · ·
Part XII, line 4: ►\$ 220,803.				
a Applied to 2008, but not more than line 2a	İ		0.	
<b>b</b> Applied to undistributed income of prior				
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus				
(Election required - see instructions)	0.			
d Applied to 2009 distributable amount				220,803.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2009	12,129.			12,129.
(If an amount appears in column (d), the same amount must be shown in column (a) )				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	705,086.			
b Prior years' undistributed income. Subtract				
line 4b from line 2b		0.		
c Enter the amount of prior years'				

0.

0.

0.

undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed

**d** Subtract line 6c from line 6b. Taxable amount - see instructions

- e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount see instr.
- f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010
- 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)
- 8 Excess distributions carryover from 2004 not applied on line 5 or line 7
- 9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a

10 Analysis of line 9:	
a Excess from 2005	184,8
b Excess from 2006	149,6
c Excess from 2007	107,2
d Excess from 2008	67,2
e Excess from 2009	

196,134.

508,952.

0.

Form **990-PF** (2009)

0.

3 Grants and Contributions Paid During the Year 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 SEE STATEMENT 13	or substantial contributor	recipient		220,803.		
Total		···	► 3a	220,803.		
b Approved for future payment  NONE						
Total			<b>▶</b> 3b	0.		

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

Enter gross amounts unless otherwise indicated.		business income		y section 512, 513, or 514	(e)
1 Program service revenue:	(a) Business code	(b) Amount	(C) Exclu- sion code	(d) Amount	Related or exempt function income
a	ÇOUC		1000		
b	-				
c	- <del>                                    </del>		+		
d			<del></del>		· · · · · · · · · · · · · · · · · · ·
	- <del>  -</del>		<del>  - -</del>		
e					<del></del>
			<del></del>		
g Fees and contracts from government agencies	<del> </del>		+		
2 Membership dues and assessments					
3 Interest on savings and temporary cash			1 4 4	140	
investments			14	149.	<del></del>
4 Dividends and interest from securities	<u> </u>		14	106,291.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal					
property					
7 Other investment income					
8 Gain or (loss) from sales of assets other					
than inventory			18	21,176.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					11,342.
11 Other revenue:					
a	1 1				
b					
C	_				
d					
е	_	•	<del>-  </del>	· · · · · · · · · · · · · · · · · · ·	<del></del>
12 Subtotal. Add columns (b), (d), and (e)	-	0	· .	127,616.	11.342.
13 Total. Add line 12, columns (b), (d), and (e)	<u>L</u>			13	11,342. 138,958.
(See worksheet in line 13 instructions to verify calculations.	<b>\</b>			···	130,7300
Part XVI-B Relationship of Activities	s to the Acco	mplishment of I	Exempt Pu	urposes	
Line No. Explain below how each activity for which in	nome is reported in	column (a) of Part YVI	I-A contributed	importantly to the accomp	lichment of
the foundation's exempt purposes (other th				importantly to the accomp	monniont of
NOT APPLICABLE	an by providing tall				
HOT ATTBICABLE	<del></del>				· · · · · · · · · · · · · · · · · · ·
	· · · · · · · · · · · · · · · · · · ·				
			<del></del>		
<del></del>					
				<del></del>	<del></del>
					- <del> </del>

Form 990-F		RIE FOUNDATI			301323	Page 13
Part X			s To and Transactions ar	nd Relationships With Nonc	haritable	
	Exempt Organ					
1 Did th	ne organization directly or indi	rectly engage in any of the	following with any other organization	described in section 501(c) of	Y	es No
			ction 527, relating to political organiz	ations?		
	fers from the reporting found	ation to a noncharitable ex	empt organization of:			
(1) (					1a(1)	X
	Other assets				1a(2)	X
	transactions:					
	Sales of assets to a noncharita	· =			1b(1)	$\frac{\mathbf{x}}{\mathbf{x}}$
· ·	Purchases of assets from a no		ation		1b(2)	X
• •	Rental of facilities, equipment,				1b(3) 1b(4)	$\frac{X}{X}$
• •	Reimbursement arrangements .oans or loan guarantees				1b(5)	$\frac{x}{x}$
	Performance of services or me	imherchin or fundraicing c	olicitations		1b(6)	X
• •	ng of facilities, equipment, ma	•			10	X
		· ·	: :	lys show the fair market value of the goo	_لــــــــــــــــــــــــــــــــــــ	
	•			in any transaction or sharing arrangeme		٠,
	nn (d) the value of the goods,			,	,	
(a)Line no	(b) Amount involved	(c) Name of nonc	haritable exempt organization	(d) Description of transfers, transactions,	and sharing arran	gements
		ľ	1/A			
					<del></del>	
			<del>_</del>			
	<del></del>		<del></del>			
						<del></del>
	<del></del>		<del></del>			
	· · ·	<u> </u>	<del>.</del>	-		
2a Is the	foundation directly or indirec	tly affiliated with, or related	to, one or more tax-exempt organiza	tions described		
ın sec	tion 501(c) of the Code (othe	r than section 501(c)(3)) o	r ın section 527?		Yes	X No
b If "Ye	s,* complete the following sch	edule.				
	(a) Name of org	janization	(b) Type of organization	(c) Description of relati	onship	
	N/A					
	·					
Upd5/ c	enalities of persury. I declare that I t	nave examined this return. Inclu	ding accompanying schedules and statemen	nts, and to the best of my knowledge and belief,	it is true, correct.	
and cor	nplete Declaration of preparer (other	er than tatpayer or fiduciary) is	pased on all information of which preparer ha	as any knowledge)		

CMA

715-386-6138 Form **990-PF** (2009)

Preparer's identifying number

Date Check if self-employed ▶

EIN ▶

Phone no.

Signature of officer or trustee

GREGG S. KNAPF

906 DOMINION DRIVE HUDSON, WI 54016

Preparer's

signature

if self-employed),

address, and ZIP code

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

vame of the organization		Employer identification number		
A1	NNMARIE FOUNDATION	23-7301323		
Organization type (check o	one):			
Filers of:	Section:			
Form 990 or 990-EZ	501(c)( ) (enter number) organization			
	4947(a)(1) nonexempt chantable trust <b>not</b> treated as a private foundation			
	527 political organization			
Form 990-PF X 501(c)(3) exempt private foundation				
	4947(a)(1) nonexempt chantable trust treated as a private foundation			
	501(c)(3) taxable private foundation			
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 m lete Parts I and II.	oney or property) from any one		
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 (i) 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 contrutions of more than \$1,000 for use exclusively for religious, chantable, scientific, literary, cruelty to children or animals. Complete Parts I, II, and III.	- ·		
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 contribes exclusively for religious, charitable, etc., purposes, but these contributions did not agreed, enter here the total contributions that were received during the year for an exclusive omplete any of the parts unless the <b>General Rule</b> applies to this organization because ite, etc., contributions of \$5,000 or more during the year.	ggregate to more than \$1,000. Ely religious, charitable, etc.,		
out it must answer "No" on	hat is not covered by the General Rule and/or the Special Rules does not file Schedule in Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line ing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).	•		

_		
ne "	l of "	of Part

Name of organization

Employer identification number

### ANNMARIE FOUNDATION

23-7301323

Part I	Contributors (see instructions)		
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	P.O. BOX 22 PHILLIPS, WI 54555	s16,000.	Person X 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 Oncash Occash (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 Occash 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
923452 02-0		\$Schodula R (Form)	Person Payroll Noncash (Complete Part II if there is a noncash contribution) 990, 990-EZ, or 990-PF) (2009)

FORM 990-PF INTEREST ON SAVINGS AT	ND TEMPORARY CA	ASH INVESTMENTS	STATEMENT 1
SOURCE			AMOUNT
TEMPORARY INVESTMENT FUND			149.
TOTAL TO FORM 990-PF, PART I, LINE	3, COLUMN A		149.
FORM 990-PF DIVIDENDS AND	INTEREST FROM	SECURITIES	STATEMENT 2
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDENDS ON SECURITIES INTEREST ON CORPORATE BONDS	31,599. 74,692.	0.	31,599. 74,692.
TOTAL TO FM 990-PF, PART I, LN 4	106,291.	0.	106,291.

FORM 990-PF	INCOME AND COST OF GOODS SOLD INCLUDED ON PART I, LINE 10		STATEMENT	3
INCOME				
1. GROSS RECEIPTS 2. RETURNS AND ALLOWANG 3. LINE 1 LESS LINE 2				
	(LINE 15)			
6. OTHER INCOME		11,342		
7. GROSS INCOME (ADD L	INES 5 AND 6)		11,3	42
COST OF GOODS SOLD				
9. MERCHANDISE PURCHAS: 10. COST OF LABOR 11. MATERIALS AND SUPPL 12. OTHER COSTS				
14. INVENTORY AT END OF 15. COST OF GOODS SOLD	YEAR (LINE 13 LESS LINE 14)			<u> </u>

FORM 990-PF COST C	OF GOODS SOL	D - OTHER INCO	OME S	STATEMENT 4
DESCRIPTION				AMOUNT
FEDERAL TAX REFUND				11,342.
TOTAL OTHER INCOME				11,342.
FORM 990-PF	ACCOUNTI	NG FEES		STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX ACCOUNTING FEES	1,727.	1,727.	1,727	0.
TO FORM 990-PF, PG 1, LN 16B	1,727.	1,727.	1,727	0.
FORM 990-PF C	OTHER PROFES	SIONAL FEES	<u> </u>	STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES	15,902.	15,902.	15,902	. 0.
TO FORM 990-PF, PG 1, LN 16C	15,902.	15,902.	15,902	0.
FORM 990-PF	OTHER E	XPENSES		STATEMENT 7
DESCRIPTION		(B) NET INVEST- MENT INCOME		
STATE OF WISCONSIN FILING FEE TAX REPORTING FEE	10.		10	
TO FORM 990-PF, PG 1, LN 23	105.	105.	105	
·				<b>=</b>

DESCRIPTION  BOOK VALUE  VARIOUS CORPORATE STOCK  TOTAL TO FORM 990-PF, PART II, LINE 10B  3,434,536.  3,370,289.	FORM 990-PF U.S. AND STA	ATE/CITY GOVE	ERNMENT	OBLIGATIONS	STATEMENT	8
TOTAL U.S. GOVERNMENT OBLIGATIONS  TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS  TOTAL TO FORM 990-PF, PART II, LINE 10A  DESCRIPTION  TOTAL TO FORM 990-PF, PART II, LINE 10A  DESCRIPTION  TOTAL TO FORM 990-PF, PART II, LINE 10B  DESCRIPTION  TOTAL TO FORM 990-PF, PART II, LINE 10B  DESCRIPTION  TOTAL TO FORM 990-PF, PART II, LINE 10B  DESCRIPTION  DESCRIPTION  DESCRIPTION  DESCRIPTION  DESCRIPTION  DESCRIPTION  DESCRIPTION  BOOK VALUE  FAIR MARKET VALUE  FAIR MARKET VALUE  VARIOUS CORPORATE BONDS  TATEMENT 10  TOTAL TO FORM 990-PF  TOTAL T	DESCRIPTION			BOOK VALUE		r
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS  TOTAL TO FORM 990-PF, PART II, LINE 10A  EVALUATE STATEMENT  DESCRIPTION  VARIOUS CORPORATE STOCK  TOTAL TO FORM 990-PF, PART II, LINE 10B  DESCRIPTION  TOTAL TO FORM 990-PF, PART II, LINE 10B  DESCRIPTION  DESCRIPT	VARIOUS US TREASURY BONDS	<u> </u>		180,748.	184,0	01.
TOTAL TO FORM 990-PF, PART II, LINE 10A  180,748.  184,001.  FORM 990-PF  CORPORATE STOCK  BOOK VALUE  FAIR MARKET VALUE  VARIOUS CORPORATE STOCK  3,434,536. 3,370,289.  TOTAL TO FORM 990-PF, PART II, LINE 10B  3,434,536.  TOTAL TO FORM 990-PF  CORPORATE BONDS  STATEMENT 10  DESCRIPTION  BOOK VALUE  FAIR MARKET VALUE  VARIOUS CORPORATE BONDS  1,345,405. 1,389,684.	TOTAL U.S. GOVERNMENT OBLIGATION	ONS	-	180,748.	184,0	01.
FORM 990-PF CORPORATE STOCK STATEMENT STOCK  DESCRIPTION  VARIOUS CORPORATE STOCK  TOTAL TO FORM 990-PF, PART II, LINE 10B  DESCRIPTION  CORPORATE BONDS  STATEMENT 10  DESCRIPTION  BOOK VALUE  FAIR MARKET  VALUE  TOTAL TO FORM 990-PF  CORPORATE BONDS  TATEMENT 10  TAIR MARKET  VALUE  VARIOUS CORPORATE BONDS  1,345,405. 1,389,684.	TOTAL STATE AND MUNICIPAL GOVER	RNMENT OBLIGA	TIONS			
DESCRIPTION  BOOK VALUE  FAIR MARKET VALUE  VARIOUS CORPORATE STOCK  TOTAL TO FORM 990-PF, PART II, LINE 10B  TOTAL TO FORM 990-PF  CORPORATE BONDS  STATEMENT 10  DESCRIPTION  BOOK VALUE  FAIR MARKET VALUE  VALUE  TAIR MARKET VALUE  TAIR MARKET VALUE  TOTAL TO FORM 990-PF  CORPORATE BONDS  TOTAL TO FORM 990-PF  TOTAL TO FORM 990	TOTAL TO FORM 990-PF, PART II,	LINE 10A	=	180,748.	184,0	01.
DESCRIPTION  VARIOUS CORPORATE STOCK  TOTAL TO FORM 990-PF, PART II, LINE 10B  TOTAL TO FORM 990-PF  CORPORATE BONDS  TOTAL TO FORM 990-PF  TOTAL TO FORM 990-PF  TOTAL TO FORM 990-PF  TOTAL TO FORM 990-PF  CORPORATE BONDS  TATEMENT 10  FAIR MARKET VALUE  VARIOUS CORPORATE BONDS  1,345,405.  1,389,684.	FORM 990-PF	CORPORATE S	STOCK		STATEMENT	9
TOTAL TO FORM 990-PF, PART II, LINE 10B  3,434,536.  3,370,289.  FORM 990-PF  CORPORATE BONDS  STATEMENT 10  DESCRIPTION  BOOK VALUE  VALUE  VARIOUS CORPORATE BONDS  1,345,405.  1,389,684.	DESCRIPTION			BOOK VALUE		r
FORM 990-PF CORPORATE BONDS STATEMENT 10  DESCRIPTION BOOK VALUE FAIR MARKET VALUE  VARIOUS CORPORATE BONDS 1,345,405. 1,389,684.	VARIOUS CORPORATE STOCK		-	3,434,536.	3,370,2	39.
DESCRIPTION  BOOK VALUE  VARIOUS CORPORATE BONDS  1,345,405.  1,389,684.	TOTAL TO FORM 990-PF, PART II,	LINE 10B	=	3,434,536.	3,370,2	89.
DESCRIPTION BOOK VALUE VALUE  VARIOUS CORPORATE BONDS 1,345,405. 1,389,684.	FORM 990-PF	CORPORATE F	BONDS		STATEMENT	10
	DESCRIPTION			BOOK VALUE		Г
TOTAL TO FORM 990-PF, PART II, LINE 10C 1,345,405. 1,389,684.	VARIOUS CORPORATE BONDS		-	1,345,405.	1,389,6	34.
	TOTAL TO FORM 990-PF, PART II,	LINE 10C	-	1,345,405.	1,389,6	84.

	- LIST OF OFFICERS, DI		STAT	EMENT 11
NAME AND ADDRESS	TITLE AND AVRG HRS/WK		EMPLOYEE BEN PLAN CONTRIB	
DUANE DINGMANN	TREASURER			
N4660 1165TH STREET PRESCOTT, WI 54021	1.00	0.	0.	0.
SUE HANSON	MEMBER			_
N4660 1165TH STREET PRESCOTT, WI 54021	1.00	0.	0.	0.
CHARLIE KRUEGER	MEMBER			
N4660 1165TH STREET PRESCOTT, WI 54021	1.00	0.	0.	0.
BRAIN KULAS	PRESIDENT		_	
N4660 1165TH STREET PRESCOTT, WI 54021	1.00	0.	0.	0.
KAYE OMMEN	SECRETARY	0	0	0
N4660 1165TH STREET PRESCOTT, WI 54021	1.00	0.	0.	0.
VICKIE PETRASHEK	MEMBER	0.	0.	0.
N4660 1165TH STREET PRESCOTT, WI 54021	1.00	0.	0.	0.
TIM POPP	VICE PRESIDENT 1.00	0.	0.	0.
N4660 1165TH STREET PRESCOTT, WI 54021	1.00	0.	0.	0.
DONNIE MAGADANCE	MEMBER	0.	0.	0.
N4660 1165TH STREET PRESCOTT, WI 54021	1.00	0.	0.	0.
JEFF HEINZEN	MEMBER	0	0	0
N4660 1165TH STREET PRESCOTT, WI 54021	1.00	0.	0.	0.
STEVE RUSS	MEMBER	^	0	0
N4660 1165TH STREET PRESCOTT, WI 54021	1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF,	PAGE 6, PART VIII	0.	0.	0.
	=			

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION PART XV, LINES 2A THROUGH 2D

STATEMENT 12

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

LORI FEITEN - PHILLIPS PLASTICS - TECHNOLOGY CENTER N4660 1165TH STREET PRESCOTT, WI 540217644

TELEPHONE NUMBER

715-262-8000

FORM AND CONTENT OF APPLICATIONS

SEE STATEMENT 12

### ANY SUBMISSION DEADLINES

NONE

### RESTRICTIONS AND LIMITATIONS ON AWARDS

<sup>1)</sup> IF A STUDENT IS RECEIVING SCHOLARSHIPS FROM OTHER SOURCES, ONLY THOSE STUDENTS RECEIVING LESS THAN \$1,000 SHOULD BE CONSIDERED FOR THE ANNMARIE SCHOLARSHIP. 2) WHILE WE RECOGNIZE THAT GOOD GRADES ARE AN INTEGRAL PART OF SELECTING A SCHOLARSHIP WINNER, WE DO NOT WANT TO RESTRICT THE SELECTION PROCESS TO ONLY THE TOP TEN OR TWENTY STUDENTS. IF THERE IS A STUDENT WHO HAS A GOOD ACADEMIC RECORD BUT HAS NOT BEEN IN THE "TOP TEN", WE WISH HIM/HER TO BE CONSIDERED ALONG WITH THE "TOP TEN". 3) EXTRA-CURRICULAR AND COMMUNITY ACTIVITIES SHOULD BE CONSIDERED ALONG WITH ACADEMICS.



# **2010 SCHOLARSHIP**

Guidance Department:	Please return this form by May 17, 2010 to inform us of the scholarship recipient for the current year. Send form to:
	Lori Feiten AnnMarie Foundation N4660 1165 <sup>th</sup> Street Prescott, WI 54021 Or Fax: 715.262.8080 (Phone: 715.262.8034) Iori.feiten@phillipsplastics.com
	Award Certificates will be mailed to your school the first week of May 2010. The certificate will be blank. We ask that you fill in the recipients name prior to awarding the scholarship at your ceremony.
Name of High School:	
Scholarship Amount:	\$1,500
Scholarship Granted To: Student's Name	
Mailing Address	
City, State, Zip	
Phone Number	
Email	

Guidance Counselor Signature & Date

# Student's instructions on how to receive their AnnMarie Foundation Scholarship checks

Your scholarship will be paid in two installments:

The first installment in the amount of \$500 will be issued after successful completion of the first semester of your first year of full-time enrollment at college or technical school. (Generally this would be after your grades are posted the first part of January.)

The second installment in the amount of \$1,000 will be issued after successful completion of the first semester of the second year of full-time enrollment. (Again, generally the first part of January.)

To request your scholarship check, please send the following:

- 1) Documentation from your school or the internet stating that you have successfully completed the previous semester (transcripts work well)
- Documentation from your school or the internet that you are enrolled full-time for the following semester to continue your education (class schedule works well)
- 3) The address you would like your check mailed to

The check will be made out to you, not your school. You may sign it over to the school once you have received it if that is your preference. To receive your check, send the necessary documents (noted above) to:

Lori Feiten AnnMarie Foundation Phillips Plastics Corporation N4660 1165<sup>th</sup> Street P.O. Box 185 Prescott, WI 54021

715.262.8034 lori.feiten@phillipsplastics.com

There is about a 2 week turn-around time to process your request and get your check in the mail.

Congratulations on receiving the AnnMarie Foundation Scholarship! Keep up the good work!

# Scholarship Payments for FY2009

### **SCHOLARSHIP RECIPIENTS FOR 2008 - 2009**

NAME		HIGH SCHOOL	
(last)	(first)		-
Allsop	Ryan	EAU - Memorial HS	1000
Bartelt	Christopher	PHILLIPS H.S.	1000
Beilke	Patrick .	ELK MOUND	
Berndt	Tyler	MEDFORD	1000
Bohl	Katherine	CHIPPEWA FALLS McDonnell H	
Boos	Samantha	CHIPPEWA FALLS H.S.	1000
Croes	Brenda	NEW RICHMOND	
Deasy	Adrian	MENOMONIE	1000
Deitz	Destiny	PARK FALLS H.S.	
Doffing	Kalena	BALDWIN	
Etten	Joseph	MEDFORD	1000
Felling	Stephanie	OSCEOLA	1000
Folstad	Jennifer	EAU - Regis HS	1000
Jackson	Sarah	PHILLIPS H.S.	1000
Kent	Karisa	MONDOVI	1000
Knudtson	Ryan	ELEVA-STRUM	1000
Lacksonen	Erik	MENOMONIE	1000
Langer	Jacob	PRESCOTT H.S.	1000
Leemkuil	Greta	SOMERSET	1000
Lentz	Mari	PHILLIPS H.S.	1000
Lovett	Samantha	BOYCEVILLE	
Lutz	Sarah	NEW RICHMOND	1000
Marshall	William	PHILLIPS H.S.	1000
Martinson	Alyssa	NEW RICHMOND	1000
Mayr	Melissa	HUDSON	1000
Meyers	Morgan	RIVER FALLS	1000
Peterson	Jordan	MEDFORD	1000
Poppe	Amy Jo	EAU - Memorial HS	1000
Raleigh	Kyle	PRENTICE H.S.	1000
Schreiner	Cynthia	RIB LAKE H.S.	1000
Schweiner	Eric	EAU - North HS	1000
Scott	Jamie	PHILLIPS H.S.	1000
Semanko	Jacob	FALL CREEK	1000
Smith	Cassandra	AMERY	1000
Sokolowski	Sara	EAU - North HS	
Sterzinger	Stacey	COLBY	1000
Swanson	Marissa	MENOMONIE	1000
Torud	Brittany	ALTOONA	1000
Wollberg	Nichelle	COLFAX	1000
			33000

### **SCHOLARSHIP RECIPIENTS FOR 209 - 2010**

NAME		HIGH SCHOOL	
(last)	(first)		•
Amell	Kate	NEW RICHMOND	500
Archambo	Katherine	ABBOTSFORD	
Buss	Samantha	MENOMONIE	500
Coyle	Anne	PHILLIPS H.S.	500
Erickson	Christina Mari		500
Fedie	Joslyn	DURAND	500
Fraundorf	Ben	PHILLIPS H.S.	500
Genco	Emily	RIVER FALLS	500
Gordon	Cally	RIB LAKE H.S.	500
Gregorich	Brittany	ALTOONA	500
Gruenwald	Chelsea	CHIPPEWA FALLS McDonnell H	
Haas	Gina	COLBY	500
Holtz	Jesse	MEDFORD	500
Humphreys	Emily	EAU - Memorial HS	300
Kaliska	Emily	PHILLIPS H.S.	
Kaufman	Leah	PRESCOTT H.S.	500
Knudtson	Bethany	ELEVA-STRUM	500
Koller	Megan	OWENWITHEE	500
Lehmen	Erin	MENOMONIE	500
Lewiston	Katherine	MONDOVI	500
Loida	Victoria	BOYCEVILLE	500
	Sara	FALL CREEK	500
Magerowski Mayer	Christine		500 500
Meyer Morris		AMERY	
	Anna	ST. CROIX CENTRAL	500
Neri Norwick	Matthew	MEDFORD	500
	Cassie	PHILLIPS H.S.	500
Peirson	Karolyn	NEW RICHMOND	500
Peterson	Tim	PHILLIPS H.S.	500
Pierson	James	EAU - Memorial HS	500
Ramberg	Daniel	BALDWIN	500
Rebhan	Jake	NEW RICHMOND	500
Reiter	Katherine	CHIPPEWA FALLS H.S.	500
Rinehart	Heather	ELK MOUND	
Ring	Kellie	SOMERSET	500
Robertson	Joseph	EAU - Regis HS	500
Ross	Rachel	GLENWOOD CITY	500
Russell	Brittany	HUDSON	500
Sackmann	Connie	MEDFORD	500
Schneck	Kirstie	EAU - North HS	500
Schroeder	Amanda	COLFAX	500
Swanson	Elise	MENOMONIE	500
Tunison	Emily	PARK FALLS H.S.	500
Wilund	Hannah	PRENTICE H.S.	500
Withey	Jessica	PARK FALLS H.S.	500
Zais	Sarah	EAU - North HS	500
			19500

68,500

<b>ANN CERVENKA</b>	SCHOL	<b>ARSHIP</b>	RECIPIENTS
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**TOTAL SCHOLARSHIPS PAID:** 

Polacek	Colin	2000
Lind	Ethan	2000
Clinton	Richard "Jimmie"	2000
Flessert	Zachary	2000
		8000
MIKE LITVINOFI	F SCHOLARSHIP RECIPIENTS	
Flessert	David	2000
Hoogland	Axel	2000
Melby	Patrick	2000
Vyskocil	Jacob	2000-
		8000

### May 2009

Medford School District       \$2,341.00         Abbotsford School District       \$378.00         Holy Rosary Catholic School       \$335.00         Emmanuel Lutheran School       \$210.00         Sand Box Day Care       \$500.00         JR Achievement - Medford       \$350.00         Medford Area Youth Football       \$1,000.00         Medford Swm Klub       \$900.00
Holy Rosary Catholic School       \$335.00         Emmanuel Lutheran School       \$210.00         Sand Box Day Care       \$500.00         JR Achievement - Medford       \$350.00         Medford Area Youth Football       \$1,000.00         Medford Swm Klub       \$900.00
Emmanuel Lutheran School \$210.00 Sand Box Day Care \$500.00 JR Achievement - Medford \$350.00 Medford Area Youth Football \$1,000.00 Medford Swm Klub \$900.00
Sand Box Day Care \$500.00 JR Achievement - Medford \$350.00 Medford Area Youth Football \$1,000.00 Medford Swm Klub \$900.00
JR Achievement - Medford \$350.00  Medford Area Youth Football \$1,000.00  Medford Swm Klub \$900.00
Medford Area Youth Football \$1,000.00 Medford Swm Klub \$900.00
Medford Swim Klub \$900.00
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Gilman Graduation Party \$300.00
Menomonie School District \$3,600.00
Durand School District \$422.00
Square Meal \$750,00
Colfax Public Library \$390.00
Colfax Merry Mixer Club \$600.00
Dunn County Historical Society \$600.00
Elk Mound School District \$500.00
Eau Claire School District \$3,498.00
Bloomer School Disstrict (Playground) \$985.00
Ski Sprites Water Ski Team \$400.00
Chippewa Falls School Safety Patrol \$625.00
Memorial Graduation Party \$300.00
St. Paul's Catholic School \$1,100.00
Chippewa County Assn Home & Comm. Ed. \$500.00
Hope Gospel Mission \$800.00
UWEC WI Youth Sports Program \$1,000.00
Chippewa Valley Museum \$2,000.00
New Richmond School District-PLTW \$3,000.00
Hammond Community Library \$200.00
Lamar Community Center \$1,000.00
Roberts Congregational UCC Food Pantry \$1,000.00
Counseling & Development Center \$1,050.00
Big Brothers Big Sisters of the Northwoods \$1,000.00
Price County UW-Extension \$1,354.00
Hudson School District-PLTW \$3,000.00
Prescott School District \$1,300.00
St. Patrick School \$1,300.00
SOS Players (Skits Outreach Services) \$550.00
HOPE Adoption & Family Services \$600.00
Phillips School District \$3,600.00
Price Ice\$1,000.00
\$44,338.00

### August 2009

Medford School District	\$1,952.00
St. Anthony School - Athens	\$500.00
Abbotsford Christian Academy	\$200.00
Holy Rosary Catholic School	\$565.00
St. Mary Catholic School	\$210.00
Immanuel Lutheran School	\$300.00
Medford Performing Arts	\$750.00
Catholic Area Schools of Eau Claire	\$1,915.00
Tar Wars (C/O Marshfield Clinic)	\$800.00
Eau Claire Chamber Orchestra	\$553.00
Chippewa Valley Cultural Assoc/Heyde Center for the Arts	\$1,000.00
Eau Claire School District	\$1,798.00
Literacy Volunteers of America-Chippewa Valley	\$1,000.00
AIDS Resource Center	\$1,000.00
Indianhead Area Special Olympics	\$1,350.00
Chippewa Valley Symphony	\$600.00
Durand School District	\$875.00
UW Stout Summer Tech & Eng Program STEP (11 yr olds)	\$1,000.00
West Central WI Community Action Agency	\$1,000.00
Menomonie Day Care	\$1,525.00
Village of Wilson/Wilson Park Playground Committee	\$1,130.00
The Bridge	\$1,145.00
Elk Mound Fire Department	\$500.00
House Calls	\$1,200.00
New Richmond School District-PLTW	\$3,000.00
Carleton A. Friday Memorial Library	\$1,100.00
Salvation Army Serenity Home	\$1,200.00
Polk County Historical Society	\$800.00
St. Croix Valley Music Teachers Assoc	\$100.00
Friends of Fred Smith	\$1,050 00
Price County Fair Assn.	\$922 00
River Falls Public Library	\$110 00
Phillips School District	\$1,765.00
Peace Lutheran Day Care	\$1,200.00
	\$34,115.00

### November 2009

Eau Claire School District	\$4.023.00
Catholic Area Schools of Eau Claire	\$2,839.00
JR Achievement - NW District	\$500.00
New Beginnings .	\$313.00
JR Achievement - Stanley-Boyd	\$150.00
Feed My People	\$874.00
Menomonie School District	\$1,590.00
Durand School District	\$988.00
St. Joseph School - Menomonie	\$1,069.00
Dunn County Interfaith Volunteers	\$420.00
St. Croix Central School District	\$760 00
St. Mary's School	\$1,600.00
S.A.F.E.	\$1,000.00
COME School Supply Drive	\$1,200.00
Interfaith Caregivers of Polk County	\$1,200.00
Clear Lake After Prom	\$300.00
Medford School District	\$2,847.00
Holy Rosary Catholic School	\$830.00
Immanuel Lutheran School	\$540.00
Stetsonville Fire Department	\$540.00 \$500.00
Medford Senior Breakfast	\$300.00
Christmas Wish	\$300.00
Hudson School District	\$900.00
Renaissance Academy	\$1,236.00
JR Achievement - Hudson	\$450.00
Big Brothers Big Sisters of St. Croix and Chippewa Valley	\$1,500.00
Hudson High School All Night Party -	\$300.00
Prescott Senior Lock-in	\$300.00
Operation HELP	\$1,000.00
Phillips School District	\$2,823.00
St. Anthony Padua School	\$1,000.00
Phillips Community Day Care Center	\$500.00
Prentice School District	\$2,876.00
Woods and Waters Fine Arts Council	\$500.00
TYOOGS AND TRACES THE ALS COUNCIL	\$36,678.00
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### February 2010

Eau Claire School District	\$2.062.00
Catholic Area Schools of Eau Claire	\$2,062.00 \$2,516.00
JR Achievement - Augusta	\$2,510.00 \$250.00
Bolton Refuge House	\$1,000.00
People Against Chemical Abuse	
Memorial Graduation Party	\$400.00
	\$200.00
Immanuel Lutheran High School Parents	\$150.00
Fall Creek School District	\$271.00
Eau Claire Children's Theater	\$814.00
Trinity Equestrian Center	\$500.00
Durand School District	\$2,100.00
St. Joseph School - Menomonie	\$700.00
UW Stout STEPS Advanced	\$1,000.00
JR Achievement - Durand	\$250.00
Dunn County Fair Board	\$350.00
Somerset School District	\$900.00
Baldwin Christian School	\$1,200.00
UW-Extension	\$300.00
Moms and Dads Against Meth	\$1,000.00
Amery Area Senior Citizens, Inc	\$500.00
Woodville Senior Center-Dept on Aging	\$500.00
St. Croix Central School District	\$500.00
Somerset High School Post Prom Committee	\$300.00
Prentice Fire Department	\$500.00
Prentice Ambulance Service	\$450.00
Society of St. Vincent De Paul	\$700.00
Medford School District	\$1,877.00
Rib Lake School District	\$1,115.00
Abbotsford Christian Academy	\$500.00
Holy Rosary Catholic School	\$330.00
Little Lamb Academy of Medford Day Care	\$388.00
Colby Public Library	\$500.00
Black River Industries, Inc	\$2,500.00
Medford Prom Party	\$300.00
Hudson School District	\$500 00
Friends of Freedom Park	\$1,500.00
River Falls Community Arts Base	\$750.00
FamilyMeans	\$500.00
Youth Action Hudson (formerly Community Action)	\$1,670:00
Phillips School District	\$2,279.00
Chequamegon School District	\$1,250.00
St. Anthony Padua School	\$800.00
Park Falls Area Community Development	\$1,000 00
	\$37,172.00

Total	Grant	<b>Awarda</b>	for F	Vna

\$152,303

\$68,500 was paid in FY09 toward scholarships. Total Grants and Scholarship dispersement:

\$220,803

<sup>\*\*</sup> None of the recipients are related to the Foundation.

The purpose of all grants was for either education or general operations.