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Department of the Treasury

Return of Private Foundation

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

OMB No 1545-0052

| 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees STMT 1 4,132. 0. 1,594. Cother professional fees STMT 3 8,028. 8,028. 0. Interest 18 Taxes STMT 4 403. 403. 0. Depreciation and depletion Coccupancy Travel, conferences, and meetings Printing and publications Other expenses Total expenses and dishursements Total expenses and dishursements | Interr | nal Re | venue Service Note The louiluation may i | be able to use a copy of this | return to satisfy state repor | | |
|--|----------|--------|--|-------------------------------|-------------------------------|-----------------------------|---------------------------|
| Amended return | For | caler | dar year 2009, or tax year beginning NOV | 1, 2009 | , and ending | OCT 31, 2010 | |
| Use the IRS Name of foundation A Employer identification number 39-1613399 | G | Check | all that apply: Initial return | Initial return of a fo | rmer public charity | Final return | . |
| USE of the Total Control of PC Ren Coulter (Final Section 50 (16) (3) exempt private foundation (and the transfer of PC) in the Country of PC (16) (3) exempt private foundation (b) (and the transfer of PC) (b) (c) (c) exempt private foundation (c) (c) (c) (c) exempt private foundation (c) | | | | Address chang | ge | Name change | |
| USE of the Total Control of PC Ren Coulter (Final Section 50 (16) (3) exempt private foundation (and the transfer of PC) in the Country of PC (16) (3) exempt private foundation (b) (and the transfer of PC) (b) (c) (c) exempt private foundation (c) (c) (c) (c) exempt private foundation (c) | Har | . +1 | Name of foundation | | | A Employer identification | number |
| Otherwise, VTCTOR & HELEN GETISEL POUNDATION pital pit | - | | ino | | | | |
| print Number and service (or PC Non-number I rinds a not delevered to sheed add each Roon Number | | | se VICTOR & HELEN GEISEL | FOUNDATION | | 39-1619399 | |
| See Specific Sold FIRST ST See Specific City or town, state, and 2P code Instructions MAISAU WI 54403 Section 501(c)(3) exempt private foundation Fear market value of all assets at end of year J Accounting method: Section 497(4)(1) nonexempt clientable trust Other taxable private foundation Fair market value of all assets at end of year J Accounting method: Size Section 507(0)(1)(A), Certain J Accounting method: Size Section 507(0)(1)(A), Certain Size | | | | | Room/suite | | |
| See Specified Taylor from, state, and ZIP code Instructions WAUSAU WT 54403 H Check type of organization: XI Section 501(c)(3) exempt private foundation Section 4947(a)(1) monempt charitable trust Other type private foundation Tear market value of all assets a end of yar According method: XI Cash Accrual (from Part II, cot.) (c), fine 16) See Specific Taylor (from Part II, cot.) (c), fine 16) Fart II, Asslysis of Revenue and Expenses 1 Contributions, offs, grants 6, tile, and (s) may not recommend by each be absoluted in column (c) must be on cash basis) 1 Contributions, offs, grants, 6, tile, experiend 2 Chest PLX If the fundation state required to state 5 th 8 interests from securities 5 Gross profit or (fless) 1 Contributions, offs, grants, etc., received 2 Chest PLX If the fundation state required to state 5 th 8 interests from securities 5 Gross profit or (fless) 1 Contributions, offs, grants, etc., received 2 Chest PLX If the fundation state required to state 5 th 8 interests from securities 5 Gross profit or (fless) 1 Contributions offs, grants, etc., received 2 Chest PLX If the fundation state required to state 5 th 8 interests from securities 5 Gross profit or (fless) 1 Contributions offs, grants, etc., received 2 Chest PLX If the fundation state required to state 5 th 8 interests from securities 5 Gross profit or (fless) 1 Contributions of the state | | • | | | 1 | - | 36 |
| Instructions MAUSAU WI 54403 | | • | Cific City or town, state, and ZIP code | | | | , m |
| ## Check type of organization: **\begin{align*} Section of 901(c)(3) exempt private foundation** Section 4947(a)(1) nonexempt charitable trust** Other taxable private foundation** Fair market value of all assets at end of year J. According to the fair private foundation Fair market value of all assets at end of year J. According to the fair private foundation statis was terminated under section \$500(f)(%). A check here If private foundation statis was terminated under section \$500(f)(%). A check here If private foundation statis was terminated under section \$500(f)(%). A check here If private foundation statis was terminated under section \$500(f)(%). A check here If private foundation statis was terminated under section \$500(f)(%). A check here If private foundation statis was terminated under section \$500(f)(%). A check here If private foundation statis was terminated under section \$500(f)(%). A check here If private foundation statis was terminated under section \$500(f)(%). A check here If private foundation statis was terminated under section \$500(f)(%). A check here If private foundation statis was terminated under section \$500(f)(%). A check here If private foundation statis was terminated under section \$600(f)(%). A check here If the foundation statis was terminated under section \$600(f)(%). A check here If the foundation statis was terminated under section \$600(f)(%). A check here If the foundation statis was terminated under section \$600(f)(%). A check here If the foundation statis was terminated under section \$600(f)(%). A check here If the foundation statis was terminated under section \$600(f)(%). A check here If the foundation statis was terminated under section \$600(f)(%). A check here If the foundation statis was terminated under section \$600(f)(%). A check here If the foundation statis was terminated under section \$600(f)(%). A check here If the foundation statis was terminated under section \$600(f)(%). A check here If the foundation statis | inst | ructio | ane I | | | | |
| Section 4947(a)(1) anoexempt charable frust | H (| Check | | empt private foundation | -1 | 2. Foreign organizations me | eting the 85% test, |
| Fair market value of all assets at end of year Accounting method: Cash Accrual Under section 507(b)(1)(A), check here If the foundation is a 46 Accounting method: Other (specify) Other (speci | Ϊ, | | · · · · · · · · · · · · · · · · · · · | * * | ition | • | |
| ## If the foundation is in a 60-month termination and each of the foundation is in a 60-month termination and expensive and the foundation is in a 60-month termination and expensive and the foundation is in a 60-month termination and expensive and the foundation of the foundation and expensive and the foundation of the foundation and expensive and the foundation and expensive and the foundation of the foundation and each of the foundation | F: | | | | | | |
| ►S 461, 505. (Part I. column (c) must be on cash bases) under section 507(b)(1)(B), check here ► | | | · [| • | | | |
| Part | - | | | | pasis) | | |
| 1 Contributions, gits, grants, etc., received N/A | | | | | | | |
| 1 Contributions, girls, girants, etc., received 2 Circles X Interest an advanced by the contributions of the topathetes in external to brack 5 8 Interest and the season and depletion 2 10,007. | | 41 L I | (The total of amounts in columns (b), (c), and (d) may not | | | | for charitable purposes |
| 2 Chees | | 1 | | | | NJ / A | (Cash Dasis Only) |
| Interest on awrings and temporary | | | | - | | M/A | |
| Page 2 Page 3 P | | 2 | Interest on savings and temporary | | | | |
| 5a Gross rents b Net rental momen or (loss) 6a Net again of locals from sale of assets not on line 10 | | 3 | cash investments | 12 604 | 12 604 | | |
| D Net rental income or (loss) 68 Net gain or (loss) from sale of assets not on line 10 10 , 077 . 10 | | i . | | 12,004. | 14,004. | | |
| Same | | 1 . | | | | | |
| D Cross sales price for all 58,751. D Cross sales price for all 58,751. T Capital gain not income (from Part IV, fine 2) Net short-term capital gain on income modifications | | _ | · · · · · · · · · · · · · · · · · · · | 10 077 | | | |
| 8 Net snort-term capital gain 9 Income modifications 10a and disvances b Less Cost of poods acid c Gross profit or (loss) 11 Other income 12 Total Add lines 1 through 11 22, 681. 22, 681 | ē | 6a | | 10,0/7. | | | |
| 8 Net snort-term capital gain 9 Income modifications 10a and disvances b Less Cost of poods acid c Gross profit or (loss) 11 Other income 12 Total Add lines 1 through 11 22, 681. 22, 681 | Reven | b | assets on line 6a | | 10 000 | | |
| 8 Net snort-term capital gain 9 Income modifications 10a and disvances b Less Cost of poods acid c Gross profit or (loss) 11 Other income 12 Total Add lines 1 through 11 22, 681. 22, 681 | | 7 | | | 10,077. | | |
| 10a and allowances | | 8 | | | | TEO SIV | |
| 10 2 2 3 5 5 5 5 5 5 5 5 5 | | 9 | | | | ABIA | |
| C Gross profit or (loss) 11 Other income 12 Total Add lines 1 through 11 22,681. 22,681. 375. | | 10a | and allowances | | | Høl | |
| 11 Other income 12 Total Add lines 1 through 11 22,681. 22,681 | | b | Less Cost of goods sold | | | 11º APR 25 2 | |
| 12 Total Add lines 1 through 11 22,681. 22,681. 375. | | C | Gross profit or (loss) | | | | [& |
| 13 Compensation of officers, directors, trustees, etc 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees STMT 1 4 132 0 4 132 1 594 0 1 594 0 1 594 0 0 1 594 0 0 0 0 0 0 0 0 0 | | 11 | Other income | | | OODEN | اعت الت |
| 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees STMT 1 | | 12 | Total Add lines 1 through 11 | | | AAREM | |
| 15 Pension plans, employee benefits 16a Legal fees STMT 1 4 132 0 0 1 1594 0 0 1 1594 0 0 1 1594 0 0 0 0 0 0 0 0 0 | | 13 | Compensation of officers, directors, trustees, etc | 750. | 375. | | 375. |
| 16a Legal fees STMT 1 | | 14 | Other employee salaries and wages | | | | |
| 25 Contributions, grits, graits paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | | 15 | Pension plans, employee benefits | | | | |
| 25 Contributions, grits, graits paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | ses | 16a | Legal fees STMT 1 | | | | 4,132. |
| 25 Contributions, grits, graits paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | ĕ | b | Accounting fees STMT 2 | | | | 1,594. |
| 25 Contributions, grits, graits paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | Ä | C | Other professional fees STMT 3 | | 8,028. | | 0. |
| 25 Contributions, grits, graits paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | Ve. | 17 | | | | | |
| 25 Contributions, grits, graits paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | rati | 18 | Taxes STMT 4 | 403. | 403. | | 0. |
| 25 Contributions, grits, graits paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | ist | 19 | | | | | |
| 25 Contributions, grits, graits paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | Ë | 20 | • | | | | |
| 25 Contributions, grits, graits paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | Adı | 21 | | | | | |
| 25 Contributions, grits, graits paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | 2 | 22 | | | | | |
| 25 Contributions, grits, graits paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | g | 23 | | | | | - |
| 25 Contributions, grits, graits paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | Ē | 24 | | | | | |
| 25 Contributions, grits, graits paid 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | era | [] | | 14 907 | 8 806 | 1 | 6 101 |
| 26 Total expenses and disbursements Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | , g | 25 | | 12 350 | 0,000. | | 12 350 |
| Add lines 24 and 25 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | • | 1 | | 14,550 | | | 14,550. |
| 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | 3 | 20 | • | 27 257 | 8 806 | Ì | 1 2 451 |
| a Excess of revenue over expenses and disbursements b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | <u></u> | 27 | | 41,4310 | | | 10,431 |
| b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A | Ē | 1 | | _1 576 | | | |
| C Adjusted net income (if negative, enter -0-) | • | ı | | -4,5/0. | 12 975 | - | |
| | 1 | 1 | | | 13,0/3. | NI / A | |
| | | | | Ant Notice and the inction | tions | IN/A | Form 990-DF (2000) |

Form **990-PF** (2009)

Balance Sheets Attached schedules and amounts in the description Beginning of year End of year Part II (a) Book Value (b) Book Value (c) Fair Market Value 1,428. 2,519 1 Cash - non-interest-bearing 2,519. 30,815. 1,885. 2 Savings and temporary cash investments 1,885. 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 STMT 6 121,711. 122,057. 126,992. 186,787. 169,294. 240,927. b Investments - corporate stock STMT 30,175. 61,176. STMT 8 64,821. c Investments - corporate bonds 11 Investments - land, buildings, and equipment basis Less accumulated degreciation 12 Investments - mortgage loans STMT 9 16,303. 25,712. 24,361. 13 Investments - other 14 Land, buildings, and equipment basis Less accumulated depreciation 15 Other assets (describe ▶ 387,219. 382,643. 461,505. 16 Total assets (to be completed by all filers) 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 23 Total liabilities (add lines 17 through 22) 0 0 Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. Net Assets or Fund Balances 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted **▶** 🗓 Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipment fund 0. 0 387,219. 382,643 29 Retained earnings, accumulated income, endowment, or other funds 387,219. 382,643 30 Total net assets or fund balances 387,219 31 Total liabilities and net assets/fund balances 382,643 Part III Analysis of Changes in Net Assets or Fund Balances 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) 387,219. 2 Enter amount from Part I, line 27a -4,576.3 Other increases not included in line 2 (itemize) 3 Add lines 1, 2, and 3 4 382,643. Decreases not included in line 2 (itemize) 5 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 382,643.

VICTOR & HELEN GEISEL FOUNDATION

<u>39-1619399</u>

Form **990-PF** (2009)

Form 990-PF (2009)

| (a) List and | d describe the k | and(s) of property sold (e.g. or common stock, 200 sh | j., real estate, | | (b) Hov P - P | w acquired furchase Conation | (c) Date a | | (d) Date sold (mo., day, yr.) |
|---|-------------------------------------|--|-----------------------|--------------------------------------|--------------------------|------------------------------------|--|-------------------------------|---|
| 1a | | | | | 0-6 | ronautii | · | • | |
| b SEE ATTACI | HED STA | TEMENT | | | - | | | | |
| C | | | | | · | | | | |
| d | | | | | | | | | |
| e | . , | | | | | | | | |
| (e) Gross sales price | (f) | Depreciation allowed (or allowable) | | st or other basis expense of sale | | | | in or (loss) (f) minus (| |
| _a | | | ļ | | | | | | |
| <u>b</u> | | | | | | | | | |
| <u>C</u> | | | | | - | | | | |
| d | -1 | | | 40 67 | 4 | | | | 10 077 |
| e 58,75 | | column (h) and owned by | the foundation | 48,674 | 4. | | \ O==== (O | al (b) -a | 10,077. |
| Complete only for assets s | | | Т. | | $\overline{}$ | (I col |) Gains (G . (k). but n | ol. (h) gain iot less thai | minus 1 -0-) or |
| (i) F.M.V. as of 12/31/69 | | (j) Adjusted basis as of 12/31/69 | | cess of col. (1) col. (1), if any | | | | (from col. (| |
| | | | | | | | | | |
| b | | | † | | \dashv | | | | |
| C | | | | | \dashv | | | | |
| d | | | | | | | | | |
| e | | | | | | | | - | 10,077. |
| | , | ∫ If gain, also ente | r in Part I. line | 7 | 1 | - | | | • |
| 2 Capital gain net income or (| net capital loss | |)- ın Part I, line | 7 | | 2 | | | 10,077. |
| 3 Net short-term capital gain | or (loss) as del | ` | | | | | | | |
| If gain, also enter in Part I, | | | (· / · | | } | | | | |
| If (loss), enter -0- in Part I, Part V Qualification | line 8 | Section 4940(e) for | . | | نال | 3 | | N/A | |
| If section 4940(d)(2) applies, li Was the foundation liable for th If "Yes," the foundation does no | ne section 4942 ot qualify under | tax on the distributable an section 4940(e). Do not co | omplete this pa | ırt. | | | | | Yes X No |
| 1 Enter the appropriate amou | | mn for each year; see instr | uctions before | making any entries | s. | | | | 2.0 |
| (a) Base period year Calendar year (or tax year b | s eginning in) | (b) Adjusted qualifying dis | | Net value of non | | | | Dıstrıt (col. (b) dıv | (d) oution ratio rided by col. (c)) |
| 2008 | | | 1,042. | | | 419,233 | _ | | .050192 |
| 2007 | | | 27,175. | | | 524,148 | | | .051846 |
| 2006 | | | 24,071. | | | 530,095 | | | .045409 |
| 2005 | · | | 23,133. 20,250. | | | 488,628 | | | .047343 |
| 2004 | | | 10,250. | · | <u>`</u> | 480,899 | ' • | | .042105 |
| 2 Total of line 1, column (d) | | | | | | | 2 | | .236899 |
| 3 Average distribution ratio for | or the 5-vear ha | se nerind - divide the total | on line 2 hv 5 | or by the number of | of vears | | - | | • 230093 |
| the foundation has been in | | | on mic z by o, | or by the number t | or yours | , | 3 | | .047380 |
| and realitation has been in | oo. | , man o youro | | | | | | | .01/500 |
| 4 Enter the net value of noncl | narıtable-use as | sets for 2009 from Part X, | line 5 | | | | 4 | | 453,206 |
| 5 Multiply line 4 by line 3 | | | | | | | 5 | | 21,473 |
| 6 Enter 1% of net investment | ıncome (1% o | Part I, line 27b) | | | | | 6 | | 139 |
| 7 Add lines 5 and 6 | | | | | | | 7 | | 21,612 |
| 8 Enter qualifying distribution | s from Part XII | , line 4 | | | | | 8 | | 18,451 |
| If line 8 is equal to or greate See the Part VI instructions | | neck the box in Part VI, line | e 1b, and comp | lete that part using | g a 1% | tax rate. | | | |

| | | | <u>619.</u> | | | age 4 |
|----|--|--------|-------------|-----------------|-------|-------------|
| | irt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 49 | 48 - : | see in | stru | ction | <u>(S)</u> |
| 1a | Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1. | | | | | |
| | Date of ruling or determination letter: (attach copy of letter if necessary-see instructions) | | | | | |
| b | Domestic foundations that meet the section 4940(e) requirements in Part V, check here and enter 1% | 1 | | | 2' | <u> 78.</u> |
| | of Part I, line 27b | | | | | |
| | All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b) | | | | | _ |
| | 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 | _ | | 2 | 78. |
| 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 | | | 2 | 78. |
| | Credits/Payments: | | | | | |
| | 2009 estimated tax payments and 2008 overpayment credited to 2009 6a 178. | | | | | |
| | Exempt foreign organizations - tax withheld at source 6b | | | | | |
| | Tax paid with application for extension of time to file (Form 8868) Beal or with helding agreement withheld. | | | | | |
| | Backup withholding erroneously withheld Table and assemble Add less Sa through Sd | . | | | 1 | 70 |
| | Total credits and payments. Add lines 6a through 6d | 7 | | | | <u>78.</u> |
| | Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached | 8 | | | 1 | 00. |
| | Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed | 9 | | | т, | 00. |
| | Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | 10 | | | | |
| | Enter the amount of line 10 to be: Credited to 2010 estimated tax ▶ Refunded ▶ Int VII-A Statements Regarding Activities | 11 | <u>.</u> | - | | |
| - | | | | | Yes | No |
| ıa | During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene if any political campaign? | | } | 10 | . 63 | |
| | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? | | } | <u>1a</u> 1b | | X |
| U | If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published | or | ŀ | וט | | |
| | distributed by the foundation in connection with the activities | Oi . | | | | |
| | Did the foundation file Form 1120-POL for this year? | | | 1c | | х |
| | Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: | | ŀ | 16 | | |
| u | (1) On the foundation. \$ (2) On foundation managers \$ \$ \$ | | | | | |
| | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation | | | | | |
| t | managers. > \$ 0. | | | | | |
| 2 | Has the foundation engaged in any activities that have not previously been reported to the IRS? | | | 2 | | х |
| 2 | If "Yes," attach a detailed description of the activities | | | | | |
| 3 | Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or | | | | | |
| Ü | bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes | | | 3 | | _X_ |
| 42 | Did the foundation have unrelated business gross income of \$1,000 or more during the year? | | | 4a | | X |
| | If "Yes," has it filed a tax return on Form 990-T for this year? | N/ | 'A | 4b | | |
| | Was there a liquidation, termination, dissolution, or substantial contraction during the year? | , | | 5 | | X |
| ٠ | If "Yes," attach the statement required by General Instruction T. | | | . • | | |
| 6 | Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: | | | | | |
| Ť | 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 legislation. | aw | | | | |
| | remain in the governing instrument? | | | 6 | х | |
| 7 | Did the foundation have at least \$5,000 in assets at any time during the year? | | | 7 | Х | |
| | If "Yes," complete Part II, col (c), and Part XV | | | | | |
| 8a | Enter the states to which the foundation reports or with which it is registered (see instructions) | | | | | |
| | WI | | | | | |
| b | If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) | | | | | |
| | of each state as required by General Instruction G? If "No," attach explanation | | | 8b | х | |
| 9 | Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calen | dar | | | | |
| | year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? If "Yes," complete Part XIV | | | 9 | | X |
| 10 | Did any persons become substantial contributors during the tax year? If types attach a schedule listing their names and addresses | | | 10 | | x |

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|--|---|--------------------------------|--|--------------|-----------------------------|
| Part VII-B. Statements Regarding Activities for Which I | Form 4720 May Be F | Required (continu | ued) | | |
| 5a During the year did the foundation pay or incur any amount to: | | <u></u> | | | |
| (1) Carry on propaganda, or otherwise attempt to influence legislation (section | | | s X No | | |
| (2) Influence the outcome of any specific public election (see section 4955); o | or to carry on, directly or indire | | | | |
| any voter registration drive? | | | s X No | | |
| (3) Provide a grant to an individual for travel, study, or other similar purposes | ? | Ye | s 🗶 No | | |
| (4) Provide a grant to an organization other than a charitable, etc., organization | n described in section | | | | |
| 509(a)(1), (2), or (3), or section 4940(d)(2)? | | X Ye | s 🔲 No 📗 | | |
| (5) Provide for any purpose other than religious, charitable, scientific, literary, | or educational purposes, or f | | | | |
| the prevention of cruelty to children or animals? | | L Ye | s 🗶 No 📗 | ł | |
| b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify unit | der the exceptions described i | n Regulations | | | |
| section 53.4945 or in a current notice regarding disaster assistance (see instru | ictions)? | | <u> </u> | 5b | X |
| Organizations relying on a current notice regarding disaster assistance check h | | | | | ļ |
| c If the answer is "Yes" to question 5a(4), does the foundation claim exemption f | rom the tax because it maintai | | | | |
| expenditure responsibility for the grant? | | X Ye | s L No | | |
| If "Yes," attach the statement required by Regulations section 53 494. | 5-5(d) | | | | |
| 6a Did the foundation, during the year, receive any funds, directly or indirectly, to | pay premiums on | | | | |
| a personal benefit contract? | | Ye | s X No | | |
| b Did the foundation, during the year, pay premiums, directly or indirectly, on a p | personal benefit contract? | | | 6b | <u> X</u> |
| If "Yes" to 6b, file Form 8870 | | | | | |
| 7a At any time during the tax year, was the foundation a party to a prohibited tax s | shelter transaction? | Ye | s 🗶 No 📙 | | |
| b If yes, did the foundation receive any proceeds or have any net income attribut | | | | 7b | |
| Part VIII Information About Officers, Directors, Trust Paid Employees, and Contractors | ees, Foundation Ma | nagers, Highly | / | | |
| 1 List all officers, directors, trustees, foundation managers and their | compensation. | | | | |
| | (b) Title, and average hours per week devoted | (c) Compensation (If not paid, | (d) Contributions to employee benefit plans | (e) | Expense unt, other |
| (a) Name and address | to position | enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | allo | owances |
| ANNE G. FREDLUND | PRES/DIR | | 1 | | |
| 55 STONE FENCE ROAD | _ | | | | |
| ROCHESTER, NY | 0.50 | 250. | 0. | | 0. |
| LON E ROBERTS | SECRETARY/TRE | ASURER/DI | R | | |
| 500 FIRST STREET | _ | | | | |
| WAUSAU, WI | 0.50 | 0. | 0. | | 0. |
| JOHN FREDLUND | VICE PRESIDEN | r/DIR | | | |
| 500 FIRST STREET | | | | | |
| WAUSAU, WI | 0.50 | 250. | 0. | | 0. |
| VICKY FEATHERS | DIRECTOR | | | 1 | |
| 500 FIRST STREET | | | | | |
| WAUSAU, WI | 0.50 | 250. | <u> </u> | | 0. |
| 2 Compensation of five highest-paid employees (other than those inc | | enter "NONE." | (d) Contributions to | 1 | |
| (a) Name and address of each employee paid more than \$50,000 | (b) Title, and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans and deferred compensation | acco all | Expense ount, other owances |
| NONE | | | | | |
| | | | | | |
| <u> </u> | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | - | | | | |
| | | | _ | | |
| | - | | | | |
| Total number of other employees paid over \$50,000 | | 1 | <u> </u> | | . 0 |
| TOTAL HUMBER OF OTHER CHIPTOYCCS PAID OVER \$50,000 | | | | | <u></u> |

| Form 990-PF (2009) VICTOR & HELEN GEISEL FOUNDATION | 39-1 | .619399 Page |
|--|---------------------|---------------------------------------|
| Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued) | Managers, Highly | |
| 3 Five highest-paid independent contractors for professional services. If none, enter "NON | E." | |
| (a) Name and address of each person paid more than \$50,000 | (b) Type of service | (c) Compensati |
| NONE | | |
| | | |
| | | |
| | | · |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| Total number of others receiving over \$50,000 for professional services | | • |
| Part IX-A Summary of Direct Charitable Activities | | |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical info number of organizations and other beneficiaries served, conferences convened, research papers produced, et | rmation such as the | Expenses |
| | lu. | |
| 1 N/A | | |
| | | |
| 2 | | |
| | | |
| | | |
| 3 | | · · · · · · · · · · · · · · · · · · · |
| | | |
| | | |
| 4 | | |
| | | |
| | | |
| Part IX-B Summary of Program-Related Investments | | |
| Describe the two largest program-related investments made by the foundation during the tax year on lines 1 a | and 2. | Amount |
| 1 NONE | | |
| | · . | |
| | | |
| 2 | | |
| | | |
| All the second state of th | | |
| All other program-related investments. See instructions. | | |
| 3 NONE | | |
| | | , |
| Total, Add lines 1 through 3 | | (|
| Total, Add into 1 tillough o | | · · · · · · · · · · · · · · · · · · · |

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| Р | art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four | ndations, | see instructions) |
|----|--|--------------|-------------------|
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: | | |
| a | Average monthly fair market value of securities | 1a | 457,611. |
| b | Average of monthly cash balances | 1b | 2,497. |
| C | Fair market value of all other assets | 1c | |
| d | Total (add lines 1a, b, and c) | 1d | 460,108. |
| е | Reduction claimed for blockage or other factors reported on lines 1a and | | |
| | 1c (attach detailed explanation) <u>1e</u> 0. | | |
| 2 | Acquisition indebtedness applicable to line 1 assets | 2 | 0. |
| 3 | Subtract line 2 from line 1d | 3 | 460,108. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 6,902. |
| 5 | Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 453,206. |
| 6 | Minimum investment return Enter 5% of line 5 | 6 | <u> 22,660.</u> |
| P | art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here and do not complete this part.) | d certain | |
| 1 | Minimum investment return from Part X, line 6 | 1 | 22,660. |
| 2a | Tax on investment income for 2009 from Part VI, line 5 | | |
| b | Income tax for 2009. (This does not include the tax from Part VI.) | | |
| C | Add lines 2a and 2b | 2c | 278. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 22,382. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 22,382. |
| 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 | 22,382. |
| P | art 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 | 18,451. |
| 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: | | |
| | 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 | 18,451. |
| 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 | 18,451. |
| | Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of | qualifies fo | or the section |

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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, | | | | 22 222 |
| line 7 | | - 1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1 | | 22,382. |
| 2 Undistributed income, if any, as of the end of 2009 | | | 0. | |
| a Enter amount for 2008 only | | | U • . | |
| b Total for prior years: | | 0. | | |
| Freeze detributions corrupter if any to 2000: | - | U • | | , |
| 3 Excess distributions carryover, if any, to 2009: | | | | |
| a From 2004 | | | | |
| b From 2005 | | | | |
| c From 2006 | | | | |
| d From 2007 1,436. e From 2008 204. | | | | |
| _ | 1 (40 | | | |
| f Total of lines 3a through e | 1,640. | ********** | | |
| 4 Qualifying distributions for 2009 from | | | | |
| Part XII, line 4: ► \$ 18,451. | | | 0. | |
| a Applied to 2008, but not more than line 2a | | | U . | |
| b Applied to undistributed income of prior | | 0 | | |
| years (Election required - see instructions) | | 0. | | |
| c Treated as distributions out of corpus | | | | |
| (Election required - see instructions) | 0. | | | 10 451 |
| d Applied to 2009 distributable amount | | | | 18,451. |
| e Remaining amount distributed out of corpus | 0. | | | 1 (40 |
| Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a)) | 1,640. | | | 1,640. |
| 6 Enter the net total of each column as indicated below: | | | | |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | 0. | | | |
| 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 | | | | 2,291. |
| 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 | 0. | | | |
| 9 Excess distributions carryover to 2010. | | | | |
| Subtract lines 7 and 8 from line 6a | 0. | | | |
| 10 Analysis of line 9: | | | | |
| a Excess from 2005 | | | | |
| b Excess from 2006 | | | | |
| c Excess from 2007 | | | | |
| d Excess from 2008 | | | | |
| e Excess from 2009 | | | 1 | |
| | | | | Form 990-PF (2009) |

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|--|--|--|---------------------------|-----------------------------|---------------------------------------|
| <u> </u> | | | -A, question 9) | N/A | |
| 1 a If the foundation has received a ruling of foundation, and the ruling is effective for | | · · · · · · · · · · · · · · · · · · · | | | |
| | | _ | n cootion | 4942(j)(3) or 4 | 942())(5) |
| b Check box to indicate whether the found | Tax year | ig foundation described i | Prior 3 years | <u> </u> | 942(j)(5) |
| 2 a Enter the lesser of the adjusted net | (a) 2009 | (b) 2008 | (c) 2007 | (d) 2006 | (e) Total |
| income from Part I or the minimum | (4) 2000 | (0) 2000 | (0) 2001 | (4) 2000 | (0) 10121 |
| investment return from Part X for | | | | | |
| each year listed | | | | | |
| b 85% of line 2a | - | | | | |
| c Qualifying distributions from Part XII, | | | | | |
| line 4 for each year listed | <u>-</u> | | | | |
| d Amounts included in line 2c not | | | | | |
| used directly for active conduct of | | | | | |
| exempt activities | | <u> </u> | | - | |
| e Qualifying distributions made directly | | | | | |
| for active conduct of exempt activities. | | | | | |
| Subtract line 2d from line 2c 3 Complete 3a, b, or c for the | | | | | |
| alternative test relied upon: | | | |] | |
| a "Assets" alternative test - enter:(1) Value of all assets | | | | | |
| (2) Value of assets qualifying under section 4942(j)(3)(B)(i) | | | | | |
| b "Endowment" alternative test - enter 2/3 of minimum investment return | | | | | |
| shown in Part X, line 6 for each year listed | | | | | |
| c "Support" alternative test - enter: | | | · | | |
| (1) Total support other than gross | | | | | |
| investment income (interest, | | | | | |
| dividends, rents, payments on securities loans (section | | | | | |
| 512(a)(5)), or royalties) | | | | | |
| (2) Support from general public | | | | | - |
| and 5 or more exempt | | | | | |
| organizations as provided in section 4942(j)(3)(B)(iii) | | | | | |
| (3) Largest amount of support from | | | | | |
| an exempt organization | | | | | |
| (4) Gross investment income | | | | | |
| Part XV Supplementary Info | rmation (Comple | te this part only | if the foundation | n had \$5,000 or m | ore in assets |
| at any time during t | the year-see the | instructions.) | | | |
| 1 Information Regarding Foundation | on Managers: | | | | |
| a List any managers of the foundation wh year (but only if they have contributed r | io have contributed more nore than \$5,000). (See s | than 2% of the total cont section 507(d)(2)) | ributions received by th | e foundation before the cl | ose of any tax |
| NONE | | | | | · · · · · · · · · · · · · · · · · · · |
| b List any managers of the foundation when other entity) of which the foundation has | | | (or an equally large port | tion of the ownership of a | partnership or |
| NONE | | | | | |
| 2 Information Regarding Contribut | ion, Grant, Gift, Loan, | , Scholarship, etc., Pr | ograms: | | |
| Check here 🕨 🔲 if the foundation of | only makes contributions | to preselected charitable | organizations and does | not accept unsolicited req | uests for funds. If |
| the foundation makes gifts, grants, etc. | (see instructions) to indiv | viduals or organizations u | inder other conditions, | complete items 2a, b, c, ar | d d. |
| a The name, address, and telephone num | ber of the person to who | m applications should be | addressed: | | |
| SEE STATEMENT 10 | | | | | |
| b The form in which applications should t | oe submitted and informa | tion and materials they sl | nould include: | | |
| c Any submission deadlines: | | | | | |
| | | | <u> </u> | | |
| d Any restrictions or limitations on award | s, such as by geographic | al areas, charitable fields, | kinds of institutions, or | other factors: | |
| | | | | | |

| 3 Grants and Contributions Paid During the Ye | ar or Approved for Future I | 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 |
| | or substantial contributor | recipient | | |
| a Paid during the year | or substantial contributor | recipient | | |
| SEE STATEMENT 11 | | | | |
| Total | · | | ▶ 3a | 12,350. |
| b Approved for future payment | | | | |
| NONE Total | | | ▶ 3b | 0. |

Part XVI-A Analysis of Income-Producing Activities

| Enter gross amounts unless otherwise indicated. | Unrelated | business income | Exclu | ded by section 512, 513, or 514 | (e) |
|---|-------------------|---------------------------------------|---------------|---------------------------------|--|
| Enter gross amounts amous state miss maleutes. | (a) Business | (b) | (C) Exclu- | (d) | Related or exempt |
| 1 Program service revenue: | Business | Amount | sion | Amount | function income |
| | | | 3000 | | |
| | · | | | | |
| | | | | · | |
| c | 1 1 | | | | - |
| d | · | | | | |
| e | · - | | | | |
| _ | | | | | |
| g Fees and contracts from government agencies | ļ | | | | |
| 2 Membership dues and assessments | | | | | |
| 3 Interest on savings and temporary cash | | | | | |
| investments | | | | | |
| 4 Dividends and interest from securities | | . | 14 | 12,604. | |
| 5 Net rental income or (loss) from real estate: | | · | | | |
| a Debt-financed property | | | | | |
| b Not debt-financed property | | | | | |
| 6 Net rental income or (loss) from personal | | | | | |
| property | | | | | |
| 7 Other investment income | | | | | |
| 8 Gain or (loss) from sales of assets other | | | | | |
| than inventory | | | 18 | 10,077. | |
| 9 Net income or (loss) from special events | | · · · · · · · · · · · · · · · · · · · | - | =.5.7 5 7 7 7 | |
| 10 Gross profit or (loss) from sales of inventory | | | | | ************************************** |
| 11 Other revenue: | | | - | | |
| a | 1 | | | | |
| | 1 1 | ·· | | | |
| b | 1 1 | · | | | |
| r | | | | | |
| c | | | | | |
| d | | | | | |
| d | | 0 | | 22 681 | 0 |
| d e 12 Subtotal. Add columns (b), (d), and (e) | | 0. | | 22,681. | 0. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) | | 0. | | 22,681. | 0. 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) | | | | 13 | 0. 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) | | | | 13 | 0. 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |
| d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total Add line 12, columns (b), (d), and (e) (See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities Line No. Explain below how each activity for which incompared to the second | to the Acco | mplishment of Ex | (emp | t Purposes | 22,681. |

| | art X\ | | | | nd Transactions a | nd Relationshi | os With Nonchar | <u>JJJ</u> itabl€ | | ye is_ |
|-----------|--------------------------------|---|---------------------------------|---------------|------------------------------------|---|---------------------------------|----------------------|---------|--------|
| - | • | Exempt Organ | | | | | | | | |
| 1 | Did th | e organization directly or indi | rectly engage in any of the | e following | with any other organization | n described in section | 501(c) of | | Yes | No |
| | the Co | ode (other than section 501(c |)(3) organizations) or in s | ection 527 | , relating to political organi | zations? | | | | |
| ä | Trans | fers from the reporting found | ation to a noncharitable e: | xempt org | anization of | | | | | |
| | (1) C | ash | | | | | | 1a(1) | | _X_ |
| | (2) C | ther assets | | | | | - | 1a(2) | | X |
| t | Other | transactions: | | | | | | | | |
| | (1) S | ales of assets to a noncharita | ble exempt organization | | | | | 1b(1) | | X |
| | (2) P | urchases of assets from a no | ncharitable exempt organ | ıızatıon | | | | 1b(2) | | X |
| | (3) R | ental of facilities, equipment, | or other assets | | | | | 1b(3) | | _X_ |
| | (4) R | eimbursement arrangements | | | | | | 1b(4) | | Х |
| | (5) L | oans or loan guarantees | | | | | | 1b(5) | | Х |
| | (6) P | erformance of services or me | mbership or fundraising: | solicitation | ıs | | | 1b(6) | | X |
| C | : Sharıı | ng of facilities, equipment, ma | iling lists, other assets, or | r paid emp | loyees | | | 1c | | X |
| (| I If the | answer to any of the above is | "Yes," complete the follow | wing sched | lule. Column (b) should alw | ays show the fair mar | ket value of the goods, o | ther ass | ets, | |
| | | vices given by the reporting f | | | d less than fair market value | e in any transaction or | sharing arrangement, sh | IOW IN | | |
| | | n (d) the value of the goods, | | | | | | | | |
| (a) | Line no | (b) Amount involved | | | exempt organization | (d) Description of | transfers, transactions, and s | haring an | rangeme | ents |
| | | | | N/A | | | | | | |
| | | | | | | | | | | |
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| _ | | | <u></u> | | | <u> </u> | | | | |
| 28 | | foundation directly or indirec | - | | | ations described | | _ | | |
| _ | | tion 501(c) of the Code (other | | or in section | on 52/7 | | <u></u> | Yes | LX | No |
| _t |) If Yes | s," complete the following sch | | | (b) Type of organization | (0) | Description of relational | | | |
| | | (a) Name of org | Jamzauvii | | (b) Type of organization | (6) | Description of relationsh | ub | | |
| | | N/A | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | Under p | enalties of gerjury, I declare that I h | nave examined this return, incl | udina accon | npanying schedules and statem | ents, and to the best of m | v knowledge and belief, it is t | rue. corre | ect. | |
| | | plete Declaration of preparer (other | | | | | ,,,,, | , | , | |
| | | tons. // | skels | | 1/20/11 | Sec | iveture | | | |
| ē | Si | nature of officer or trustee | | | Date | Title | | | | |
| 빔 | , 5, | Preparer's | | | | ate Chec | k If Prepare | r's identif | ying nu | mber |
| sign Here | r's > | signature MARY | A. COATES, | CPA | | self- | oyed ▶ □ | | | |
| מ | Paid eparer's se Only | EITDI | LI LLP | CEA | | ·· ' | EIN D | | | |
| | Paid Preparer's Use Only | | OX 8010 | | | <u> </u> | | | | |
| | ادة | | AU, WI 5440 | 2-80 | 10 | | Phone no. 715 – 8 | 345- | 311 | .1 |
| | | | | | | | | <u></u> | | |

715-845-3111 Form **990-PF** (2009)

N/A

Part IV | Capital Gains and Losses for Tax on Investment Income (b) How acquired (a) List and describe the kind(s) of property sold, e.g., real estate, (c) Date acquired (d) Date sold P - Purchase D - Donation 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo., day, yr.) (mo., day, yr.) 1a ARBITRON INC. 10/24/0710/30/09 P P V<u>ARIOUS</u> 07/29/<u>1</u>0 b BP PLC SPONSORED ADR c CANADIAN NATL RY CO COM P 11/15/01|07/29/10 d CENOVUS ENERGY INC COM P 11/13/0201/27/10 e DEERE & COMPANY P <u> VARIOUS |07/31/10</u> ₽ <u> 10/30/09|01/27/1</u>0 f EATON CORP P |07/23/08|01/27/10 g EATON CORP P VARIOUS |07/29/10 h INTEL CORP COM P 10/16/0610/30/09 I LIFE TECHNOLOGIES CORP INIKO RESOURCES LTD P 02/13/0401/27/10 k NIKO RESOURCES LTD P 02/13/0404/29/10 11/15/0410/30/09 I OYO GEOSPACE CORP COM P m SIMS METAL MGMT LTD SPONSORED ADR P <u>07/26/0704/29/10</u> P n SONOSITE INC COM VARIOUS |01/25/10 o NOVOZYMES A/S P |03/07/03|04/30<u>/1</u>0 (g) Cost or other basis (f) Depreciation allowed (h) Gain or (loss) (e) Gross sales price (e) plus (f) minus (g) (or allowable) plus expense of sale -4,249. 3,246. 7,495. a 7,669. 8,282 -613. b <u>3,117.</u> 728. 2,389. C 4,610. 1,320. 3,290. d 2,242. 967. 3,209. 0 е 249. 214 35<u>.</u> f 6,799. 5,966. -8<u>33.</u> 2,088. 2,994. -906. h 4,728. 3,315. 1,413. 1,778. 2,383. 605. 2,667. 605. 2,062. 3,290. 2,006. 1,284. 1 3,802. 5,003. -1,201. m 5,691. 6,003. -312.n 6,036. 1,063. 4,973. 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (i) Adjusted basis (k) Excess of col. (i) (i) F.M.V. as of 12/31/69 but not less than "-0-") as of 12/31/69 over col. (j), if any -4,249. a -613. b 2,389. C 3,290. d 967. е 35. f -833. 9 -906. h 1,413. ı 1,778. 2,062. k 1,284. -1,<u>201.</u> m -312. n 4,973. 0 { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 } 2 Capital gain net income or (net capital loss) 10,077. 2 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

| FORM 990-PF | LEGAL | FEES | S: | PATEMENT 1 |
|------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| LEGAL FEES | 4,132. | 0. | | 4,132. |
| TO FM 990-PF, PG 1, LN 16A = | 4,132. | 0. | | 4,132. |
| FORM 990-PF | ACCOUNTI | NG FEES | S' | PATEMENT 2 |
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| ACCOUNTING FEES | 1,594. | 0. | | 1,594. |
| TO FORM 990-PF, PG 1, LN 16B | 1,594. | 0. | | 1,594. |
| FORM 990-PF C | THER PROFES | SIONAL FEES | S | ratement 3 |
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| INVESTMENT FEES | 8,028. | 8,028. | | 0. |
| TO FORM 990-PF, PG 1, LN 16C | 8,028. | 8,028. | | 0. |
| FORM 990-PF | TAX | ES | S | татемент 4 |
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| | 403. | 403. | | |
| FOREIGN TAXES | 403. | - 05. | | 0. |

FOOTNOTES

STATEMENT

5

INFORMATION REQUIRED PURSUANT TO REG. 53.2925-5(D) PART VII-B, LINE 5A(4)

GRANT MADE TO PRIVATE OPERATING FOUNDATION

- LEIGH YAWKEY WOODSON ART MUSEUM, INC. (GRANTEE) FRANKLIN & TWELFTH STREETS WAUSAU, WI 54403
- II. GRANT OF \$1,100 MADE.
- III. GRANT TO BE USED FOR GEN'L OPERATIONS OF THE MUSEUM.
- GRANTEE WILL USE THE FUNDS FOR THE PURPOSE OF GRANT. IV.
- V. REPORT RECEIVED.
- IV. REPORT VERIFICATION NOT REQUIRED.

| FORM 990-PF U.S. AND STATE/CI | TY GOVERNMENT | OBLIGATIONS | STATEMENT 6 |
|--------------------------------------|---------------------------|-------------|----------------------|
| DESCRIPTION | U.S. OTHER GOV'T GOV'T | BOOK VALUE | FAIR MARKET VALUE |
| FEDERAL GOVERNMENT BONDS | <u>x</u> | 122,057. | 126,992. |
| TOTAL U.S. GOVERNMENT OBLIGATIONS | - | 122,057. | 126,992. |
| TOTAL STATE AND MUNICIPAL GOVERNMENT | OBLIGATIONS | | |
| TOTAL TO FORM 990-PF, PART II, LINE | 10A = | 122,057. | 126,992. |
| FORM 990-PF CORE | PORATE STOCK | | STATEMENT 7 |
| DESCRIPTION | | BOOK VALUE | FAIR MARKET VALUE |
| EQUITIES | _ | 169,294. | 240,927. |
| TOTAL TO FORM 990-PF, PART II, LINE | 10B | 169,294. | 240,927. |
| FORM 990-PF CORE | PORATE BONDS | | STATEMENT 8 |
| DESCRIPTION | | BOOK VALUE | FAIR MARKET VALUE |
| CORPORATE BONDS | - | 61,176. | 64,821. |
| TOTAL TO FORM 990-PF, PART II, LINE | 10C | 61,176. | 64,821. |
| FORM 990-PF OTHER | R INVESTMENTS | | STATEMENT 9 |
| DESCRIPTION | VALUATION METHOD | BOOK VALUE | FAIR MARKET VALUE |
| FOREIGN GOVERNMENT BONDS | COST | 25,712. | 24,361. |
| | | | |

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

STATEMENT 10

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

LON E ROBERTS 500 FIRST STREET WAUSAU, WI 54403

TELEPHONE NUMBER

715-845-4336

FORM AND CONTENT OF APPLICATIONS

LETTER EXPLAINING PURPOSE OF ORG. & SPECIFIC USE OF GRANT. ATTACH COPY OF IRS EXEMPTION STATUS IF ORG. NOT IN PUB. 78.

ANY SUBMISSION DEADLINES

N/A

RESTRICTIONS AND LIMITATIONS ON AWARDS

PRIMARILY GIVEN TO ORG IN NORTHCENTRAL WI W/EMPHASIS ON YOUTH, EDUCATIONAL, CULTURAL PROG., & CIVIC/RELIGIOUS ACTIVITY.

| | AND CONTRIBUTIONS DURING THE YEAR | STATEMENT 11 | |
|--|--|------------------------------------|---------|
| RECIPIENT NAME AND ADDRESS | RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT | | AMOUNT |
| CAMP MANITO-WISH YMCA WAUSAU, WI | NONE GENERAL OPERATIONS | PUBLIC CHARITY | 500. |
| COMMUNITY FOUNDATION OF NORTH CENTRAL WISCONSIN WAUSAU, WI | NONE GENERAL OPERATIONS | PUBLIC CHARITY | 3,000. |
| LEIGH YAWKEY WOODSON ART MUSEUM WAUSAU, WI | NONE GENERAL OPERATIONS | PRIVATE OPERATING FOUNDATION | 1,100. |
| NATURAL RESOURCES FOUNDATION OF WISCONSIN MADISON, WI | NONE GENERAL OPERATIONS | PUBLIC CHARITY | 500. |
| PERFORMING ARTS FOUNDATION WAUSAU, WI | NONE GENERAL OPERATIONS | PUBLIC CHARITY | 1,000. |
| UNITED WAY OF MARATHON COUNTY WAUSAU, WI | NONE GENERAL OPERATIONS | PUBLIC CHARITY | 500. |
| WAUSAU YMCA FOUNDATION, INC. WAUSAU, WI | NONE CAMP STURTEVANT | PUBLIC CHARITY | 5,000. |
| GRAND THEATRE FOUNDATION WAUSAU, WI | NONE GENERAL OPERATIONS | PUBLIC CHARITY | 750. |
| TOTAL TO FORM 990-PF, PART XV, L | INE 3A | | 12,350. |