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

OMB No 1545-0052

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>Scholarship Fund Flint Plumbing &amp; Pipefitting Industry</b>		A Employer identification number <b>38-6522581</b>
	Number and street (or P O box number if mail is not delivered to street address) Room/suite <b>6525 Centurion Drive</b>		B Telephone number (see the instructions) <b>(810) 720-5243</b>
	City or town State ZIP code <b>Lansing MI 48917</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, column (c), line 16) \$ <b>10,957.</b>		J Accounting method: <input type="checkbox"/> Cash <input checked="" 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) (see the instructions).)

	(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 (att sch)	15,473.			
2 Ck <input type="checkbox"/> if the foundn is not req to att Sch B				
3 Interest on savings and temporary cash investments	5.	5.		
4 Dividends and interest from securities				
5a Gross rents				
b Net rental income or (loss)				
6a Net gain/(loss) from sale of assets not on line 10				
b Gross sales price for all assets on line 6a				
7 Capital gain net income (from Part IV, line 2)				
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit/(loss) (att sch)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	15,478.	5.		
13 Compensation of officers, directors, trustees, etc				
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach sch) L-16b Stmt	875.			875.
c Other prof fees (attach sch) L-16c Stmt	300.			300.
17 Interest				
18 Taxes (attach schedule)(see instr)				
19 Depreciation (attach sch) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule) See Line 23 Stmt	83.	80.		3.
24 Total operating and administrative expenses. Add lines 13 through 23	1,258.	80.		1,178.
25 Contributions, gifts, grants paid	17,000.			17,000.
26 Total expenses and disbursements. Add lines 24 and 25	18,258.	80.		18,178.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-2,780.			
b Net Investment Income (if negative, enter -0-)		0.		
c Adjusted net income (if negative, enter -0-)				

**Part II** Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>ASSETS</b>	1 Cash — non-interest-bearing . . . . .	12,479.	9,689.	9,689.
	2 Savings and temporary cash investments . . . . .			
	3 Accounts receivable . . . . . <span style="float:right">1,268.</span>			
	Less: allowance for doubtful accounts <span style="float:right">1,258.</span>	1,258.	1,268.	1,268.
	4 Pledges receivable . . . . .			
	Less: allowance for doubtful accounts <span style="float:right">1,268.</span>			
	5 Grants receivable . . . . .			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see the instructions) . . . . .			
	7 Other notes and loans receivable (attach sch) <span style="float:right">1,268.</span>			
	Less: allowance for doubtful accounts <span style="float:right">1,268.</span>			
	8 Inventories for sale or use . . . . .			
	9 Prepaid expenses and deferred charges . . . . .			
	10a Investments — U.S. and state government obligations (attach schedule) . . . . .			
	b Investments — corporate stock (attach schedule) . . . . .			
	c Investments — corporate bonds (attach schedule) . . . . .			
	11 Investments — land, buildings, and equipment: basis <span style="float:right">1,268.</span>			
Less: accumulated depreciation (attach schedule) <span style="float:right">1,268.</span>				
12 Investments — mortgage loans . . . . .				
13 Investments — other (attach schedule) . . . . .				
14 Land, buildings, and equipment: basis <span style="float:right">1,268.</span>				
Less: accumulated depreciation (attach schedule) <span style="float:right">1,268.</span>				
15 Other assets (describe <span style="float:right">1,268.</span> )				
16 <b>Total assets</b> (to be completed by all filers — see instructions Also, see page 1, item I) . . . . .	13,737.	10,957.	10,957.	
<b>LIABILITIES</b>	17 Accounts payable and accrued expenses . . . . .	0.	0.	
	18 Grants payable . . . . .			
	19 Deferred revenue . . . . .			
	20 Loans from officers, directors, trustees, & other disqualified persons . . . . .			
	21 Mortgages and other notes payable (attach schedule) . . . . .			
	22 Other liabilities (describe <span style="float:right">1,268.</span> )			
	23 <b>Total liabilities</b> (add lines 17 through 22) . . . . .	0.	0.	
<b>NET ASSETS OR FUND BALANCES</b>	<b>Foundations that follow SFAS 117, check here</b> <span style="float:right">1,268.</span> <input type="checkbox"/>			
	24 Unrestricted . . . . .			
	25 Temporarily restricted . . . . .			
	26 Permanently restricted . . . . .			
	<b>Foundations that do not follow SFAS 117, check here</b> <span style="float:right">1,268.</span> <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds . . . . .			
	28 Paid-in or capital surplus, or land, building, and equipment fund . . . . .			
	29 Retained earnings, accumulated income, endowment, or other funds . . . . .	13,737.	10,957.	
	30 <b>Total net assets or fund balances</b> (see the instructions) . . . . .	13,737.	10,957.	
	31 <b>Total liabilities and net assets/fund balances</b> (see the instructions) . . . . .	13,737.	10,957.	

**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	13,737.
2 Enter amount from Part I, line 27a . . . . .	2	-2,780.
3 Other increases not included in line 2 (itemize) . . . . .	3	
4 Add lines 1, 2, and 3 . . . . .	4	10,957.
5 Decreases not included in line 2 (itemize) . . . . .	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30 . . . . .	6	10,957.

**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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1 a				
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			
b			
c			
d			
e			

  

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

(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
a			
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 ]

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):  
If gain, also enter in Part I, line 8, column (c) (see the instructions). If (loss), enter -0- in Part I, line 8.

**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 the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2008	20,178.	13,594.	1.484331
2007	25,477.	16,128.	1.579675
2006	25,695.	16,635.	1.544635
2005	25,103.	16,589.	1.513232
2004	23,246.	19,915.	1.167261

  

2 Total of line 1, column (d) 2 7.289134

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 1.457827

4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5 4 10,918.

5 Multiply line 4 by line 3 5 15,917.

6 Enter 1% of net investment income (1% of Part I, line 27b) 6 0.

7 Add lines 5 and 6 7 15,917.

8 Enter qualifying distributions from Part XII, line 4 8 18,178.

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.

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

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

**Part VII-A Statements Regarding Activities**

	Yes	No
1 a 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?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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.		
c Did the foundation file Form 1120-POL for this year?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ _____ (2) On foundation managers \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
b If 'Yes,' has it filed a tax return on Form 990-T for this year?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) MI - Michigan		
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	<input checked="" type="checkbox"/>	<input type="checkbox"/>
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	<input type="checkbox"/>	<input checked="" type="checkbox"/>
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses.	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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**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 . . . . . <u>N/A</u>	13	X	
14	The books are in care of <u>TIC International Corp.</u> Telephone no <u>(517) 321-7502</u> Located at <u>6255 Centurion Drive</u> <u>Lansing</u> <u>MI</u> ZIP + 4 <u>48917</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>			

**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 the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1 b	
<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? . . . . .	1 c	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? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u> .		
<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 the instructions.) . . . . .	2 b	X
<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. <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u> .		
<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.) . . . . .	3 b	
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . .	4 a	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? . . . . .	4 b	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)? (see instructions) ☐ 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)?

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?

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

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

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?

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
John D. Walter 1917 Howard Ave. Flint, MI 48503	Trustee 1.00	0.	0.	0.
Dominic Goyette 3842 Gorey Flint, MI 48506	Trustee 1.00	0.	0.	0.
Dave Worthing Jr. 3065 E. Farrand Rd. Clio, MI 48420	Trustee 1.00	0.	0.	0.
Mike Tomaszewski 228 Hyatt Lane Linden, MI 48451	Trustee 1.00	0.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
0				
0				
0				
0				

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

None





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

<b>1</b> Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b> Average monthly fair market value of securities	<b>1a</b>	11,084.
<b>b</b> Average of monthly cash balances	<b>1b</b>	
<b>c</b> Fair market value of all other assets (see instructions)	<b>1c</b>	
<b>d</b> Total (add lines 1a, b, and c)	<b>1d</b>	11,084.
<b>e</b> Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b> Acquisition indebtedness applicable to line 1 assets	<b>2</b>	
<b>3</b> Subtract line 2 from line 1d	<b>3</b>	11,084.
<b>4</b> Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	166.
<b>5</b> Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	10,918.
<b>6</b> Minimum investment return. Enter 5% of line 5	<b>6</b>	546.

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

<b>1</b> Minimum investment return from Part X, line 6	<b>1</b>	546.
<b>2a</b> Tax on investment income for 2009 from Part VI, line 5	<b>2a</b>	0.
<b>b</b> Income tax for 2009. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b> Add lines 2a and 2b	<b>2c</b>	0.
<b>3</b> Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	546.
<b>4</b> Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b> Add lines 3 and 4	<b>5</b>	546.
<b>6</b> Deduction from distributable amount (see instructions)	<b>6</b>	
<b>7</b> Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	546.

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

<b>1</b> Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b> Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	<b>1a</b>	18,178.
<b>b</b> Program-related investments — total from Part IX-B	<b>1b</b>	
<b>2</b> Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b> Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b> Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b> Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b> Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	18,178.
<b>5</b> Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	<b>5</b>	0.
<b>6</b> Adjusted qualifying distributions. Subtract line 5 from line 4	<b>6</b>	18,178.

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

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

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
<b>1</b> Distributable amount for 2009 from Part XI, line 7				546.
<b>2</b> Undistributed income, if any, as of the end of 2009:				
<b>a</b> Enter amount for 2008 only			680.	
<b>b</b> Total for prior years: 20__, 20__, 20__				
<b>3</b> Excess distributions carryover, if any, to 2009:				
<b>a</b> From 2004	22,250.			
<b>b</b> From 2005	24,276.			
<b>c</b> From 2006	24,867.			
<b>d</b> From 2007	25,477.			
<b>e</b> From 2008	20,178.			
<b>f</b> Total of lines 3a through e	117,048.			
<b>4</b> Qualifying distributions for 2009 from Part XII, line 4: ► \$ 18,178.				
<b>a</b> Applied to 2008, but not more than line 2a				
<b>b</b> Applied to undistributed income of prior years (Election required – see instructions)				
<b>c</b> Treated as distributions out of corpus (Election required – see instructions)				
<b>d</b> Applied to 2009 distributable amount				
<b>e</b> Remaining amount distributed out of corpus	18,178.			
<b>5</b> Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)				
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	135,226.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
<b>d</b> Subtract line 6c from line 6b. Taxable amount – see instructions		0.		
<b>e</b> Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount – see instructions			680.	
<b>f</b> Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				546.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
<b>8</b> Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	22,250.			
<b>9</b> Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	112,976.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2005	24,276.			
<b>b</b> Excess from 2006	24,867.			
<b>c</b> Excess from 2007	25,477.			
<b>d</b> Excess from 2008	20,178.			
<b>e</b> Excess from 2009	18,178.			

**Part XIV Private Operating Foundations** (see instructions and Part VI-A, question 9)

N/A

<b>1 a</b> If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling . . . . .					
<b>b</b> Check box to indicate whether the foundation is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)					
<b>2 a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .	Tax year	Prior 3 years			<b>(e) Total</b>
	<b>(a) 2009</b>	<b>(b) 2008</b>	<b>(c) 2007</b>	<b>(d) 2006</b>	
<b>b</b> 85% of line 2a . . . . .					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:					
<b>a</b> 'Assets' alternative test — enter:					
<b>(1)</b> Value of all assets . . . . .					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .					
<b>b</b> 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed . . . . .					
<b>c</b> 'Support' alternative test — enter:					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) . . . . .					
<b>(3)</b> Largest amount of support from an exempt organization . . . . .					
<b>(4)</b> Gross investment income . . . . .					

**Part XV Supplementary Information** (Complete this part only if the organization had \$5,000 or more in assets at any time during the year — see instructions.)**1 Information Regarding Foundation Managers:**

**a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)  
NONE

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest  
NONE

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs:**

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc, (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

**a** The name, address, and telephone number of the person to whom applications should be addressed:

Flint Plumbing & Pipefitting Industry Scholarship Fund

Mike Tomaszewski

G-5500 W. Pierson Rd. Flushing MI 48433 (810) 720-5243

**b** The form in which applications should be submitted and information and materials they should include:

See Copy Attached

**c** Any submission deadlines:

March 1 of each year

**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

See Copy Attached

**Part XV** Supplementary Information (continued)**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 recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
Hannah Badgley 7901 Fosteria Mayville MI 48744	None	N/A	Education	1,000.
Joshua Belill 11112 Willard Road Montrose MI 48457	None	N/A	Education	1,000.
William Boa 1499 Wiggins Road Fenton MI 48430	None	N/A	Education	1,000.
Samantha Barber 302 W. Mineral Clare MI 48617	None	N/A	Education	1,000.
Angelina Chavez 3315 Southgate Flint MI 48507	None	N/A	Education	1,000.
Cassandra Chavez 6750 E. M-71 Durand MI 48429	None	N/A	Education	1,000.
Tressa Garty 231 Juniper Davison MI 48423	None	N/A	Education	1,000.
Kelsey Gasper 11151 Riley Road Flushing MI 48433	None	N/A	Education	1,000.
Ramiro Lambaria III 10295 48th. #JJ101 Allendale MI 49401	None	N/A	Education	1,000.
See Line 3a statement				8,000.
<b>Total</b>			<b>3a</b>	<b>17,000.</b>

**b Approved for future payment**

<b>Total</b>			<b>3b</b>	

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

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1	Program service revenue:					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies . .					
2	Membership dues and assessments . . . . .					
3	Interest on savings and temporary cash investments . . .			14	5.	
4	Dividends and interest from securities . . . . .					
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 . . . . .					
9	Net income or (loss) from special events . . . . .					
10	Gross profit or (loss) from sales of inventory . . . . .					
11	Other revenue:					
a						
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e) . . . . .				5.	
13	Total. Add line 12, columns (b), (d), and (e) . . . . .				13	5.

(See worksheet in the instructions for line 13 to verify calculations.)

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

[illegible]



**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

Scholarship Fund Flint Plumbing & Pipefitting Industry

Employer identification number

38-6522581

Organization type (check one):

Filers of:

Form 990 or 990-EZ

Section:

- ☐ 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)/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 their 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).

**BAA 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

Scholarship Fund Flint Plumbing &amp; Pipefitting Industry

38-6522581

**Part I** Contributors (see instructions.)

(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Flint Plumbers and Pipefitters 6525 Centurion Drive Lansing MI 48917	\$ 15,473.	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)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)



Form 990-PF, Page 1, Part I, Line 23

**Line 23 Stmt**

Other expenses:	Rev/Exp Book	Net Inv Inc	Adj Net Inc	Charity Disb
Bank service charges	3.			3.
Investment fees	80.	80.		
Total	83.	80.		3.

Form 990-PF, Page 11, Part XV, line 3a

**Line 3a statement**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Founda- tion status of re- cipient	Purpose of grant or contribution	Person or Business Checkbox  Amount
<b>a Paid during the year</b>				
Adam Black 5009 Lippincott Burton MI 48519	None	N/A	Education	Person or <input checked="" type="checkbox"/> Business <input type="checkbox"/> 1,000.
Chelsie Mitchell 8030 Bristol Road Swartz Creek MI 48473	None	N/A	Education	Person or <input checked="" type="checkbox"/> Business <input type="checkbox"/> 1,000.
Ashley Parsons 5332 N. Water Road Sanford MI 48657	None	N/A	Education	Person or <input checked="" type="checkbox"/> Business <input type="checkbox"/> 1,000.
Aubrey Kellerman 809 Layman Crock Circle Grand Blanc MI 48439	None	N/A	Education	Person or <input checked="" type="checkbox"/> Business <input type="checkbox"/> 1,000.
Courtney Rivette 2492 Chesaning Road Montrose MI 48457	None	N/A	Education	Person or <input checked="" type="checkbox"/> Business <input type="checkbox"/> 1,000.
Danielle Rohac 12244 W. Burt Road St. Charles MI 48655	None	N/A	Education	Person or <input checked="" type="checkbox"/> Business <input type="checkbox"/> 1,000.
				Person or <input type="checkbox"/> Business <input type="checkbox"/>
				Person or <input type="checkbox"/> Business <input type="checkbox"/>
Katie Webster 1460 Beaumont Circle Flushing MI 48433	None	N/A	Education	Person or <input checked="" type="checkbox"/> Business <input type="checkbox"/> 1,000.
Jamie Boa 1499 Wiggins Road Fenton MI 48430	None	N/A	Education	Person or <input checked="" type="checkbox"/> Business <input type="checkbox"/> 1,000.

Total

8,000.

Form 990-PF, Page 1, Part I

**Line 16b - Accounting Fees**

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Wrubel, Wesley & Co.	Bookkeeping	875.			
Total		<u>875.</u>			

Form 990-PF, Page 1, Part I

**Line 16c - Other Professional Fees**

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
T.I.C. International	Administration fees	300.			
Total		<u>300.</u>			

# **SCHOLARSHIP FUND OF FLINT PLUMBING & PIPEFITTING INDUSTRY**

**GENERAL INSTRUCTIONS:** All items on this form must be answered. If any item is not applicable, please indicate with the initials "NA". Explanations should be provided on blank sheets of paper and should be attached to this form for items requiring explanations. These sheets of paper may be used to provide information concerning a matter for which inadequate space is provided on the form. Each item on this separate sheets should be numbered corresponding to the item number to which it relates on the application form.

1. Name in full \_\_\_\_\_  
(If Mrs., indicate maiden name) \_\_\_\_\_

1a. Social Security No. \_\_\_\_\_

2. Mailing address and telephone number: \_\_\_\_\_  
\_\_\_\_\_

3. Permanent address and telephone number (if different) \_\_\_\_\_  
\_\_\_\_\_

3. Date of Birth: \_\_\_\_\_ 5. Date of Application: \_\_\_\_\_

6. Name and address of Father: \_\_\_\_\_  
\_\_\_\_\_

7. Name and address of Mother: \_\_\_\_\_  
\_\_\_\_\_

8. Name and address of Guardian: \_\_\_\_\_  
\_\_\_\_\_

9. Military Service/Dates: \_\_\_\_\_

10. List in chronological order each College, University and Training or Vocational institution in which you have attended:

High School: \_\_\_\_\_ Graduation date: \_\_\_\_\_

College/University/ Training Schools	City	State	Attended From	To	Units Completed	Cert./ Degree
---	------	-------	------------------	----	--------------------	------------------

1)	_____					
2)	_____					
3)	_____					
4)	_____					
5)	_____					

11. List the educational or training institutions which you plan to attend: \_\_\_\_\_

12. Have you received any scholarships? \_\_\_\_\_ Yes \_\_\_\_\_ No. If yes, what kind and how much? \_\_\_\_\_

13. Why do you feel that you are deserving of this award? (100 words). \_\_\_\_\_

### CHECK LIST FOR APPLICANTS

1. Completed application
2. Official **TRANSCRIPTS** from each institution attended.
3. **INCOMPLETE** applications will not be considered.

### FOR OFFICIAL USE ONLY

Scholarship recommended: \_\_\_\_\_ Yes \_\_\_\_\_ NO

Date granted: \_\_\_\_\_

Signatures: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

STATEMENT OF APPLICANT

I claim eligibility for a scholarship award as the son or daughter of:

\_\_\_\_\_ A member of Local Union 370

\_\_\_\_\_ An Owner

\_\_\_\_\_ A parent who at the time of his/her death was a member of  
the local, or an owner whose name and address was: \_\_\_\_\_

I hereby certify that all information contained in this application and the accompanying papers and documents are true and accurate to the best of my knowledge and belief.

If an award is granted to me, I hereby agree to repay the amount of the award to the Scholarship Fund in the event I do not attend the college or training institution for which the award is granted, or I drop out or discontinue my attendance prior to the completion of the academic year or term to pursue or make progress in the course of instruction or training for which the award is granted, or I fail to provide the Scholarship Committee with a progress report of such education or training at the time and manner as required by the Scholarship committee, or I provide false or misleading information to the Scholarship Trustees or the Scholarship Committee; provided repayment will not be required in the event of serious illness, induction into the armed forces of the United States, or for any other good and sufficient cause to which I was not a material and culpable contributing factor, all as determined by the Scholarship Committee to be justifiable in their sole judgment.

\_\_\_\_\_

Date

\_\_\_\_\_

Signature of Applicant

STATEMENT BY PARENT OR GUARDIAN

I hereby reviewed this application, together with the accompanying papers and document, and hereby declare that all information contained therein is true and accurate to the extent that I have any knowledge or belief concerning such information.

If an award is granted to the applicant, I hereby agree to repay the amount of the award to the Scholarship Fund in the event such repayment is required of the applicant in accordance with terms of this application and in the event the applicant fails to make such repayment. This repayment shall be paid into the Scholarship Fund within 60 days after which demand for the payment has been made by the Scholarship Trustees.

\_\_\_\_\_

Date

\_\_\_\_\_

Parent or Guardian's Signature

**SCHOLARSHIP FUND OF FLINT PLUMBING AND  
PIPEFITTING INDUSTRY GRANT MAKING PROCEDURES**

**SECTION 1**

**I. CRITERIA FOR SELECTION OF SCHOLARSHIP RECIPIENTS**

A. Recipient is enrolling in or continuing his or her education in an accredited learning institution described in Internal Revenue Code Section 151~~(b)~~(4) ; and recipient is pursuing a full time education course (minimum of 12 credit hours) with the objective of obtaining a degree. A dean's acceptance letter has been received.

B. Recipient is a "young" person; has demonstrated industrious habits by either or both prior school marks and holding a job while in school; recipient is either a son or daughter of:

(a) Individuals who are dues paying members of the union;

(b) Individuals who are sons and daughters of owner(s) who have paid wages to a union member under the Collective Bargaining Agreement;

(c) Individuals who are sons and daughters of deceased individuals who, at the time of their death, met the requirements of either (a) or (b) above.

C. Renewals of grants shall be based upon recipient's actual past academic performance while receiving grants. All prior grades must be submitted for the Scholarship Committee's inspection.

D. Recipient shall not be related to any "disqualified person" within the meaning of the Internal Revenue Code. Recipient shall complete an application form (a copy of which is attached hereto).

E. Recipient is entitled to a maximum of five (5) annual grants. After receiving grants from the Scholarship Fund for five (5) years, recipient is no longer eligible to participate in the Scholarship Fund Program.

F. Recipient must be enrolled as an undergraduate student taking a minimum of 12 credit hours per semester and 24 credit hours per school year. Further, recipient must provide proof of a passing grade in all courses taken in order to be eligible for further scholarship grants. Graduate students are not eligible for scholarship grants.

G. New applicants for scholarship grants shall be given priority over 5<sup>th</sup> year applicants. Fifth (5<sup>th</sup>) year applicants are only eligible if there are scholarship grants available after giving consideration and awarding scholarship grants to all first through fourth year applicants.

## II. ACTUAL GRANT MAKING PROCEDURE BY THE SCHOLARSHIP COMMITTEE

The Scholarship Committee shall have the applicant submit upon a form his school objective, his prior school experience, and any other evidence that indicates that he is a serious scholar, and that he is ambitious and industrious. The Scholarship Committee shall examine the school to which the applicant intends to apply for admission in order to ascertain that the school, college, or university is a fully accredited institution, and that the student has received a letter admitting him to the school.

The application will then be submitted to the Scholarship Committee for a decision. The Scholarship Committee will determine whether there is any relationship which would characterize the child as a "disqualified person"; whether any indirect benefit would come to the grantor contributors.

Finally, the Scholarship Committee will inform the applicant as to the approval or rejection of his application. At that time, if approved, a payment will be made either directly to the educational institution for tuition, or in part to the student to be paid to the educational institution.

The amounts of the grants shall be \$1,000.00 each, and the files of each recipient are available for further inspection to the Internal Revenue Service.

## **SECTION 2**

### **APPLICATION FOR GRANT MAKING APPROVAL IN ADVANCE BY THE INTERNAL REVENUE SERVICE**

#### I. GROUP CONSTITUTING POTENTIAL GRANT RECIPIENTS

Grants may be awarded to sons and daughters of:

(a) Individuals who are dues paying members of the union and who, at December 31 immediately preceding the year of the award, are not delinquent in paying such dues and have had 3,000 hours of work under the Collective Bargaining Agreement in the immediately preceding three years from such December 31;

(b) Individuals who, at the December 31 immediately preceding the year of the grant, are owner(s) provided such owner(s) has paid wages to a union member under the Collective Bargaining Agreement for at least 3,000 hours in the immediately preceding three years from such December 31; and

(c) Deceased individuals who, at the time of their death, met the requirements of either (a) or (b) of this paragraph.

It is hereby declared that race, creed, color, national origin and sex are all irrelevant to the purpose of this Scholarship Fund and such factors shall not be considered in any manner in selecting recipients for grants. Applicants shall have demonstrated industrious school and/or working habits, and such grants may be used for tuition, books and fees, and room and board.

## II. SELECTION CRITERIA

- (a) Past academic performance;
- (b) Formal enrollment acceptance proof;
- (c) Recipient should indicate an interest in the plumbing and pipefitting industry;
- (d) Progress reports containing the submission of school marks as required from time to time for grant renewals and proof that a degree or other appropriate study objective is being actively pursued;
- (e) Recipient is not a "disqualified person"; and
- (f) Full time student taking a minimum of 12 credit hours.
- (g) Recipient's involvement in civic and community activities.

## III. GRANT MAKING PROCEDURES

A. The Scholarship Committee shall be made up of four members, two of whom shall be employers and two from the union, all of whom shall be appointed annually by the Trustees.

B. The Scholarship Committee reviews each application form and interviews potential recipients; the Committee evaluates requests for matching criteria, including whether or not the institution is an accredited school.



C. Grants are made upon presentation of actual bills for tuition, books and fees; and, whenever possible, paid directly to the educational institution.

D. Annually, or more often, progress reports are requested and such reports are required and necessary if the Scholarship committee is considering grant renewals.

E. All applications meeting the criteria are considered.

F. The Scholarship Committee retains a file containing all data on grant recipients and all data from unsuccessful applicants, which file contains evaluations, grantee identification and proof of non-disqualified persons, the amount of the grant and its purpose, and all follow-up data.

G. The Scholarship Committee, being limited by the amount of grant funds available from the Fund, gives special attention to grant renewals if recipient has demonstrated his or her study success at the educational institution and progress toward a degree objective.