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Form **990-PF**Department of the Treasury  
Internal Revenue Service**Return of Private Foundation**

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

▶ Do not enter Social Security numbers on this form as it may be made public.

▶ Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

OMB No 1545-0052

**2013**

Open to Public Inspection

For calendar year 2013 or tax year beginning 09-30

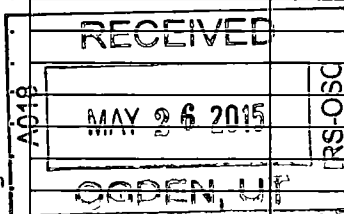
, 2013, and ending 09-28

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Name of foundation <b>MERITOR, INC. TRUST (FKA ARVINMERITOR, INC. TRUST)</b>		<b>A</b> Employer identification number 52-2089611
Number and street (or P O box number if mail is not delivered to street address) <b>2135 W. MAPLE ROAD</b>		<b>B</b> Telephone number (see instructions) 248-435-1000
City or town, state or province, country, and ZIP or foreign postal code <b>TROY, MI 48084</b>		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>
<b>G</b> 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
<b>H</b> Check type of organization: <input type="checkbox"/> Section 501(c)(3) exempt private foundation		<b>D</b> 1. Foreign organizations, check here <input type="checkbox"/>
<input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <b>262,591.00</b>		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
<b>J</b> Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)		981,649.00			
<b>2</b> Check <input type="checkbox"/> if the foundation is not required to attach Sch. B					
<b>3</b> Interest on savings and temporary cash investments					
<b>4</b> Dividends and interest from securities		15.15	15.15	15.15	
<b>5a</b> Gross rents					
<b>b</b> Net rental income or (loss)					
<b>6a</b> Net gain or (loss) from sale of assets not on line 10					
<b>b</b> Gross sales price for all assets on line 6a					
<b>7</b> Capital gain net income (from Part IV, line 2)					
<b>8</b> Net short-term capital gain					
<b>9</b> Income modifications					
<b>10a</b> Gross sales less returns and allowances					
<b>b</b> Less Cost of goods sold					
<b>c</b> Gross profit or (loss) (attach schedule)					
<b>11</b> Other income (attach schedule)					
<b>12</b> Total. Add lines 1 through 11		981,664.15	15.15	15.15	
<b>13</b> Compensation of officers, directors, trustees, etc.					
<b>14</b> Other employee salaries and wages					
<b>15</b> Pension plans, employee benefits					
<b>16a</b> Legal fees (attach schedule)					
<b>b</b> Accounting fees (attach schedule)					
<b>c</b> Other professional fees (attach schedule)					
<b>17</b> Interest					
<b>18</b> Taxes (attach schedule) (see instructions)					
<b>19</b> Depreciation (attach schedule) and depletion					
<b>20</b> Occupancy					
<b>21</b> Travel, conferences, and meetings					
<b>22</b> Printing and publications					
<b>23</b> Other expenses (attach schedule)					
<b>24</b> Total operating and administrative expenses. Add lines 13 through 23					
<b>25</b> Contributions, gifts, grants paid		981,649.00			981,649.00
<b>26</b> Total expenses and disbursements. Add lines 24 and 25		981,649.00			981,649.00
<b>27</b> Subtract line 26 from line 12					
<b>a</b> Excess of revenue over expenses and disbursements		15.15			
<b>b</b> Net investment income (if negative, enter -0-)			15.15		
<b>c</b> Adjusted net income (if negative, enter -0-)				15.15	

SCANNED MAY 28 2015



<b>Part II Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1	Cash - non-interest-bearing . . . . .		262,575.00	262,591.00	262,591.00
	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 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 . . . . .				
	10 a	Investments - U.S. and state government obligations (attach schedule) . . . . .				
	b	Investments - corporate stock (attach schedule) . . . . .				
	c	Investments - corporate bonds (attach schedule) . . . . .				
	<b>Liabilities</b>	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		<b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item I) . . . . .		262,575.00	262,591.00	262,591.00
<b>Net Assets or Fund Balances</b>	17	Accounts payable and accrued expenses . . . . .				
	18	Grants payable . . . . .				
	19	Deferred revenue . . . . .				
	20	Loans from officers, directors, trustees, and other disqualified persons . . . . .				
	21	Mortgages and other notes payable (attach schedule) . . . . .				
	22	Other liabilities (describe ▶ . . . . .)				
23	<b>Total liabilities</b> (add lines 17 through 22) . . . . .					
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted . . . . .				
	25	Temporarily restricted . . . . .				
	26	Permanently restricted . . . . .				
	Foundations that do not follow SFAS 117, . . . ▶ <input type="checkbox"/> check here and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds . . . . .	262,575.00	262,591.00		
	28	Paid-in or capital surplus, or land, bldg, and equipment fund . . . . .				
	29	Retained earnings, accumulated income, endowment, or other funds . . . . .				
	30	<b>Total net assets or fund balances</b> (see instructions) . . . . .	262,575.00	262,591.00		
	31	<b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	262,575.00	262,591.00		

**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	262,575.00
2	Enter amount from Part I, line 27a . . . . .	2	15.15
3	Other increases not included in line 2 (itemize) ▶ . . . . .	3	
4	Add lines 1, 2, and 3 . . . . .	4	262,590.15
5	Decreases not included in line 2 (itemize) ▶ . . . . .	5	
6	<b>Total net assets or fund balances at end of year</b> (line 4 minus line 5) - Part II, column (b), line 30 . . . . .	6	262,590.15

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)			(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
(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)		
<b>a</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(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			
<b>a</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
<b>2</b> Capital gain net income or (net capital loss) <span style="float:right">{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }</span>			<b>2</b>		
<b>3</b> 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 instructions) If (loss), enter -0- in Part I, line 8			<b>3</b>		

**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))
2012	348,720.00	261,043.76	1.3359
2011	336,601.00	253,931.90	1.3256
2010	289,229.00	247,153.00	1.1702
2009	298,360.00	247,806.00	1.2040
2008	320,888.00	238,197.00	1.3472
<b>2</b> Total of line 1, column (d)			<b>2</b> 6.3829
<b>3</b> 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			<b>3</b> 1.2766
<b>4</b> Enter the net value of noncharitable-use assets for 2013 from Part X, line 5			<b>4</b> 255,637.05
<b>5</b> Multiply line 4 by line 3			<b>5</b> 326,346.26
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)			<b>6</b> 0.15
<b>7</b> Add lines 5 and 6			<b>7</b> 326,346.41
<b>8</b> 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.			<b>8</b> 981,649.00

**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)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b . . . . .	1	1.00
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	1.00
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- . . . . .	5	1.00
6	<b>Credits/Payments</b>		
a	2013 estimated tax payments and 2012 overpayment credited to 2013 . . . . .	6a	3.00
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	3.00
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached . . . . .	8	
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . .	9	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . .	10	2.00
11	Enter the amount of line 10 to be <b>Credited to 2014 estimated tax</b> <input type="checkbox"/> 2.00 <b>Refunded</b> <input type="checkbox"/> . . . . .	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? . . . . .		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? . . . . . If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file <b>Form 1120-POL</b> 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"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
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 <b>Form 990-T</b> for this year? . . . . .		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? . . . . .	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> . . . . .		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation. . . . .		X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (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	13	X	
14	The books are in care of <u>PAUL BIALY</u> Telephone no <u>248-435-1000</u> Located at <u>2135 W. MAPLE RD., TROY, MI</u> ZIP+4 <u>48084-7189</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>			
16	At any time during calendar year 2013, 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

**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	
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 2013?	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 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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)	2b	X
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 2013 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 2013)	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 2013?	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)? (see instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?**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? ☐ Yes ☐ No**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**7b****b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

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

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

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

**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 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 <u>DONATE AND APPLY ITS FUNDS EXCLUSIVELY FOR CHARITABLE, RELIGIOUS, SCIENTIFIC, LITERACY, AND EDUCATIONAL PURPOSES.</u>	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1 <u>N/A</u>	
2	
All other program-related investments See instructions	
3	

Total. Add lines 1 through 3 . . . . . ▶

Form 990-PF (2013)



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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	259,530.00
<b>b</b>	Average of monthly cash balances	<b>1b</b>	
<b>c</b>	Fair market value of all other assets (see instructions)	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	259,530.00
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	259,530.00
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	<b>4</b>	3,892.95
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	255,637.05
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	12,781.85

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

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	12,781.85
<b>2a</b>	Tax on investment income for 2013 from Part VI, line 5	<b>2a</b>	1.00
<b>b</b>	Income tax for 2013. (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	1.00
<b>3</b>	Distributable amount before adjustments Subtract line 2c from line 1	<b>3</b>	12,780.85
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b>	Add lines 3 and 4	<b>5</b>	12,780.85
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	<b>7</b>	12,780.85

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

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	981,649.00
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	981,649.00
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	<b>5</b>	
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	981,649.00

**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 2012	(c) 2012	(d) 2013
<b>1</b> Distributable amount for 2013 from Part XI, line 7 . . . . .				12,780.85
<b>2</b> Undistributed income, if any, as of the end of 2013				
<b>a</b> Enter amount for 2012 only . . . . .				
<b>b</b> Total for prior years 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2013				
<b>a</b> From 2008 . . . . .				
<b>b</b> From 2009 . . . . .				
<b>c</b> From 2010 . . . . .				
<b>d</b> From 2011 . . . . .				
<b>e</b> From 2012 . . . . .				
<b>f</b> Total of lines 3a through e . . . . .				
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 981,649.00				
<b>a</b> Applied to 2012, but not more than line 2a . . .				
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required - see instructions) . . . . .				
<b>d</b> Applied to 2013 distributable amount . . . . .				
<b>e</b> Remaining amount distributed out of corpus . .				
<b>5</b> Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a) )				
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5				
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .				
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed . . . . .				
<b>d</b> Subtract line 6c from line 6b Taxable amount - see instructions . . . . .				
<b>e</b> Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount - see instructions . . . . .				
<b>f</b> Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014 . . . . .				12,780.85
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions) . .				
<b>8</b> Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions) . . .				
<b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a . . . . .				
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2009 . . . . .				
<b>b</b> Excess from 2010 . . . . .				
<b>c</b> Excess from 2011 . . . . .				
<b>d</b> Excess from 2012 . . . . .				
<b>e</b> Excess from 2013 . . . . .				

**Part XIV Private Operating Foundations** (see 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 2013, 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) 2013	(b) 2012	(c) 2011	(d) 2010	
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	15.15	22.47	45.05	68.00	150.67
<b>b</b> 85% of line 2a	12.88	19.10	38.29	57.80	128.07
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed	981,649.00	348,720.00	336,601.00	289,229.00	1,956,199.00
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	981,649.00	348,720.00	336,601.00	289,229.00	1,956,199.00
<b>3</b> Complete 3a, b, or c for the alternative test relied upon					
<b>a</b> "Assets" alternative test - enter					
<b>(1)</b> Value of all assets	262,591.00	262,575.00	258,203.23	258,158.00	1,041,527.23
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)	262,591.00	262,575.00	258,203.23	258,158.00	1,041,527.23
<b>b</b> "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
<b>c</b> "Support" alternative test - enter					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> Gross investment income					

**Part XV Supplementary Information** (Complete this part only if the 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 address of the person to whom applications should be addressed

KRISTA SOHM, VP, COMMUNICATIONS, 2135 W. MAPLE RD., TROY, MI 48084

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

**NAME OF CHARITABLE ORGANIZATION, CHARITABLE PURPOSE, AND AMOUNT REQUESTED**

**c** Any submission deadlines:

**REQUEST MUST BE SUBMITTED BEFORE AUGUST OF THE PRIOR FISCAL YEAR**

**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**

<div>Recipient</div> <div>Name and address (home or business)</div>	<div>If recipient is an individual, show any relationship to any foundation manager or substantial contributor</div>	<div>Foundation status of recipient</div>	<div>Purpose of grant or contribution</div>	<div>Amount</div>
<div><b>a</b> <i>Paid during the year</i></div> <div>SEE ATTACHED STATEMENT</div>				<div>981,649.00</div>
<div><b>Total</b> . . . . . ▶ <b>3a</b></div>				<div>981,649.00</div>
<div><b>b</b> <i>Approved for future payment</i></div>				
<div><b>Total</b> . . . . . ▶ <b>3b</b></div>				

Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions to verify calculations )

## Line No.

▼

N/A

<p><b>1</b> 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?</p>		Yes	No
<p><b>a</b> Transfers from the reporting foundation to a noncharitable exempt organization of</p>			
(1) Cash	1a(1)		X
(2) Other assets	1a(2)		X
<p><b>b</b> Other transactions</p>			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
(3) Rental of facilities, equipment, or other assets	1b(3)		X
(4) Reimbursement arrangements	1b(4)		X
(5) Loans or loan guarantees	1b(5)		X
(6) Performance of services or membership or fundraising solicitations	1b(6)		X
<p><b>c</b> Sharing of facilities, equipment, mailing lists, other assets, or paid employees</p>		1c	X
<p><b>d</b> 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.</p>			

[illegible]

**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) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

Date \_\_\_\_\_

**Title**

STATE &amp; LOCAL TAX MGR

May the IRS discuss this return with the preparer shown below (see instructions)? ☐ Yes ☐ No

**Paid  
Preparer  
Use Only**

Print/Type preparer's name

Preparer's signature

Date

Check <input type="checkbox"/> if self-employed	PTIN
---	------

Firm's name 

Firm's address ►

Firm's EIN ▶

Phone no

**Schedule B**(Form 990, 990-EZ,  
or 990-PF)Department of the Treasury  
Internal Revenue Service**Schedule of Contributors**

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

▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No 1545-0047

**2013****Name of the organization****MERITOR, INC. TRUST (FKA ARVINMERITOR, INC. TRUST)****Employer identification number****52-2089611****Organization type** (check one):**Filers of:****Section:**

Form 990 or 990-EZ

☐ 501(c)( ) (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation☒ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

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

**Special Rules**

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions of \$5,000 or more during the year . . . . . ▶ \$ \_\_\_\_\_

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





Name of organization <b>MERITOR, INC. TRUST (FKA ARVINMERITOR, INC. TRUST)</b>	Employer identification number <b>52-2089611</b>
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**Part II** **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- ----- -----	\$ -----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- ----- -----	\$ -----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- ----- -----	\$ -----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- ----- -----	\$ -----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- ----- -----	\$ -----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
-----	----- ----- ----- -----	\$ -----	-----

Name of organization <b>MERITOR, INC. TRUST (FKA ARVINMERITOR, INC. TRUST)</b>	Employer identification number <b>52-2089611</b>
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**Part III** **Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year.** Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ► \$ \_\_\_\_\_

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	----- ----- -----	----- ----- -----	----- ----- -----
	<b>(e) Transfer of gift</b>		
	<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>
	----- ----- -----	----- ----- -----	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	----- ----- -----	----- ----- -----	----- ----- -----
	<b>(e) Transfer of gift</b>		
	<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>
	----- ----- -----	----- ----- -----	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	----- ----- -----	----- ----- -----	----- ----- -----
	<b>(e) Transfer of gift</b>		
	<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>
	----- ----- -----	----- ----- -----	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	----- ----- -----	----- ----- -----	----- ----- -----
	<b>(e) Transfer of gift</b>		
	<b>Transferee's name, address, and ZIP + 4</b>		<b>Relationship of transferor to transferee</b>
	----- ----- -----	----- ----- -----	

**STATEMENT ATTACHED TO AND MADE PART OF**

**RETURN OF PRIVATE FOUNDATION  
FORM 990-PF**

**MERITOR, INC. TRUST  
FEIN: 52-2089611**

**FOR THE TAX YEAR ENDED SEPTEMBER 28, 2014**

***Part I, Line 1 - Contributions, gifts, grants, etc. received***

Date	Donor	Amount
1/24/2014	Meritor, Inc.	117,700
Various	Meritor, Inc.	863,949
		<hr/>
		981,649
		<hr/>

**STATEMENT ATTACHED TO AND MADE PART OF**

**RETURN OF PRIVATE FOUNDATION  
FORM 990-PF**

**MERITOR, INC. TRUST  
FEIN: 52-2089611**

**FOR THE TAX YEAR ENDED SEPTEMBER 28, 2014**

***Part VII-A, Line 10 - Schedule of substantial contributors during the tax year***

Meritor, Inc.  
FEIN: 38-3354643  
2135 W. Maple Road  
Troy, MI 48084-7186

***Part VII-A, Line 8b - Copy of Form 990-PF to the Attorney General (or designate)***

Meritor, Inc. Trust is not required to register in the State of Michigan as a charitable trust since the contributions come solely from the parent company, Meritor, Inc. Therefore, a copy of Form 990-PF is not required to be sent to the Attorney General.

**STATEMENT ATTACHED TO AND MADE PART OF**

**RETURN OF PRIVATE FOUNDATION  
FORM 990-PF**

**MERITOR, INC. TRUST**  
**FEIN: 52-2089611**

**FOR THE TAX YEAR ENDED SEPTEMBER 28, 2014**

**Part VIII, Line 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
Ivor J. "Ike" Evans 2135 W. Maple Road, Troy, MI 48084	Executive Chairman/CEO/President - 5min	-0-	-0-	-0-
Jeffrey Craig 2135 W. Maple Road, Troy, MI 48084	President, Chief Operating Officer - 5min	-0-	-0-	-0-
Kevin Nowlan 2135 W. Maple Road, Troy, MI 48084	Sr. VP and CFO - 5min	-0-	-0-	-0-
Sandra Quick 2135 W. Maple Road, Troy, MI 48084	Sr. VP/Secretary/ General Counsel - 5min	-0-	-0-	-0-
Craig Frohock 2135 W. Maple Road, Troy, MI 48084	VP/Aftermarket - 5min	-0-	-0-	-0-

**STATEMENT ATTACHED TO AND MADE PART OF  
RETURN OF PRIVATE FOUNDATION  
FORM 990-PF**

**MERITOR, INC. TRUST**

**FEIN: 52-2089611**

**FOR THE TAX YEAR ENDED SEPTEMBER 28, 2014**

**Part XV, Line 3a - Grants and Contributions Paid During the Year or Approved for Future Payment**

Month	Recipient Name and address (home or business)	Amount	Total
1/24/2014	North Buncombe High School	1,000.00	
1/24/2014	Erwin High School	1,000.00	
1/24/2014	A.C. Reynolds High School	1,000.00	
1/24/2014	East Henderson High School	1,000.00	
1/24/2014	Enka High School	1,000.00	
1/24/2014	Meadowview Middle School	1,000.00	
1/24/2014	Access Soup Kitchen and Men's	500.00	
1/24/2014	Lincoln Middle School	1,000.00	
1/24/2014	United Way of Scotland County, Inc.	4,000.00	
1/24/2014	Rochester Institute of Technology	2,000.00	
1/24/2014	Manning Primary School	1,000.00	
1/24/2014	The Henry Ford	34,000.00	
1/24/2014	Friends of the Harvin Clarendon	1,000.00	
1/24/2014	Michigan Armed Forces Hospitality	10,000.00	
1/24/2014	Clarendon Habitat for Humanity	1,000.00	
1/24/2014	Clover Blue Eagle Robotics	500.00	
1/24/2014	Habitat for Humanity of York County	1,000.00	
1/24/2014	Charles D. Owen High School	1,000.00	
1/24/2014	Central Haywood High School	1,000.00	
1/24/2014	Pisgah High School	1,000.00	
1/24/2014	Chase High School	1,000.00	
1/24/2014	Chase Middle School	1,000.00	
1/24/2014	Campbell County High School	2,000.00	
1/24/2014	Simon Kenton High School	2,000.00	
1/24/2014	Walton-Verona High School	2,000.00	
1/24/2014	Larry A. Ryle High School	2,000.00	
1/24/2014	University of Kentucky - College	2,000.00	
1/24/2014	Simon House	1,000.00	
1/24/2014	Covington Street School	1,600.00	
1/24/2014	Scotland High School	3,000.00	
1/24/2014	Kingswood School	2,000.00	
1/24/2014	Westview Middle School	1,000.00	
1/24/2014	East Ridge Middle School	1,000.00	
1/24/2014	Newark High School	750.00	
1/24/2014	Newark High School Industrial	750.00	
1/24/2014	Ivy Tech Foundation	2,000.00	
1/24/2014	Purdue University	2,000.00	
1/24/2014	Children's Museum of Indianapolis	600.00	
1/24/2014	Hendersonville High School	1,000.00	
1/24/2014	Great Oaks	2,000.00	
1/24/2014	Northwood University	2,000.00	
1/24/2014	Gateway Community & Technical	2,000.00	
1/24/2014	American Cancer Society Relay for Life	3,000.00	
1/24/2014	Central Carolina Technical	4,000.00	
1/24/2014	Whitesburg Elementary School	1,000.00	
1/24/2014	Russellville Elementary School	1,000.00	
1/24/2014	Daily Bread	1,000.00	
1/24/2014	West Henderson High School	1,000.00	
1/24/2014	Food on Foot	2,000.00	
1/24/2014	North Henderson High School	1,000.00	
1/24/2014	Morristown-Hamblen High School	1,000.00	
1/24/2014	T. C. Roberson High School	1,000.00	
1/24/2014	Morristown-Hamblen High School	1,000.00	
1/24/2014	Asheville High School	1,000.00	117,700.00
	ABYSA	1,000.00	
	American Cancer Society	5,000.00	

**STATEMENT ATTACHED TO AND MADE PART OF  
RETURN OF PRIVATE FOUNDATION  
FORM 990-PF**

**MERITOR, INC. TRUST**

**FEIN: 52-2089611**

**FOR THE TAX YEAR ENDED SEPTEMBER 28, 2014**

**Part XV, Line 3a - Grants and Contributions Paid During the Year or Approved for Future Payment**

Month	Recipient Name and address (home or business)	Amount	Total
	BAWAC	2,000.00	
	Big Brothers/Big Sisters of Asheville-Buncombe Cty.	1,000.00	
	Blue Ridge Community College	1,000.00	
	Bluegrass Community Action Partnership	1,000.00	
	Boys and Girls Clubs of Henderson County	1,000.00	
	Buncombe Cnty Schools Foundation, Inc.	1,000.00	
	Carol Strawn Center	1,000.00	
	Clarendon County Chamber - Gibbons Street Park	8,800.00	
	C-TECH High School	500.00	
	Cultural and Heritage Commission of York County	1,000.00	
	Flat Rock Playhouse	1,000.00	
	Food Pantry Network of Licking County	1,500.00	
	Franklin County Career and Technical Center	1,000.00	
	Heath City Schools	500.00	
	Heath City Schools	1,000.00	
	Henderson County Chamber of Commerce	5,000.00	
	Henderson County Education Foundations, Inc.	1,000.00	
	Hendersonville Symphony Orchestra	1,000.00	
	Hendricks County Habitat for Humanity	2,600.00	
	Hendricks Regional Health YMCA	600.00	
	Interfaith Assistance Ministry	1,000.00	
	Junior Achievement of the Central Carolinas, Inc.	1,000.00	
	Licking County Coalition of Care	1,000.00	
	Licking County Schools	1,000.00	
	Licking Valley School District	500.00	
	Manna Food Bank	1,000.00	
	Ministerial Association Temporary Shelter (MATS)	1,000.00	
	Mission Healthcare	1,000.00	
	Newark Catholic High School	500.00	
	Newark Catholic High School	1,000.00	
	Newark City Schools	500.00	
	Noah's House	1,000.00	
	On-Track Financial Education & Counseling	1,000.00	
	Pardee Hospital Foundation	1,000.00	
	Park Ridge Hospital	1,000.00	
	Path Shelter	1,000.00	
	Richmond Community College Foundation, Inc.	3,000.00	
	Riley Children's Center	1,200.00	
	Rutherford County Schools Preschool (Carver Center)	1,000.00	
	Scotland County Literacy Council	1,000.00	
	Special Olympics	1,500.00	
	Special Olympics of Kentucky	2,000.00	
	St. Andrews Presbyterian College	1,000.00	
	St. Mark's Episcopal Church	1,000.00	
	St. Vincent de Paul Housing Facility, Inc.	1,000.00	
	Tennessee Technology Center	3,000.00	
	The Woodlands	1,000.00	
	United Way of Licking County	2,500.00	
	United Way of York County	5,000.00	
	University of North Carolina at Pembroke	3,000.00	
	Yokefellow Service Center	1,000.00	
	York Hospice and Community Center	1,000.00	
	York Technical College	11,000.00	
	York Technical College	2,500.00	
	Eastern Kentucky University	267.00	
	Northern Kentucky University	334.10	

**STATEMENT ATTACHED TO AND MADE PART OF  
RETURN OF PRIVATE FOUNDATION  
FORM 990-PF**

**MERITOR, INC. TRUST**

**FEIN: 52-2089611**

**FOR THE TAX YEAR ENDED SEPTEMBER 28, 2014**

**Part XV, Line 3a - Grants and Contributions Paid During the Year or Approved for Future Payment**

Month	Recipient Name and address (home or business)	Amount	Total
	Northern Kentucky University	244.20	
	Northern Kentucky University	315.20	
	Northern Kentucky University	394.90	
	Ohio Wesleyan	443.00	
	Ohio Bible College	408.00	
	Youth Emergency Services	1,000.00	
	Youth Emergency Shelter	1,000.00	
	Youth Empowerment Inc.	1,000.00	102,106.40
	American Cancer Society	30,000.00	
	Automation Alley Gala	5,000.00	
	BRAKES (Motor Sports)	10,000.00	
	Brooksie Way	7,169.00	
	Crittendon Gala	2,000.00	
	DAPCEP	1,250.00	
	Environmental Research & Education Foundation	1,700.00	
	Habitat for Humanity Car Show Build	5,405.00	
	Hammond for Hope	1,200.00	
	Kentucky State University	7,500.00	
	Kettering Development Fund	3,000.00	
	Michigan Opera Theatre	5,000.00	
	Michigan State University	10,000.00	
	Michigan Technological University	10,000.00	
	Oakland University	5,000.00	
	Ohio State University	8,000.00	
	United Way of Hamblin County	11,759.00	
	North Carolina State University	5,900.00	
	University of Cincinnati	7,500.00	
	University of Michigan	10,000.00	
	University of Michigan	1,000.00	
	University of Michigan - Ross School of Business	5,000.00	
	University of Michigan - Ross School of Business	3,000.00	
	USA Cares	5,000.00	
	Wayne State University	3,000.00	
	Wayne Wise	2,500.00	
	Western Carolina University	3,000.00	169,883.00
	Troy Community Coalition	5,000.00	
	PepsiCo Canada Foundation	2,804.92	
	Canadian Cancer Society	1,797.43	
	Environmental Research & Education Foundation	6,500.00	
	Wayne Wise	5,000.00	
	Waste Management Golf Outing (Oregon Food Bank)	5,000.00	
	AUSA/Celebrate Michigan's Military	5,000.00	
	MAN	9,000.00	
	Barenherz	13,994.77	
	Formula Truck KIDS	15,723.69	
	NHRA B.R.A.K.E.S.	5,000.00	
	Rescue Remembrance Project	15,000.00	
	USA Cares	5,000.00	
	National Bar Association Institute	12,500.00	
	D. Augustus Straker Bar Foundation	1,000.00	
	Michigan Roundtable for Diversity and Inclusion	2,500.00	
	UNCF Walk for Education	5,000.00	
	FIRST Robotics	5,000.00	
	FIRST Robotics	2,500.00	
	American Cancer Society	1,000.00	
	American Heart Association	10,000.00	



**STATEMENT ATTACHED TO AND MADE PART OF  
RETURN OF PRIVATE FOUNDATION  
FORM 990-PF**

**MERITOR, INC. TRUST**

**FEIN: 52-2089611**

**FOR THE TAX YEAR ENDED SEPTEMBER 28, 2014**

**Part XV, Line 3a - Grants and Contributions Paid During the Year or Approved for Future Payment**

Month	Recipient Name and address (home or business)	Amount	Total
	Leukemia/Lymphoma Society	7,500.00	
	Leukemia/Lymphoma Society	2,500.00	
	March of Dimes	10,000.00	
	Brooksie Way	7,065.00	161,385.81
	Asheville-Buncombe Technical Community	1,000.00	
	BMS College of Engineering	1,624.00	
	Brazil University (donation)	10,699.00	
	Brigham Young University	10,000.00	
	Central Michigan University	5,000.00	
	Clemson University	3,000.00	
	Clemson University	6,000.00	
	Clemson University	10,000.00	
	Clemson University	3,000.00	
	Cornell University	2,000.00	
	Isothermal Community College	1,000.00	
	Kentucky State University	7,500.00	
	Kettering University	7,500.00	
	Michigan State University	10,000.00	
	Michigan State University	10,000.00	
	N. Carolina State	5,500.00	
	Oakland University	5,000.00	
	PES College of Engineering	1,624.00	
	PES College, Mandya	1,630.00	
	Purdue University	2,500.00	
	Purdue University	2,500.00	
	Purdue University	3,800.00	
	RV College of Engineering	1,624.00	
	University of Cincinnati	10,000.00	
	University of Michigan	5,000.00	
	University of Michigan	5,000.00	
	University of Michigan	2,000.00	
	University of Michigan	1,000.00	
	University of North Carolina at Asheville	3,000.00	
	University of Nuevo Leon	7,875.86	
	University of Nuevo Leon	9,844.89	
	Wayne State University	14,500.00	170,721.75
	Associacao Pestalozzi de Osasco	10,500.00	
	AACD Osasco - SP	10,500.00	
	Juvenile Diabetes Research Foundation	500.00	21,500.00
	United Way of Hamblen County	14,047.00	
	United Way of Henderson County	54,111.00	
	United Way of Rutherford County	10,611.22	78,769.22
	A Beautiful Me	856.00	
	Alzheimer's Association of Greater Michigan	1,150.00	
	American Cancer Society	1,130.50	
	American Heart Association	876.50	
	American Red Cross International Response	1,208.00	
	ASPCA	1,198.06	
	Barbara Ann Karmanos Cancer Institute	1,085.00	
	Boys & Girls Club of Troy	946.50	
	Cassie Himes Shoes Cancer Foundation, Inc.	1,072.50	
	CURED NFP	1,094.50	
	Detroit Cristo Rey High School	1,175.00	
	EcoWorks	1,953.00	
	Fallen and Wounded Soldiers Fund	2,507.15	
	Forgotten Harvest	1,014.00	

**STATEMENT ATTACHED TO AND MADE PART OF  
RETURN OF PRIVATE FOUNDATION  
FORM 990-PF**

**MERITOR, INC. TRUST**

**FEIN: 52-2089611**

**FOR THE TAX YEAR ENDED SEPTEMBER 28, 2014**

**Part XV, Line 3a - Grants and Contributions Paid During the Year or Approved for Future Payment**

Month	Recipient Name and address (home or business)	Amount	Total
	For the Seventh Generation	1,143.00	
	Freedom Center	1,650.00	
	Gaddes Foundation	1,114.00	
	Habitat for Humanity Oakland	829.00	
	HAVEN, Inc.	2,479.50	
	Here to Help Foundation	1,353.50	
	Junior Achievement of SE Michigan	976.50	
	Leader Dogs for the Blind	960.00	
	Leukemia Lymphoma Society - Regatta	1,117.00	
	March of Dimes	1,205.00	
	Michigan Veterans Foundation	1,687.31	
	National Kidney Foundation of Michigan	1,250.00	
	National Kidney Foundation of Michigan	1,267.50	
	St. Jude Children's Hospital	1,432.50	
	St. Jude Children's Hospital	1,095.00	
	Stefan's Hope	1,118.88	
	Teens in Need/Marine City Arts	1,050.50	
	UNCF Walk for Education	999.00	
	United Ukrainian American Relief Council	1,243.00	
	University of Michigan - CS Mott	5,500.00	
	University of Michigan - CS Mott	1,150.50	
	West Bloomfield High School Robotics	1,150.00	
	Habitat for Humanity Detroit	1,204.00	
	Pancreatic Cancer Action Network	3,686.50	
	Cystic Fibrosis Foundation	1,042.00	
	Leukemia and Lymphoma Society - Light the Night	1,117.50	
	Paws for Life Rescue and Adoption	1,081.50	
	Leukemia and Lymphoma Society - Light the Night	1,190.00	
	Wish Upon A Teen	1,035.00	59,394.90
	City of Troy - Transit Center	1,000.00	
	Fraternal Order of Police Lodge #130	750.00	
	American Gear Mfr. Assn	1,000.00	
	Hammond for Hope	1,540.00	
	Sacred Heart - Robotics	10,000.00	
	Breast Cancer Golf Outing	200.00	
	Canadian Cancer Society	5,000.00	
	National Kidney Foundation of Michigan	10,000.00	29,490.00
	Trucker Buddy	10,000.00	
	InForum Center for Leadership	20,000.00	
	InForum Center for Leadership	10,000.00	
	InForum Center for Leadership	700.00	
	Focus: HOPE	10,000.00	
	Focus: HOPE	5,000.00	
	Junior Achievement of SE Michigan	10,000.00	
	Skills USA	5,000.00	70,700.00
Total FY14 contribution payments			<u>981,651.08</u>

**Application for Extension of Time To File an  
Exempt Organization Return**

OMB No 1545-1709

► **File a separate application for each return.**  
► **Information about Form 8868 and its instructions is at [www.irs.gov/form8868](http://www.irs.gov/form8868).**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☐
- 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](http://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	Enter filer's identifying number, see instructions	
Name of exempt organization or other filer, see instructions.	Employer identification number (EIN) or	
<b>Meritor, Inc. Trust (FKA ArvinMeritor, Inc.)</b>	<b>52-2089611</b>	
Number, street, and room or suite no. If a P.O. box, see instructions	Social security number (SSN)	
<b>2135 W. Maple Rd</b>		
City, town or post office, state, and ZIP code. For a foreign address, see instructions.		
<b>Troy, MI 48084</b>		

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 (other than individual)	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

- The books are in the care of ► **Meritor, Inc.**

Telephone No. ► **248-435-1000** 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 **May 15**, 20 **15**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☐ calendar year 20 \_\_\_\_ or

► ☒ tax year beginning **September 30**, 20 **13**, and ending **September 28**, 20 **14**.

- 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

<b>3a</b> If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>3a</b>	\$
<b>b</b> If this application is for Forms 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.	<b>3b</b>	\$
<b>c Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>3c</b>	\$

**Caution.** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

• If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** and check this box ☐ **Part II**

**Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868.

• If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** (on page 1).

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed).

Enter filer's identifying number, see instructions

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
	Number, street, and room or suite no. If a P.O. box, see instructions.	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	

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

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01		
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	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

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

- The books are in the care of ☐ Telephone No. ☐ 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.

- I request an additional 3-month extension of time until \_\_\_\_\_, 20 \_\_\_\_.
- For calendar year \_\_\_\_\_, or other tax year beginning \_\_\_\_\_, 20 \_\_\_\_\_, and ending \_\_\_\_\_, 20 \_\_\_\_.
- If the tax year entered in line 5 is for less than 12 months, check reason: ☐ Initial return ☐ Final return  
☐ Change in accounting period
- State in detail why you need the extension \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

<b>8a</b> If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	<b>8a</b>	\$
<b>b</b> If this application is for Forms 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 and any amount paid previously with Form 8868.	<b>8b</b>	\$
<b>c Balance due.</b> Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	<b>8c</b>	\$

**Signature and Verification must be completed for Part II only.**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form

Signature ☐

Title ☐

Date ☐