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# Return of Private Foundation

## or Section 4947(a)(1) Nonexempt Charitable Trust

### Treated as a Private Foundation

**2009**Department of the Treasury  
Internal Revenue Service

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

For calendar year 2009, or tax year beginning **MAY 1, 2009**, and ending **APR 30, 2010**G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return  
☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation <b>ANNMARIE FOUNDATION</b>		A Employer identification number <b>23-7301323</b>
	Number and street (or P.O. box number if mail is not delivered to street address) Room/suite <b>N4660 1165TH STREET</b>		B Telephone number <b>715-262-8000</b>
	City or town, state, and ZIP code <b>PRESCOTT, WI 54021</b>		C If exemption application is pending, check here <input type="checkbox"/>
	H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ <b>5,149,979.</b>		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		17,500.			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		149.	149.	149.	STATEMENT 1
4 Dividends and interest from securities		106,291.	106,291.	106,291.	STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		21,176.			
b Gross sales price for all assets on line 6a		2,546,407.			
7 Capital gain net income (from Part IV, line 2)			21,176.		
8 Net short-term capital gain				N/A	
9 Income modifications					
10a Gross sales less returns and allowances		11,342.			STATEMENT 3
b Gross profit or (loss)		11,342.		11,342.	STATEMENT 4
11 Other income		156,458.	127,616.	117,782.	
12 Total (Add lines 4 through 11)					
13 Compensation of officers, directors, trustees, etc.		0.	0.	0.	0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 5		1,727.	1,727.	1,727.	0.
c Other professional fees STMT 6		15,902.	15,902.	15,902.	0.
17 Interest					
18 Taxes					
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 7		105.	105.	105.	0.
24 Total operating and administrative expenses. Add lines 13 through 23		17,734.	17,734.	17,734.	0.
25 Contributions, gifts, grants paid		220,803.			220,803.
26 Total expenses and disbursements. Add lines 24 and 25		238,537.	17,734.	17,734.	220,803.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-82,079.			
b Net investment income (if negative, enter -0-)			109,882.		
c Adjusted net income (if negative, enter -0-)				100,048.	

<b>Part II Balance Sheets</b> <small>Attached schedules and amounts in the description column should be for end-of-year amounts only</small>		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing	110,509.	206,005.	206,005.
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶ Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations <b>STMT 8</b>	832,213.	180,748.	184,001.
	b Investments - corporate stock <b>STMT 9</b>	3,632,103.	3,434,536.	3,370,289.
	c Investments - corporate bonds <b>STMT 10</b>	673,948.	1,345,405.	1,389,684.
	11 Investments - land, buildings, and equipment basis ▶ Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
14 Land, buildings, and equipment basis ▶ Less: accumulated depreciation ▶				
15 Other assets (describe ▶ )				
<b>16 Total assets (to be completed by all filers)</b>	<b>5,248,773.</b>	<b>5,166,694.</b>	<b>5,149,979.</b>	
<b>Liabilities</b>	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ )			
<b>23 Total liabilities (add lines 17 through 22)</b>	<b>0.</b>	<b>0.</b>		
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	1,103,122.	1,103,122.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	4,145,651.	4,063,572.	
<b>30 Total net assets or fund balances</b>	<b>5,248,773.</b>	<b>5,166,694.</b>		
<b>31 Total liabilities and net assets/fund balances</b>	<b>5,248,773.</b>	<b>5,166,694.</b>		

**Part III Analysis of Changes in Net Assets or Fund Balances**

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1 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 Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)			(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a CORPORATE STOCKS</b>			<b>P</b>	<b>VARIOUS</b>	<b>VARIOUS</b>
b					
c					
d					
e					

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 2,546,407.		2,525,231.	21,176.
b			
c			
d			
e			

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			21,176.
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	21,176.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	21,176.

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	297,647.	4,637,900.	.064177
2007	335,042.	4,839,382.	.069232
2006	373,047.	4,588,326.	.081304
2005	395,841.	4,339,561.	.091217
2004	408,270.	4,090,217.	.099816

2 Total of line 1, column (d)	2	.405746
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.081149
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	4,702,597.
5 Multiply line 4 by line 3	5	381,611.
6 Enter 1% of net investment income (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.	8	220,803.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	2,198.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		3	2,198.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	2,198.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		6a	1,600.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		6b	
6 Credits/Payments:		6c	
a 2009 estimated tax payments and 2008 overpayment credited to 2009		6d	
b Exempt foreign organizations - tax withheld at source		7	1,600.
c Tax paid with application for extension of time to file (Form 8868)		8	
d Backup withholding erroneously withheld		9	598.
7 Total credits and payments. Add lines 6a through 6d		10	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached		11	
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 <input type="checkbox"/> Refunded <input type="checkbox"/>			

**Part VII-A Statements Regarding Activities**

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

N/A

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► M&I TRUST INVESTMENT MGMT Located at ► 301 WATER STREET, EAU CLAIRE, WI	Telephone no. ► 715-831-4227 ZIP+4 ► 54703		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	► 15 N/A		

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

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

	Yes	No
<b>1a</b> During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
<b>b</b> If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
<b>c</b> 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?		1c X
<b>2</b> 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)):		
<b>a</b> At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
<b>b</b> Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	2b
<b>c</b> If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
<b>3a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
<b>b</b> If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)	N/A	3b
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
<b>b</b> Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?		4b X

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

6b

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

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

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 11		0.	0.	0.

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

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

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

0





**Part X** Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, 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.
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.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	4,774,210.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	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.

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

1	Minimum investment return from Part X, line 6	1	235,130.
2a	Tax on investment income for 2009 from Part VI, line 5	2a	2,198.
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,198.
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	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	220,803.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	220,803.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	220,803.

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

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

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
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.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004	208,263.			
b From 2005	184,839.			
c From 2006	149,611.			
d From 2007	107,292.			
e From 2008	67,210.			
f Total of lines 3a through e	717,215.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► \$ 220,803.				
a Applied to 2008, but not more than line 2a			0.	
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 (If an amount appears in column (d), the same amount must be shown in column (a).)	12,129.			12,129.
6 Enter the net total of each column as indicated below:	705,086.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	196,134.			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	508,952.			
10 Analysis of line 9:				
a Excess from 2005	184,839.			
b Excess from 2006	149,611.			
c Excess from 2007	107,292.			
d Excess from 2008	67,210.			
e Excess from 2009				









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

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

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

OMB No 1545-0047

**2009**

Name of the organization

Employer identification number

**ANNMARIE FOUNDATION**

**23-7301323**

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐

501(c)( ) (enter number) organization

☐

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐

527 political organization

Form 990-PF

☒

501(c)(3) exempt private foundation

☐

4947(a)(1) nonexempt charitable trust treated as a private foundation

☐

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

☒

For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

**Special Rules**

☐

For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐

For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ \_\_\_\_\_

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

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

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

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	ROBERT & DEBBIE CERVENKA P.O. BOX 22 PHILLIPS, WI 54555	\$ 16,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)



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

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SOURCE	AMOUNT
TEMPORARY INVESTMENT FUND	149.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	149.

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FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDENDS ON SECURITIES	31,599.	0.	31,599.
INTEREST ON CORPORATE BONDS	74,692.	0.	74,692.
TOTAL TO FM 990-PF, PART I, LN 4	106,291.	0.	106,291.

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FORM 990-PF

INCOME AND COST OF GOODS SOLD  
INCLUDED ON PART I, LINE 10

STATEMENT 3

## INCOME

1. GROSS RECEIPTS . . . . .		
2. RETURNS AND ALLOWANCES . . . . .		
3. LINE 1 LESS LINE 2 . . . . .		
4. COST OF GOODS SOLD (LINE 15) . . . . .		
5. GROSS PROFIT (LINE 3 LESS LINE 4). . . . .		
6. OTHER INCOME . . . . .	11,342	
7. GROSS INCOME (ADD LINES 5 AND 6) . . . . .		11,342

## COST OF GOODS SOLD

8. INVENTORY AT BEGINNING OF YEAR . . . . .		
9. MERCHANDISE PURCHASED. . . . .		
10. COST OF LABOR. . . . .		
11. MATERIALS AND SUPPLIES . . . . .		
12. OTHER COSTS. . . . .		
13. ADD LINES 8 THROUGH 12 . . . . .		
14. INVENTORY AT END OF YEAR . . . . .		
15. COST OF GOODS SOLD (LINE 13 LESS LINE 14). .		

FORM 990-PF	COST OF GOODS SOLD - OTHER INCOME	STATEMENT	4
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DESCRIPTION	AMOUNT
FEDERAL TAX REFUND	11,342.
TOTAL OTHER INCOME	11,342.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
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	OTHER PROFESSIONAL FEES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
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 EXPENSES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
STATE OF WISCONSIN FILING FEE	10.	10.	10.	0.
TAX REPORTING FEE	95.	95.	95.	0.
TO FORM 990-PF, PG 1, LN 23	105.	105.	105.	0.

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FORM 990-PF	U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS	STATEMENT	8
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DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
VARIOUS US TREASURY BONDS	X		180,748.	184,001.
TOTAL U.S. GOVERNMENT OBLIGATIONS			180,748.	184,001.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			180,748.	184,001.

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FORM 990-PF	CORPORATE STOCK	STATEMENT	9
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DESCRIPTION	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.	3,370,289.

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FORM 990-PF	CORPORATE BONDS	STATEMENT	10
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
VARIOUS CORPORATE BONDS	1,345,405.	1,389,684.
TOTAL TO FORM 990-PF, PART II, LINE 10C	1,345,405.	1,389,684.

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FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS  
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 11

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
DUANE DINGMANN N4660 1165TH STREET PRESCOTT, WI 54021	TREASURER 1.00	0.	0.	0.
SUE HANSON N4660 1165TH STREET PRESCOTT, WI 54021	MEMBER 1.00	0.	0.	0.
CHARLIE KRUEGER N4660 1165TH STREET PRESCOTT, WI 54021	MEMBER 1.00	0.	0.	0.
BRAIN KULAS N4660 1165TH STREET PRESCOTT, WI 54021	PRESIDENT 1.00	0.	0.	0.
KAYE OMMEN N4660 1165TH STREET PRESCOTT, WI 54021	SECRETARY 1.00	0.	0.	0.
VICKIE PETRASHEK N4660 1165TH STREET PRESCOTT, WI 54021	MEMBER 1.00	0.	0.	0.
TIM POPP N4660 1165TH STREET PRESCOTT, WI 54021	VICE PRESIDENT 1.00	0.	0.	0.
DONNIE MAGADANCE N4660 1165TH STREET PRESCOTT, WI 54021	MEMBER 1.00	0.	0.	0.
JEFF HEINZEN N4660 1165TH STREET PRESCOTT, WI 54021	MEMBER 1.00	0.	0.	0.
STEVE RUSS N4660 1165TH STREET PRESCOTT, WI 54021	MEMBER 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

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NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

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

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TELEPHONE NUMBER

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715-262-8000

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FORM AND CONTENT OF APPLICATIONS

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SEE STATEMENT 12

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ANY SUBMISSION DEADLINES

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NONE

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RESTRICTIONS AND LIMITATIONS ON AWARDS

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1) 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.

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## 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)  
lori.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:**

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**Scholarship Amount:**

**\$1,500**

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**Scholarship Granted To:  
Student's Name**

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**Mailing Address**

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**City, State, Zip**

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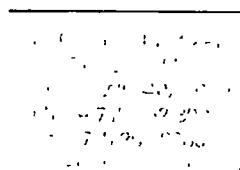
**Phone Number**

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**Email**

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\_\_\_\_\_  
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)
- 2) 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](mailto: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 HS	1000 (Pd in 2 \$500 checks)
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
			<u>33000</u>

## 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	OSCEOLA 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 HS
Haas	Gina	COLBY 500
Holtz	Jesse	MEDFORD 500
Humphreys	Emily	EAU - Memorial HS
Kaliska	Emily	PHILLIPS H.S.
Kaufman	Leah	PRESCOTT H.S. 500
Knudtson	Bethany	ELEVA-STRUM 500
Koller	Megan	OWEN/WITHEE 500
Lehmen	Erin	MENOMONIE 500
Lewiston	Katherine	MONDOVI 500
Loida	Victoria	BOYCEVILLE 500
Magerowski	Sara	FALL CREEK 500
Meyer	Christine	AMERY 500
Morris	Anna	ST. CROIX CENTRAL 500
Neri	Matthew	MEDFORD
Norwick	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
		<hr/> 19500 <hr/>

**ANN CERVENKA SCHOLARSHIP RECIPIENTS**

Polacek	Colin	2000
Lind	Ethan	2000
Clinton	Richard "Jimmie"	2000
Flessert	Zachary	2000
		<u>8000</u>

**MIKE LITVINOFF SCHOLARSHIP RECIPIENTS**

Flessert	David	2000
Hoogland	Axel	2000
Melby	Patrick	2000
Vyskocil	Jacob	2000
		<u>8000</u>

**TOTAL SCHOLARSHIPS PAID:**68,500

## Total AnnMarie Grant Awards for FY2009

**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 Swim Klub	\$900.00
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 District (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
	<u>\$44,338.00</u>

## Total AnnMarie Grant Awards for FY2009

**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
	<u>\$34,115.00</u>

## Total AnnMarie Grant Awards for FY2009

**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.	\$500.00
COME School Supply Drive	\$1,200.00
Interfaith Caregivers of Polk County	\$850.00
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	\$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
	<u>\$36,678.00</u>

## Total AnnMarie Grant Awards for FY2009

**February 2010**

Eau Claire School District	\$2,062.00
Catholic Area Schools of Eau Claire	\$2,516.00
JR Achievement - Augusta	\$250.00
Bolton Refuge House	\$1,000.00
People Against Chemical Abuse	\$400.00
Memorial Graduation Party	\$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
	<u>\$37,172.00</u>

**Total Grant Awards for FY09****\$152,303**

\$68,500 was paid in FY09 toward scholarships.

**Total Grants and Scholarship disbursement:****\$220,803****\*\* None of the recipients are related to the Foundation.****The purpose of all grants was for either education or general operations.**