Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No. 1545-0052

2010

For calendar year 2010, or tax year beginning December 1 , 2010, and ending November 30 , 20 11

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Name of foundation: Robert C. and Susan M. Savage Family Foundation

A Employer identification number: 311488119

Number and street (or P.O. box number if mail is not delivered to street address): 4427 Talmadge Road | Room/suite:

B Telephone number (see page 10 of the instructions): 4194758665

City or town, state, and ZIP code: Toledo, Ohio 43623

C If exemption application is pending, check here ▶ ☐
D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐
E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

H Check type of organization: ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ $ 2,265,303

J Accounting method: ☑ Cash ☐ Accrual
☐ Other (specify)
(Part I, column (d) must be on cash basis.)

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 page 11 of the instructions).)*

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)				
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	63,449	63,449		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	214,915			
	b	Gross sales price for all assets on line 6a				
	7	Capital gain net income (from Part IV, line 2)		20,032		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	278,915	83,481		
Operating and Administrative Expenses	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 schedule)	483	483		483
	c	Other professional fees (attach schedule)	5,784	5,784		5,784
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions)	3,557	3,557		3,557
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	9,824	9,824		9,824
	25	Contributions, gifts, grants paid	79,550			
	26	**Total expenses and disbursements.** Add lines 24 and 25	89,374	9,824		9,824
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	188,990			
	b	**Net investment income** (if negative, enter -0-)		73,657		
	c	**Adjusted net income** (if negative, enter -0-)				

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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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	57,732	100,255	100,255
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		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 (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)	1,553,436	1,699,903	2,165,048
	11	Investments—land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	1,611,168	1,800,158	2,265,303
Liabilities	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 (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)			
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ 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			
	29	Retained earnings, accumulated income, endowment, or other funds	1,611,168	1,800,158	
	30	**Total net assets or fund balances** (see page 17 of the instructions)	1,611,168	1,800,158	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	1,611,168	1,800,158	

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	1,611,168
2	Enter amount from Part I, line 27a	2	188,990
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	1,800,158
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	1,800,158

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	See attached			
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) F.M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	20,032
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 pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8	3	

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 page 18 of 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 (col. (b) divided by col (c))
2009	79,506	1,900,454	.0418
2008	88,153	1,733,501	.0509
2007	107,890	2,072,673	.0521
2006	177,737	2,419,116	.073
2005	142,007	1,664,807	.0853

2	**Total** of line 1, column (d)	2	.3031
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	.0606
4	Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	2,257,501
5	Multiply line 4 by line 3	5	136,866
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	737
7	Add lines 5 and 6	7	137,602
8	Enter qualifying distributions from Part XII, line 4	8	89,374

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 on page 18.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

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% of Part I, line 27b	1	1,473
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2	3	1,473
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	1,473
6	Credits/Payments:		
a	2010 estimated tax payments and 2009 overpayment credited to 2010 — 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 ☐ 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	1,473
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be: **Credited to 2011 estimated tax ▶** **Refunded ▶**	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		✓
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		✓
	*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?	1c		✓
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.*	2		✓
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*	3		✓
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		✓
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		✓
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		✓
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?	6	✓	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV*	7	✓	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ ______			
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	✓	
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 2010 or the taxable year beginning in 2010 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		✓
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		✓

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

			Yes	No
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 page 20 of the instructions)	11		✓
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✓	
	Website address ▶			

14 The books are in care of ▶ Robert Savage Telephone no. ▶ 4194758665
Located at ▶ 4427 Talmadge Road ZIP+4 ▶ 43623

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041**—Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

			Yes	No
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		
	See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			

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

	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ 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)? ☐ Yes ☑ 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.) ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2010?	1c		✓
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? ☐ Yes ☐ No			
	If "Yes," list the years ▶ 20___, 20___, 20___, 20___			
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 page 22 of the instructions.)	2b		✓
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ 20___, 20___, 20___, 20___			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 2010 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 2010.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		✓
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 2010?	4b		✓

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 page 22 of the 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 page 22 of the instructions)? **5b**

Organizations relying on a current notice regarding disaster assistance check here . . . . . . ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? . . . . ☐ 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? . **6b**

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? . **7b**

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the 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
Robert Savage 3327 Talmadge	President <1 hr wk			
Susan Savage 4427 Talmadge	Secretary < 1 hr/wk			
Michelle Bissell 2709 Middlesex Toledo, OH 32606	Trustee < 1 hr/ wk			

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the 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				

Total number of other employees paid over $50,000 . . . . ▶

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

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
none.		
Total number of others receiving over $50,000 for professional services ▶		

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 none.	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments** (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 none.	
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3 ▶	

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	2,208,120
b	Average of monthly cash balances	1b	83,759
c	Fair market value of all other assets (see page 25 of the instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	2,291,879
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) . . . 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	34,378
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,257,501
6	**Minimum investment return.** Enter 5% of line 5	6	112,875

Part XI Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6			1	112,875
2a	Tax on investment income for 2010 from Part VI, line 5	2a	1,473		
b	Income tax for 2010. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	1,473
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	111,402
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	111,402
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	111,402

Part XII Qualifying Distributions (see page 25 of the 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	89,374
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	89,374
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 (see page 26 of the instructions)	5	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	89,374

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 page 26 of the instructions)

		(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1	Distributable amount for 2010 from Part XI, line 7				111,402
2	Undistributed income, if any, as of the end of 2010:				
a	Enter amount for 2009 only				
b	Total for prior years: 20___,20___,20___				
3	Excess distributions carryover, if any, to 2010:				
a	From 2005				
b	From 2006 106,493				
c	From 2007 4,256				
d	From 2008 1,478				
e	From 2009				
f	**Total** of lines 3a through e	112,227			
4	Qualifying distributions for 2010 from Part XII, line 4: ▶ $ 89,374				
a	Applied to 2009, but not more than line 2a				
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
d	Applied to 2010 distributable amount				89,374
e	Remaining amount distributed out of corpus				
5	Excess distributions carryover applied to 2010 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	22,028			
6	**Enter the net total of each column as indicated below:**				
a	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	90,199			
b	Prior years' undistributed income. Subtract line 4b from line 2b				
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				
d	Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions				
e	Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions				
f	Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8	Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions)				
9	**Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a				
10	Analysis of line 9:				
a	Excess from 2006 84,465				
b	Excess from 2007 4,256				
c	Excess from 2008 1,478				
d	Excess from 2009				
e	Excess from 2010				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2010, enter the date of the ruling . . . . . . ▶

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2010	(b) 2009	(c) 2008	(d) 2007	
2a Enter the lesser of the adjusted net income from Part I or the minimum 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					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
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 Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year—see page 28 of the 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 page 28 of the 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:

Robert C. Savage 4427 Talmadge Rd. Toledo, Ohio 43623 419-535-6633

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

written by mail

c Any submission deadlines:

none.

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

none.

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
a *Paid during the year*				
see attached				
Total ▶ 3a				
b *Approved for future payment*				
Total ▶ 3b				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a none.					
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					
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)					

13 **Total.** Add line 12, columns (b), (d), and (e) 13

(See worksheet in line 13 instructions on page 29 to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See page 29 of the instructions.)
	none.

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		✓
	(2) Other assets	1a(2)		✓
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		✓
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		✓
	(3) Rental of facilities, equipment, or other assets	1b(3)		✓
	(4) Reimbursement arrangements	1b(4)		✓
	(5) Loans or loan guarantees	1b(5)		✓
	(6) Performance of services or membership or fundraising solicitations	1b(6)		✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		✓

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☐ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

Michelle A Bissell | 4/11/12 | Trustee

Signature of officer or trustee | Date | Title

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
	Firm's name ▶			Firm's EIN ▶	
	Firm's address ▶			Phone no	

Robert C. and Susan M. Savage Family Foundation
Year Ended November 30, 2011
EIN 311488119
Part II Line 10b

	Prior Year	Current Year	
	Book value	Book Value	Fair Market Value
Investments			
Fort Washington PEI V	1,365,921	1,417,352	1,882,497
Fort Washington PEI V	138,946	209,871	209,871
Fort Wash. PEI Opportunities Fund II	48,569	72,680	72,680
	1,553,436	1,699,903	2,165,048

Part IV

2011 Tax Information Statement

Account Number: 19-8319
Recipient's Tax ID Number: XX-XXX8119
Payer's Federal ID Number: 31-1811281
Questions? (513)632-3035

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
ROBERT SAVAGE
2949 KENWOOD BLVD.
TOLEDO, OH 43606-3133

Payer's Name and Address:
U.S. BANK, N.A.
P. O. BOX 1118, ML CN-OH-W10X
CINCINNATI, OH 45201-1118

2011 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is Sales Price less commissions and option premiums.
For noncovered securites shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the Internal Revenue Service.

Cusip Number		Description	Date of Sale	Date of Acquisition	Sales Price of Stocks Bonds, etc.	Cost or Other Basis	Net Gain or Loss	Federal Income Tax Withheld
Noncovered *(Box 6 is checked)*		*(Box 9)*	*(Box 1a)*		*(Box 2)*			*(Box 4)*
Long Term 15% Sales Reported on 1099-B								
291011104	700.0000	EMERSON ELEC CO COM W/RTS ATTACHED EXP 11/01/2008	03/17/2011	Various	40,364.72	25,318.97	15,045.75	0.00
Total Long Term 15% Sales Reported on 1099-B **Report on Form 8949, Part II, with Box B checked**					**40,364.72**	**25,318.97**	**15,045.75**	**0.00**

FW PEI V 2,625
FW PEOpp II 2,361

20,032

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. For noncovered securities shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the Internal Revenue Service. The taxpayer is ultimately responsible for the accuracy of their own tax return.

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Part XV

GIFTS for 2011

Robert C. and Susan M. Savage Family Foundation
Year Ended November 30, 2011
EIN 311488119

Date	Organization Name	Amount	Address	Is recipient an individual?	Foundation Status	Purpose
6-Sep	Gesu School Phyllis and Eric match	100	2049 Parkside Blvd, Toledo 43607	no	501(c)3	general use
19-Nov	University of Toledo Foundation - athletics	1,500	PO Box 586, Toledo 43682-4000	no	501(c)3	general use
20-Nov	Notre Dame Academy - Bissell match	400	3535 West Sylvania Avenue, Toledo 43623	no	501(c)3	general use
20-Nov	St. Vincent de Paul Society	1,000	Gesu Church, 2045 Parkside Blvd, Toledo 43607	no	501(c)3	general use
20-Nov	St. Vincent Mercy Medical Foundation - NICU - Bissell match	350	2213 Cherry Street, Toledo 43608	no	501(c)3	general use
5-Jan	SFS - Eric and Phyllis Savage Scholarship Fund - E&P match 201(	2,000	2323 West Bancroft Street, Toledo 43607	no	501(c)3	general use
9-Jan	Gesu Church - Bissell match 2010	1,800	2049 Parkside Blvd., Toledo 43607	no	501(c)3	general use
11-Jan	Christ Child Society - Celebrity Wait Night	500	PO Box 352254, Toledo 43635	no	501(c)3	general use
11-Jan	The American College	1,500	270 S. Bryn Mawr Ave, Bryn Mawr, PA 19010	no	501(c)3	general use
27-Jan	Fellowship of Christian Athletes - Chet Trail	1,000	6657 Owens Lake Drive, Ste B, Walbridge 43465	no	501(c)3	general use
14-Feb	Christ Child Society - CWN - Bob match	150	PO Box 352254, Toledo 43635	no	501(c)3	general use
14-Feb	Toledo Symphony	400	PO Box 407, Toledo 43697-0407	no	501(c)3	general use
16-Feb	Junior Achievement of Northwestern Ohio - Kelli Hoff	100	2239 Cheyenne Blvd., Toledo 43614	no	501(c)3	general use
16-Feb	Schedel Arboretum and Gardens	5,000	PO Box 81, Elmore 43416	no	501(c)3	general use
16-Feb	Toledo Museum of Art - Pres.Council&Apollo Society	6,000	c/o Fifth Third Bank, PO Box 638148, Cincinnati 45263-8148	no	501(c)3	general use
22-Feb	GAMA Foundation	3,700	2901 Telestar Court, Ste 140, Falls Church, VA 22042	no	501(c)3	general use
8-Mar	Central City Ministry - Bissell match	125	1933 Spielbusch Ave., Toledo, Ohio 43604	no	501(c)3	general use
8-Mar	UT Foundation - UT Building Champions Fund	1,000	2801 West Bancroft Street, Toledo 43606	no	501(c)3	general use
15-Mar	MDRT Foundation	5,000	325 West Touhy Ave, Park Ridge, Illinois 60068-4265	no	501(c)3	general use
16-Mar	Family and Child Abuse Prevention Center	100	2460 Cherry Street, Toledo 43608	no	501(c)3	general use
16-Mar	Mercy College Foundation	200	2221 Madison Avenue, Toledo, Ohio 43604	no	501(c)3	general use
6-Apr	American Cancer Society - Making Strides - Kelly Savage	200	740 Commerce Drive, Suite B, Perrysburg 43551	no	501(c)3	general use
6-Apr	Imagination Station	1,000	1 Discovery Way, Toledo 43604-1579	no	501(c)3	general use
6-Apr	Sisters of Notre Dame - FamilyFest 2011	1,000	3837 Secor Road, Toledo 43623-4484	no	501(c)3	general use
9-Apr	Claire's Day	100	736 River Glen, Maumee 43537	no	501(c)3	general use
12-Apr	Toledo Symphony	200	PO Box 407, Toledo 43697-0407	no	501(c)3	general use
13-Apr	Christ Child Society - Sarah Catlett memorial [Purinton]	50	PO Box 352254, Toledo 43635	no	501(c)3	general use
19-Apr	Mary Immaculate School scholarships	3,000	3835 Secor Road, Toledo 43623	no	501(c)3	general use
25-Apr	Make A Wish - Phil Johnson	50	405 Madison Avenue, Suite 210, Toledo, Ohio 43604	no	501(c)3	general use
3-Jun	Annual Catholic Appeal	5,000	PO Box 917, Toledo 43697-0917	no	501(c)3	general use
3-Jun	Christ Child Society memorials - Smythe, Rutherford, Smigelski,	150	PO Box 352254, Toledo 43635-2254	no	501(c)3	general use
3-Jun	Library Legacy Foundation	500	325 Michigan Street, Toledo 43604	no	501(c)3	general use
3-Jun	Lourdes College - scholarship fund	1,000	6832 Convent Blvd, Sylvania 43560-2898	no	501(c)3	general use
3-Jun	University of Toledo Foundation - Women&Philanthropy	1,000	2801 West Bancroft St, MS 318, Toledo 43606-3390	no	501(c)3	general use
3-Jun	WGTE	1,000	1270 South Detroit Ave, PO Box 30, Toledo 43614	no	501(c)3	general use
7-Jul	Library Legacy Foundation	150	325 Michigan Street, Toledo 43604	no	501(c)3	general use
11-Jul	TCF - Science Society - matching Bob	1,250	300 Madison Ave. Suite 1300, Toledo, Ohio 43604	no	501(c)3	general use
11-Jul	Toledo Community Foundation - Science Society	15,000	300 Madison Ave. Suite 1300, Toledo, Ohio 43604	no	501(c)3	general use
21-Aug	Feed Lucas County Children	100	PO Box 9363, Toledo 43697-9363	no	501(c)3	general use
6-Sep	Gesu PTO - track a thon	500	2049 Parkside Blvd, Toledo 43607	no	501(c)3	general use
6-Sep	Gesu PTO - track a thon Bissell match	150	2049 Parkside Blvd, Toledo 43607	no	501(c)3	general use
18-Sep	Komen NW Ohio Race for the Cure	100	3100 W. Central Ave., Suite 235, Toledo, Ohio 43606	no	501(c)3	general use
18-Sep	Library Legacy Foundation - Labor History Room	50	325 Michigan Street, Toledo 43604	no	501(c)3	general use
22-Sep	Christ Child Society - Huffer memorial	25	PO Box 352254, Toledo 43635-2254	no	501(c)3	general use
29-Sep	National Hospice Foundation - Kelly Desch	100	1731 King Street, Suite 200, Alexandria, Virginia 22314	no	501(c)3	general use
12-Oct	Toledo Lucas County CareNet	1,000	3231 Central Park West Drive, Suite 200, Toledo 43617	no	501(c)3	general use
28-Oct	Alzheimer's Association NWOhio Chapter - Beth Wong	50	2500 North Reynolds Road, Toledo, Ohio 43615	no	501(c)3	general use

7-Nov	Downtown Coaches Association	100	2801 W. Bancroft, Toledo 43606	no	501(c)3	general use
7-Nov	St. Patrick of Heatherdowns Capital Campaign - Ohlinger match	200	4201 Heatherdowns Blvd, Toledo 43614	no	501(c)3	general use
14-Nov	Gesu - St. Vincent de Paul - Bissell match	100	2049 Parkside Blvd, Toledo 43607	no	501(c)3	general use
18-Nov	Notre Dame Academy - Bissell match	400	3535 West Sylvania Avenue, Toledo 43623	no	501(c)3	general use
29-Nov	Notre Dame Academy - Christy	200	3535 West Sylvania Avenue, Toledo 43623	no	501(c)3	general use
11-Dec	Schedel Arboretum and Gardens	500	PO Box 81, Elmore, OH 43416	no	501(c)3	general use
11-Dec	Sisters of Notre Dame - Partnership for Mission	500	3837 Secor Road, Toledo 43623-4484	no	501(c)3	general use
11-Dec	The Library Legacy Foundation	1,500	325 Michigan Street, Toledo 43604	no	501(c)3	general use
11-Dec	The National Christ Child Society, Inc	50	4340 East West Highway, Suite 202, Bethesda, MD 20814	no	501(c)3	general use
11-Dec	The Ohio State University Foundation	100	Office of University Development, PO Box 710811, Columbus, OH 43	no	501(c)3	general use
11-Dec	Toledo Zoo	250	2700 Broadway, PO Box 140130, Toledo 43614-9888	no	501(c)3	general use
12-Dec	Black Swamp Conservancy	200	PO Box 332, Perrysburg 43552-0332	no	501(c)3	general use
12-Dec	CYO Athletics	500	1933 Spielbusch Avenue, Toledo 43604	no	501(c)3	general use
12-Dec	Hospice of Northwest Ohio	500	30000 East River Road, Perrysburg, OH 43551-3429	no	501(c)3	general use
12-Dec	Old Newsboys Goodfellow Association	100	PO Box 2032, Toledo 43604	no	501(c)3	general use
12-Dec	Sauder Village	100	PO Box 235, Arachbold, OH 43502	no	501(c)3	general use
13-Dec	American Red Cross	200	PO Box 595, Toledo 43697-0595	no	501(c)3	general use
13-Dec	Arts Commission of Greater Toledo	200	1838 Parkwood Avenue, Suite 120, Toledo 43604-7925	no	501(c)3	general use
13-Dec	Bishop Watterson High School	500	99 East Cooke Road, Columbus 43214	no	501(c)3	general use
13-Dec	Bowling Green State University Foundation, Inc - Trustees Lead	500	Mileti Alumni Center, Bowling Green, 43403	no	501(c)3	general use
13-Dec	Cherry Street Mission Ministries	1,000	105 17th Street, Toledo 43604	no	501(c)3	general use
13-Dec	Christ Child Society of Toledo - letter appeal	2,000	PO Box 352254, Toledo 43635	no	501(c)3	general use
13-Dec	Kids Unlimited, Inc	500	8927 Royal Oak Drive, Holland, OH 43528	no	501(c)3	general use
13-Dec	Lourdes College	500	6832 Convent Boulevard, Sylvania 43560	no	501(c)3	general use
13-Dec	Mom's House	100	2505 Franklin Avenue, Toledo 43610	no	501(c)3	general use
13-Dec	Notre Dame Academy	1,000	3535 West Sylvania Avenue, Toledo 43623	no	501(c)3	general use
13-Dec	Our Lady of Toledo Shrine	100	633 Coy Road, Toledo 43516	no	501(c)3	general use
13-Dec	Read For Literacy	1,000	325 North Michigan Street, Toledo 43604	no	501(c)3	general use
13-Dec	St. Patrick of Heatherdowns - Ohlinger match	1,200	4201 Heatherdowns Blvd., Toledo 43614	no	501(c)3	general use
13-Dec	Toledo Botanical Gardens	100	5403 Elmer Drive, Toledo 43615	no	501(c)3	general use
13-Dec	Toledo School for the Arts	300	333 14th Street, Toledo 43604	no	501(c)3	general use
15-Dec	University of Toledo Foundation - insurance - 2 years	300	2801 West Bancroft Street, Toledo 43606	no	501(c)3	general use
23-Dec	Cherry Street Mission Ministries - Bissell match	100	105 17th Street, Toledo 43604	no	501(c)3	general use
		79,550				