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Form 990-PF

Department of the Treasury
Internal Revenue ServiceReturn 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

2012

Open to public inspection

For calendar year 2012 or tax year beginning

, and ending

Name of foundation ALINE UNDERHILL ORTEN FOUNDATION, INC.		A Employer identification number 72-1477797
Number and street (or P.O. box number if mail is not delivered to street address) ENERGY CENTER, 1100 POYDRAS ST.	Room/suite 3100	B Telephone number 586-838-2128
City or town, state, and ZIP code NEW ORLEANS, LA 70103		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization. <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 2,958,878. (Part I, column (d) must be on cash basis.)	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		59,698.	59,698.		STATEMENT 1
4 Dividends and interest from securities		92,728.	92,728.		STATEMENT 2
5a Gross rents					
b Net rental income (or loss)					
6a Net gain (or loss) from sale of assets not on line 10		35,532.			
b Gross sales price for all assets on line 6a		278,053.			
7 Capital gain net income (from Part IV, line 2)			35,532.		
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)					
11 Other income		1,878.	1,878.		STATEMENT 3
12 Total. Add lines 1 through 11		189,836.	189,836.		
13 Compensation of officers, directors, trustees, etc.		102,000.	51,000.		51,000.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees STMT 4		2,127.	0.		0.
b Accounting fees STMT 5		9,238.	0.		0.
c Other professional fees STMT 6		2,900.	0.		0.
17 Interest		2,764.	2,764.		0.
18 Taxes STMT 7		16,592.	784.		0.
19 Depreciation and depletion		391.	391.		
20 Occupancy					
21 Travel, conferences, and meetings		315.	0.		0.
22 Printing and publications					
23 Other expenses STMT 8		25,493.	2,317.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		161,820.	57,256.		51,000.
25 Contributions, gifts, grants paid		164,000.			164,000.
26 Total expenses and disbursements. Add lines 24 and 25		325,820.	57,256.		215,000.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-135,984.			
b Net investment income (if negative, enter -0-)			132,580.		
c Adjusted net income (if negative, enter -0-)				N/A	

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LHA For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2012)

SCANNED JUN 11 2013

852 Revenue

Operating and Administrative Expenses

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	204,135.	67,567.	67,567.
	3 Accounts receivable			
	Less allowance for doubtful accounts			
	4 Pledges receivable			
	Less allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable			
	Less allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis				
Less accumulated depreciation				
12 Investments - mortgage loans				
13 Investments - other	STMT 9 2,184,761.	2,185,297.	2,891,311.	
14 Land, buildings, and equipment basis	15,757.			
Less accumulated depreciation	STMT 10 15,757.			
15 Other assets (describe)				
16 Total assets (to be completed by all filers)		2,388,896.	2,252,864.	2,958,878.
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			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)		0.	0.
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	0.	0.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	2,388,896.	2,252,864.	
	30 Total net assets or fund balances		2,388,896.	2,252,864.
31 Total liabilities and net assets/fund balances		2,388,896.	2,252,864.	

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	2,388,896.
2 Enter amount from Part I, line 27a	2	-135,984.
3 Other increases not included in line 2 (itemize)	3	0.
4 Add lines 1, 2, and 3	4	2,252,912.
5 Decreases not included in line 2 (itemize) NONDEDUCTIBLE EXPENSES OF PTP	5	48.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,252,864.

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			
b SEE ATTACHED STATEMENTS			
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 278,053.		242,521.	35,532.

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

(i) FMV 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			35,532.

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	35,532.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2011	192,373.	2,888,594.	.066597
2010	148,026.	2,756,824.	.053694
2009	130,721.	2,236,827.	.058440
2008	169,869.	2,738,074.	.062040
2007	185,976.	3,545,226.	.052458

2 Total of line 1, column (d)	2	.293229
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	.058646
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	2,947,775.
5 Multiply line 4 by line 3	5	172,875.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,326.
7 Add lines 5 and 6	7	174,201.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions.	8	215,000.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		1	1,326.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		3	1,326.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
3 Add lines 1 and 2		5	1,326.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		6a	3,540.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		6b	
6 Credits/Payments		6c	
a 2012 estimated tax payments and 2011 overpayment credited to 2012		6d	
b Exempt foreign organizations - tax withheld at source		7	3,540.
c Tax paid with application for extension of time to file (Form 8868)		8	
d Backup withholding erroneously withheld		9	
7 Total credits and payments Add lines 6a through 6d		10	2,214.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached		11	0.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be Credited to 2013 estimated tax			

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year? ... N/A		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> LA		
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 SEE STATEMENT 11		X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► JOYCE A. ROEHL Telephone no ► 586-838-2128 Located at ► 35745 BEATTIE DRIVE, STERLING HEIGHTS, MI ZIP+4 ► 48312			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A			
16	At any time during calendar year 2012, 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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country ►	16	Yes	No X

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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b 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 instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	X
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 2012?	1c	X
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 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ►		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions) N/A	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 ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2012 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 2012.) N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
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 2012?	4b	X

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

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

X

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

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 12		102,000.	0.	0.

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

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

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

0

Part VIII**Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3** Five highest-paid independent contractors for professional services. 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		0

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 CHARITABLE DONATIONS TO 39 CHARITABLE ORGANIZATIONS	
	0.
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 and 2

	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	2,916,185.
b	Average of monthly cash balances	1b	76,480.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	2,992,665.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	2,992,665.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	44,890.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	2,947,775.
6	Minimum investment return. Enter 5% of line 5	6	147,389.

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

1	Minimum investment return from Part X, line 6	1	147,389.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	1,326.
b	Income tax for 2012 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	1,326.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	146,063.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	146,063.
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	146,063.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	215,000.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	215,000.
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	1,326.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	213,674.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				146,063.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2012.				
a From 2007				
b From 2008				
c From 2009				
d From 2010				
e From 2011				6,156.
f Total of lines 3a through e	6,156.			
4 Qualifying distributions for 2012 from Part XII, line 4: ▶ \$ 215,000.				
a Applied to 2011, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2012 distributable amount				146,063.
e Remaining amount distributed out of corpus	68,937.			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e. Subtract line 5	75,093.			
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 2011 Subtract line 4a from line 2a. Taxable amount - see instr			0.	
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	75,093.			
10 Analysis of line 9				
a Excess from 2008				
b Excess from 2009				
c Excess from 2010				
d Excess from 2011				6,156.
e Excess from 2012				68,937.

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

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2012, 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)

2 a 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

Tax year

(a) 2012

(b) 2011

Prior 3 years

(c) 2010

(d) 2009

(e) Total

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 instructions.)**1 Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE

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

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

a The name, address, and telephone number or e-mail of the person to whom applications should be addressed.

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

c Any submission deadlines:

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

Part XV **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
SEE ATTACHED STATEMENT				164,000.
Total			3a	164,000.
b <i>Approved for future payment</i>				
NONE				
Total			3b	0.

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e)
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		Related or exempt function income
1 Program service revenue:						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments			14	59,698.		
4 Dividends and interest from securities			14	92,728.		
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						1,878.
8 Gain or (loss) from sales of assets other than inventory			18	35,532.		
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)		0.		187,958.		1,878.
13 Total. Add line 12, columns (b), (d), and (e)						189,836.

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

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).

[illegible]

ALINE UNDERHILL ORTEN FOUNDATION, INC.

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	SUBURBAN PROPANE PARTNERS	P		
b	DUKE ENERGY CORP CASH IN LIEU	P	VARIOUS	07/11/12
c	SOUTHERN COPPER CORP CASH IN LIEU	P	VARIOUS	02/28/12
d	1000 SHS CITIZENS REPUBLIC BANCORP INC	P	VARIOUS	09/21/12
e	1000 SHS GENERAL ELECTRIC CO	P	02/17/11	09/07/12
f	2000 SHS CITIGROUP CAP XX TRUPS 7.87% 67	P	VARIOUS	12/17/12
g	2000 SHS DELPHI FINL GROUP INC JR SUB DEB 7.376%	P	VARIOUS	05/10/12
h	3000 SHS DIVIDEND OPPORTUNITY TRUST CASH DUE 5/29	P	02/25/11	06/01/12
i	1000 SHS NATIONAL CITY CAP TR III PFD SEC 6.625%	P	05/21/07	05/25/12
j	1000 SHS PREFERRED PLUS TR FRD-1 TR 7.4%	P	12/22/09	11/01/12
k	2000 SHS SUSQUEHANNA CAP I PFD 9.37% SER 1	P	12/05/07	09/18/12
l	KKR FINANCIAL HOLDINGS, LLC	P		
m	4 SHS DNP SELECT INCOME FD RIGHTS	P	08/30/12	10/09/12
n	CAPITAL GAINS DIVIDENDS			
o				

(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 39.			39.
b 44.			44.
c 11.			11.
d 20,035.		9,124.	10,911.
e 21,281.		21,580.	-299.
f 50,000.		46,210.	3,790.
g 49,301.		42,602.	6,699.
h 31,287.		30,000.	1,287.
i 25,000.		25,000.	0.
j 25,000.		18,005.	6,995.
k 50,000.		50,000.	0.
l 1,779.			1,779.
m			0.
n 4,276.			4,276.
o			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			39.
b			44.
c			11.
d			10,911.
e			-299.
f			3,790.
g			6,699.
h			1,287.
i			0.
j			6,995.
k			0.
l			1,779.
m			0.
n			4,276.
o			

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	35,532.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8	3	N/A

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

<u>SOURCE</u>	<u>AMOUNT</u>
IBERIA BANK	23.
KKR FINANCIAL HOLDINGS ,LLC	7,424.
OPPENHEIMER	52,250.
OPPENHEIMER ACCR. INT. ADJ.	-20.
SUBURBAN PROPANE PARTNERS	21.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	59,698.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

<u>SOURCE</u>	<u>GROSS AMOUNT</u>	<u>CAPITAL GAINS DIVIDENDS</u>	<u>COLUMN (A) AMOUNT</u>
KKR FINANCIAL HOLDINGS ,LLC	354.	0.	354.
OPPENHEIMER	96,649.	4,276.	92,373.
SUBURBAN PROPANE PARTNERS	1.	0.	1.
TOTAL TO FM 990-PF, PART I, LN 4	97,004.	4,276.	92,728.

FORM 990-PF OTHER INCOME STATEMENT 3

<u>DESCRIPTION</u>	<u>(A) REVENUE PER BOOKS</u>	<u>(B) NET INVEST- MENT INCOME</u>	<u>(C) ADJUSTED NET INCOME</u>
SUBURBAN PROPANE PARTERS ORD BUSINESS INCOME	1,345.	1,345.	
KKR FINANCIAL HOLDINGS, LLC ORDINARY INCOME	533.	533.	
TOTAL TO FORM 990-PF, PART I, LINE 11	1,878.	1,878.	

FORM 990-PF	LEGAL FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	2,127.	0.		0.
TO FM 990-PF, PG 1, LN 16A	2,127.	0.		0.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	9,238.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	9,238.	0.		0.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CONSULTING	2,900.	0.		0.
TO FORM 990-PF, PG 1, LN 16C	2,900.	0.		0.

FORM 990-PF	TAXES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
990-PF	7,715.	0.		0.
FOREIGN TAXES PAID	784.	784.		0.
PAYROLL TAXES	8,093.	0.		0.
TO FORM 990-PF, PG 1, LN 18	16,592.	784.		0.

FORM 990-PF	OTHER EXPENSES			STATEMENT	8
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
TELEPHONE	4,538.	0.		0.	
OFFICE SUPPLIES	1,053.	0.		0.	
OFFICE EXPENSE	4,457.	0.		0.	
INSURANCE	567.	0.		0.	
POSTAGE & DELIVERY	99.	0.		0.	
INVESTMENT EXPENSE	41.	0.		0.	
ADMINISTRATIVE EXPENSES	12,000.	0.		0.	
BANK FEES	35.	0.		0.	
MISCELLANEOUS	386.	0.		0.	
OTHER EXPENSES FROM KKR FINANCIAL HOLDINGS	2,317.	2,317.		0.	
TO FORM 990-PF, PG 1, LN 23	25,493.	2,317.		0.	

FORM 990-PF	OTHER INVESTMENTS		STATEMENT	9
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
OPPENHEIMER	COST	2,185,297.	2,891,311.	
TOTAL TO FORM 990-PF, PART II, LINE 13		2,185,297.	2,891,311.	

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT		STATEMENT	10
DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE	
COPY EQUIPMENT	4,716.	4,716.	0.	
COPY EQUIPMENT	8,502.	8,502.	0.	
COMPUTER	2,539.	2,539.	0.	
TOTAL TO FM 990-PF, PART II, LN 14	15,757.	15,757.	0.	

FORM 990-PF	EXPLANATION CONCERNING PART VII-A, LINE 8B	STATEMENT 11
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EXPLANATION

THE STATE OF LOUISIANA DOES NOT REQUIRE A FILED COPY.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT 12
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JOYCE A. ROEHL 419 MAISON GROSSE POINTE FARMS, MI 48236	PRESIDENT/DIRECTOR 40.00	64,000.	0.	0.
DAVID M. KENNY 81 FORDCROFT GROSS POINTE SHORES, MI 48236	DIRECTOR 0.25	4,000.	0.	0.
MICHELE ANN WORDEN 6877 GALVIN ROAD TRAVERSE CITY, MI 49684	SEC/TREAS/DIRECTOR 12.00	26,000.	0.	0.
KATHLEEN ROEHL 41020 VISTA WOODS WAY CLINTON TOWNSHIP, MI 48038	VP/DIRECTOR 0.25	4,000.	0.	0.
WILLIAM ROETHEL 5017 LAKE BLUFF ROAD W. BLOOMFIELD, MI 48323	DIRECTOR 0.25	4,000.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		102,000.	0.	0.

2012 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	C o n v	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
1	COPY EQUIPMENT	12/31/00	200DB	5.00		HY17	4,716.		4,716.					0.	
2	COPY EQUIPMENT	01/15/01	200DB	5.00		HY17	8,502.		8,502.					0.	
3	COMPUTER	08/28/02	200DB	5.00		HY17	2,539.		2,539.					0.	
	* TOTAL 990-PF PG 1 DEPR						15,757.		15,757.		0.	0.		0.	0.

SCHEDULE A

HISTORY OF DONATIONS 2012

CATEGORY	NAME	DATE	2012	PURPOSE
Animal Welfare	Detroit Zoological Society 8450 W. 10 Mile Road Royal Oak, MI 48067	10/8/2012	\$4,800	A non-profit that operates the Detroit Zoo and the Belle Isle Nature Zoo
Animal Welfare	Grosse Pointe Animal Adoption Society 296 Chalfonte Ave Grosse Pointe Farms, MI 48236	3/20/2012	\$2,000	A foster-home based, non-euthanasia organization that find suitable homes for indoor companion animals who have been a abandoned or found.
Animal Welfare	Grosse Pointe Animal Adoption Society	4/20/2012	\$1,000	
Animal Welfare	Humane Society of Sarasota County 2331 15th Street Sarasota, FL 34237	2/21/2012	\$2,000	Provides care and shelter to abandoned pets
Animal Welfare	Humane Society of Sarasota County	6/7/2012	\$2,500	Provides care and shelter to abandoned pets
Animal Welfare	Humane Society of Sarasota County	10/31/2012	\$2,500	Provides care and shelter to abandoned pets
Animal Welfare	Leader Dogs for the Blind P.O. Box 5000 Rochester MI 589308-5000	6/8/2012	\$1,500	Provides the means for safe and independent travel of the visually impaired
Animal Welfare	Leader Dogs for the Blind	8/22/2012	\$1,500	
Arts	Belle Isle Conservancy 8109 E. Jefferson Ave. Detroit, MI 48214	6/1/2012	\$1,000	Promotes the preservation of natural beauty, restoration and preservation of Belle Isle
Arts	Grosse Pointe Art Center 15001 Kercheval	4/13/2012	\$4,500	Promotes artists and art appreciation.
Arts	Grosse Pointe Park, MI 48230			
Arts	Macomb Symphony Orchestra 44575 Garfield Clinton Township, MI 48038	10/26/2012	\$1,000	Provides concerts, youth education presentations and chamber music ensembles to the community.
Arts	Michigan Legacy Art Park 12500 Crystal Mountain Drive Thompsonville, MI 49683	11/3/2012	\$1,000	Sculpture art park reflecting Michigan history
Arts	Northwest Michigan Ballet Theatre 869 Robinwood Court Traverse City, MI 49686	6/5/2012	\$1,500	Provides performance opportunities for dancers and arts education for regional audiences
Community	Alzheimer's Association Greater Michigan Chapter 17220 W.12 Mile Road Suite 100 Southfield, Michigan 48076	8/2/2012	\$1,000	Provides services for Alzheimer's patients and families

SCHEDULE A

HISTORY OF DONATIONS 2012

CATEGORY	NAME	DATE	2012	PURPOSE
Community	Capuchin Soup Kitchen 1820 Mt Elliott Avenue Detroit, MI 48207-3496	10/23/2012	\$2,200	Meals for the needy
Community	Catholic Charities Diocese of Venice PO Box 2116 Venice, FL 34284	3/27/2012	\$1,000	For Bethesda House food pantry
Community	Catholic Charities Diocese of Venice PO Box 2116 Venice, FL 34284	8/27/2012	\$2,000	For Our Mother's House
Community	Community Mobile Meals of Sarasota County 421 N Lime Ave Sarasota, FL 34237	8/7/2012	\$2,000	Provides need-based hot meals for seniors and disabled adults
Community	Crossroads 4800 Woodward Avenue Detroit, MI 48201	10/26/2012	\$1,000	Program to assist young mothers and children
Community	Food Bank of Northwest Louisiana	12/17/2012	\$2,000	Provides senior food boxes
Community	Focus Hope 1355 Oakman Blvd. Detroit, MI 48238			Commodity Supplemental Food Program and Senior Food Program
Community	Forgotten Harvest 21800 Greenfield Road Oak Park, MI 48237	7/25/2012	\$2,000	Rescues surplus prepared and perishable food and donates it to emergency food providers
Community	Gleaners Community Food Bank 2131 Beaufait Detroit, MI 48207	7/25/2012	\$2,000	Food procurement, storage and distribution to agencies that feed the needy.
Community	Gleaners Community Food Bank	10/17/2012	\$1,500	Student Backpack Program
Community	Goodwill Industries of North Louisiana	12/17/2012	\$2,000	Youth Employment Services
Community	Goodwill Industries of Northern MI	3/20/2012	\$2,000	Food rescue program
Community	Goodwill Industries of Northern MI	3/27/2012	\$2,000	Homeless Shelter
Community	Goodwill Industries of Northern MI	8/2/2012	\$2,000	Food rescue program
Community	Grosse Pointe Farms Foundation 90 Kerby Road Grosse Pointe Farms, MI 48236		\$30,000	For building new pavilion/warming building at the Pier Park.
Community	Macomb County Interfaith Volunteer Caregivers 31654 Mound Road Warren, MI 48092	2/2/2012	\$2,000	Provides volunteer services to older adults and the disabled to enable them to remain in their homes

SCHEDULE A

HISTORY OF DONATIONS 2012

CATEGORY	NAME	DATE	2012	PURPOSE
Community	Macomb County Interfaith Volunteer Caregivers	10/17/2012	\$1,000	Provides volunteer services to older adults and the disabled to enable them to remain in their homes.
Community	Michigan Land Use Institute 148 E Front Street-Suite 301 Traverse City, MI 49684	8/14/2012	\$3,000	Promotes kids healthy eating habits by working with farm/schools efforts, curriculum, school garden, cafeteria assistance
Community	Salvation Army Matts Homeless Shelter 16130 Northland Dr. Southfield, MI 48075	2/2/2012	\$2,000	Supports Matts Homeless Shelter
Community	Salvation Army-Sarasota County PO Box 2792 Sarasota, FL 34230	8/27/2012	\$3,500	Families in Transitional Housing Program
Community	Senior Friendship Center 1888 Brother Geenen Way Sarasota, FL 34236	3/27/2012	\$2,000	Provides home delivered meals to seniors.
Community	Senior Friendship Center Services for Older Citizens Meals on Wheels Program 159 Kercheval Avenew Grosse Pointe, MI 48230	6/14/2012 4/20/2012	\$2,000 \$2,000	Provides home delivered meals to seniors. To provide meals for older citizens who are in need
Community	Services for Older Citizens Meals on Wheels Program	10/23/2012	\$2,000	To provide meals for older citizens who are in need
Community	ShelterBox USA 8374 Market St #203 Lakewood Ranch, FL 34202	8/16/2012	\$1,000	Provides aid to disaster victims in the form of boxes containing a tent, cooking equipment, sleeping bags, etc.
Education	Arab American Scholarship Foundation 4337 Maple Street Dearborn, MI 48126	4/11/2012	\$1,500	Provides scholarships for needy and academically qualified students seeking higher education
Education	Center for the Education of Women- University of Michigan 330 E Liberty Ann Arbor MI 48104-2289	8/24/2012	\$5,000	Scholarships for women studing science
Education	Grand Traverse Area Children's Garden 505 Riverine Traverse City, MI 49684	4/11/2012	\$500	Nutritional programs and educational booklets

SCHEDULE A

HISTORY OF DONATIONS 2012

CATEGORY	NAME	DATE	2012	PURPOSE
Education	Greenspire School 1026 RedDrive Traverse City, MI 49684	11/6/2012	\$25,000	To provide an ecologically relevant and academically rigorous educational program
Education	Winning Futures 27500 Cosgrove Warren, MI 48092	6/5/2012	\$2,000	
Medical	Arthritis Foundation MI Chapter 17117 W. Nine Mile-Suite 950 Southfield, MI 48075-4508	6/8/2012	\$2,000	To combat Arthritis
Medical	Alzheimer's Association Greater Michigan Chapter 17220 W.12 Mile Road Suite 100 Southfield, Michigan 48076	7/30/2012	\$1,000	Provides services for Alzheimer's patients and families
Medical	Juvenile Diabetes Research Foundation 120 Wall Street - 19th Floor New York, NY 10005	8/22/2012	\$1,000	Research for cure of juvenile diabetes
Medical	Henry Ford Macomb Hospital	3/15/2012	\$2,000	Free medical clinics for financially needy
Medical	Henry Ford Macomb Hospital	8/14/2012	\$2,000	Free medical clinics for financially needy
Medical	Henry Ford Macomb Hospital	10/26/2012	\$1,500	Free medical clinics for financially needy
Medical	St John Hospital Foundation 22101 Moross Road Mack Office Building Suite 102 detroit, MI 48236	10/8/2012	\$10,000	Nephrology research
Medical	Traverse Health Clinic 3155 Logan Valley Rd. Traverse City, MI 49684	3/16/2012	\$2,000	Medical clinic-uninsured or under-insured
Medical	Traverse Health Clinic	6/14/2012	\$3,000	Medical clinic
Medical	Traverse Health Clinic			CHAPS Dental Access Program
Medical	Traverse Health Clinic	8/8/2012	\$2,000	Free medical clinics for financially needy
Medical	Traverse Health Clinic	10/9/2012	\$1,500	Free medical clinics for financially needy
			\$164,000	TOTAL

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file) You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on **e-file for Charities & Nonprofits**.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions.	Employer identification number (EIN) or
	ALINE UNDERHILL ORTEN FOUNDATION, INC.	72-1477797
	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
	ENERGY CENTER, 1100 POYDRAS ST., NO. 3100	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	NEW ORLEANS, LA 70103	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

JOYCE A. ROEHL

- The books are in the care of ► **35745 BEATTIE DRIVE - STERLING HEIGHTS, MI 48312**
Telephone No. ► **586-838-2128** FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box ☐ . If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 1** I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2013**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
► ☒ calendar year **2012** or
► ☐ tax year beginning , and ending .

- 2** If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return
☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	1,353.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	3,540.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev. 1-2013)