

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

2001

Department of the Treasury
Internal Revenue Service

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

For calendar year 2001, or tax year beginning , and ending

G Check all that apply Initial return Final return Amended return Address change Name change
Use the IRS label Otherwise, print or type See Specific Instructions
Name of organization: The Gerber Foundation
Employer identification number: 38-6068090
Telephone number: 231-924-3175
City or town state and ZIP code: Fremont MI 49412
Section 501(c)(3) exempt private foundation
Fair market value of all assets at end of year: \$ 83,984,750
Accounting method: Cash

Part I Analysis of Revenue and Expenses (The total of amount in col. (b) (c) & (d) may not necessarily equal the amounts in column (a) (see pg. 10 of the instr.))

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Contributions, interest, dividends, rents, sales, other income, 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 (See instructions)			Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value			
1	Cash-non-interest-bearing						
2	Savings and temporary cash investments	1,095,685	123,646	123,646			
3	Accounts receivable ▶						
	Less allowance for doubtful accounts ▶						
4	Pledges receivable ▶						
	Less allowance for doubtful accounts ▶						
5	Grants receivable						
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)						
A	7 Other notes & loans receivable ▶						
S	Less allowance for doubtful accounts ▶						
S	8 Inventories for sale or use						
e	9 Prepaid expenses and deferred charges						
t	10a Investments-U S and state government obligations (att schedule) Stmt 7	87,289,665	83,677,894	83,846,584			
S	b Investments-corporate stock (attach schedule)						
	c Investments-corporate bonds (attach schedule)						
	11 Investments-land, buildings, & equipment basis ▶						
	Less accumulated depreciation ▶						
	12 Investments-mortgage loans						
	13 Investments-other (attach schedule)						
	14 Land, buildings and equipment basis ▶ 29,737						
	Less accumulated depreciation ▶ 15,217	17,005	14,520	14,520			
	15 Other assets (describe ▶ )						
	16 Total assets (to be completed by all filers-see page 16 of the instructions Also, see page 1, item I)	88,402,355	83,816,060	83,984,750			
L	17 Accounts payable and accrued expenses						
i	18 Grants payable						
a	19 Deferred revenue						
b	20 Loans from officers directors, trustees, and other disqualified persons						
	21 Mortgages and other notes payable (att sch )						
	22 Other liabilities (describe ▶ )						
	23 Total liabilities (add lines 17 through 22)	0	0				
N	Organizations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>						
e	and complete lines 24 through 26 and lines 30 and 31						
A	24 Unrestricted	88,402,355	83,816,060				
S	25 Temporarily restricted						
S	26 Permanently restricted						
e	Organizations that do not follow SFAS 117, check here ▶ <input type="checkbox"/>						
r	and complete lines 27 through 31						
F	27 Capital stock, trust principal, or current funds						
u	28 Paid-in or capital surplus, or land, bldg , and equipment fund						
n	29 Retained earnings, accumulated income, endowment or other funds						
B	30 Total net assets or fund balances (see page 17 of the instructions)	88,402,355	83,816,060				
a	31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	88,402,355	83,816,060				

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	88,402,355
2	Enter amount from Part I, line 27a	2	-4,586,295
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	83,816,060
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)-Part II, column (b) line 30	6	83,816,060

**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 Investments - See Schedule</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>			-2,373,801
<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			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
<b>a</b>			-2,373,801
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

<b>2</b> 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 ]	<b>2</b>	-2,373,801
<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 pages 13 and 17 of the 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 organization liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No

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

(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))
2000	4,965,742	97,918,005	5.071327
1999	4,529,894	87,589,533	5.171730
1998	3,976,303	79,174,506	5.022201
1997	3,547,199	73,420,223	4.831365
1996	1,535,356	66,355,582	2.313831

<b>2</b> Total of line 1, column (d)	<b>2</b>	22.410454
<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>	4.482091
<b>4</b> Enter the net value of noncharitable-use assets for 2001 from Part X line 5	<b>4</b>	85,315,406
<b>5</b> Multiply line 4 by line 3	<b>5</b>	3,823,914
<b>6</b> Enter 1% of net investment income (1% of Part I line 27b)	<b>6</b>	21,521
<b>7</b> Add lines 5 and 6	<b>7</b>	3,845,435
<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 on page 18	<b>8</b>	4,325,224

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling letter (attach copy of ruling letter if necessary-see instructions)		
b	Domestic organizations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	21,521
c	All other domestic organizations 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	0
3	Add lines 1 and 2	3	21,521
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0
5	Tax based on investment income Subtract line 4 from line 3 If zero or less, enter -0-	5	21,521
6	Credits/Payments		
a	2001 estimated tax payments and 2000 overpayment credited to 2001	6a	40,804
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	40,804
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	19,283
11	Enter the amount of line 10 to be Credited to 2002 estimated tax <input type="checkbox"/> 19,283   Refunded <input type="checkbox"/>	11	

**Part VII-A Statements Regarding Activities**

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a		X
4b	N/A	
5		X
6	N/A	
7	X	
8a		
8b	X	
9		X
10		X
11	X	

12 The books are in care of  Cathy Obits Telephone no  231-924-3175  
 Located at  4747 W. 48th St. Fremont, MI ZIP + 4  49412

13 Section 4947(a)(1) nonexempt chantable 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  13

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

Table with columns for question descriptions, Yes/No checkboxes, and Yes/No columns. Rows include questions 1a through 6b regarding disqualifying activities, taxes on failure to distribute income, and business holdings.

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

**1 List all officers, directors, trustees, foundation managers and their compensation (see page 20 of the instructions)**

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

**2 Compensation of five highest-paid employees (other than those included on line 1-see page 21 of the instructions) If none, enter "NONE"**

(a) Name and address of each employee paid more than \$50,000	(b) Title and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Barbara Getz Newaygo, MI 49337	Ex. Director 40	92,243	7,379	0

Total number of other employees paid over \$50,000 ▶ 0

**3 Five highest-paid independent contractors for professional services-(see page 21 of the instructions) If none, enter "NONE"**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
None		

Total number of others receiving over \$50,000 for professional services ▶

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

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

**Part IX-B Summary of Program-Related Investments** (see page 21 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See page 22 of the instructions	
3	
<b>Total</b> Add lines 1 through 3	

**Part X Minimum Investment Return** (All domestic foundations must complete this part Foreign foundations, see page 22 of the instructions)

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a Average monthly fair market value of securities	1a	86,023,169
b Average of monthly cash balances	1b	591,456
c Fair market value of all other assets (see page 22 of the instructions)	1c	
d Total (add lines 1a, b, and c)	1d	86,614,625
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2 Acquisition indebtedness applicable to line 1 assets	2	
3 Subtract line 2 from line 1d	3	86,614,625
4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 23 of the instructions)	4	1,299,219
5 Net value of noncharitable-use assets Subtract line 4 from line 3 Enter here and on Part V, line 4	5	85,315,406
6 Minimum investment return Enter 5% of line 5	6	4,265,770

**Part XI Distributable Amount** (see page 23 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here  and do not complete this part)

1 Minimum investment return from Part X, line 6	1	4,265,770
2a Tax on investment income for 2001 from Part VI, line 5	2a	21,521
b Income tax for 2001 (This does not include the tax from Part VI)	2b	
c Add lines 2a and 2b	2c	21,521
3 Distributable amount before adjustments Subtract line 2c from line 1	3	4,244,249
4a Recoveries of amounts treated as qualifying distributions	4a	
b Income distributions from section 4947(a)(2) trusts	4b	
c Add lines 4a and 4b	4c	
5 Add lines 3 and 4c	5	4,244,249
6 Deduction from distributable amount (see page 23 of the instructions)	6	
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII line 1	7	4,244,249

**Part XII Qualifying Distributions** (see page 23 of the instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a Expenses contributions, gifts, etc -total from Part I column (d), line 26	1a	4,325,224
b Program-related investments-Total from Part IX-B	1b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8 and Part XIII line 4	4	4,325,224
5 Organizations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I line 27b (see page 24 of the instructions)	5	21,521
6 Adjusted qualifying distributions Subtract line 5 from line 4	6	4,303,703

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

**Part XIII Undistributed Income** (see page 24 of the instructions)

	(a) Corpus	(b) Years prior to 2000	(c) 2000	(d) 2001
1 Distributable amount for 2001 from Part XI, line 7				4,244,249
2 Undistributed income, if any, as of the end of 2000				
a Enter amount for 2000 only				
b Total for prior years 19____, 19____, 19____				
3 Excess distributions carryover, if any, to 2001				
a From 1996				
b From 1997	42,504			
c From 1998	311,230			
d From 1999	315,377			
e From 2000	357,740			
f Total of lines 3a through e	1,026,851			
4 Qualifying distributions for 2001 from Part XII, line 4 <b>\$ 4,325,224</b>				
a Applied to 2000, but not more than line 2a				
b Applied to undistributed income of prior years (Election required-see page 24 of the instructions)				
c Treated as distributions out of corpus (Election required-see page 24 of the instructions)				
d Applied to 2001 distributable amount				4,244,249
e Remaining amount distributed out of corpus	80,975			
5 Excess distributions carryover applied to 2001 (If an amount appears in column (d) the same amount must be shown in column (a) )				
6 Enter the net total of each column as indicated below	1,107,826			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount-see page 25 of the instructions				
e Undistributed income for 2000 Subtract line 4a from line 2a Taxable amount-see page 25 of the instructions				
f Undistributed income for 2001 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2002				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or 4942(g)(3) (see page 25 of the instructions)				
8 Excess distributions carryover from 1996 not applied on line 5 or line 7 (see page 25 of the instructions)				
9 Excess distributions carryover to 2002 Subtract lines 7 and 8 from line 6a	1,107,826			
10 Analysis of line 9				
a Excess from 1997	42,504			
b Excess from 1998	311,230			
c Excess from 1999	315,377			
d Excess from 2000	357,740			
e Excess from 2001	80,975			



**Part XIV Private Operating Foundations** (see page 25 of the instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2001, enter the date of the ruling N/A

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

	Tax year		Prior 3 years		(e) Total
	(a) 2001	(b) 2000	(c) 1999	(d) 1998	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a b, or c for the alternative test relied upon					
a "Assets" alternative test-enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test-Enter 2/3 of min investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test-enter					
(1) Total support other than gross investment income (interest, dividends rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

**Part XV Supplementary Information** (Complete this part only if the organization had \$5,000 or more in assets at any time during the year-see page 26 of the instructions )

1 Information Regarding Foundation Managers

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

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

Check here  if the organization only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the organization makes gifts, grants etc (see page 26 of the instructions) to individuals or organizations under other conditions complete items 2a, b c and d

a The name, address, and telephone number of the person to whom applications should be addressed  
Cathy Obits 231-924-3175  
4747 W. 48th Street Fremont, MI 49412

b The form in which applications should be submitted and information and materials they should include  
See Stmt 8

c Any submission deadlines  
See Stmt 9

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields kinds of institutions, or other factors  
See Stmt 10

**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 Paid during the year See Attached				4,017,746
<b>Total</b>			▶ 3a	4,017,746
b Approved for future payment See Attached				2,774,661
<b>Total</b>			▶ 3b	2,774,661

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Table with 5 columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Rows include Program service revenue, membership dues, interest on savings, dividends, rental income, other investment income, and other revenue. Total amount is 436,215.

(See worksheet in line 13 instructions on page 26 to verify calculations)

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

Table with 2 columns: 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 organization's exempt purposes.

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

Table with 3 columns: Question, Yes, No. Rows include 1a(1) Cash, 1a(2) Other assets, 1b(1) Sales of assets, 1b(2) Purchases of assets, 1b(3) Rental of facilities, 1b(4) Reimbursement arrangements, 1b(5) Loans or loan guarantees, 1b(6) Performance of services, and 1c Sharing of facilities.

a Transfers from the reporting organization to a noncharitable exempt organization of

- (1) Cash
(2) Other assets

b Other Transactions

- (1) Sales of assets to a noncharitable exempt organization
(2) Purchases of assets from a noncharitable exempt organization
(3) Rental of facilities, equipment, or other assets
(4) Reimbursement arrangements
(5) Loans or loan guarantees
(6) Performance of services or membership or fundraising solicitations

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting organization. If the organization 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.

Schedule table with 4 columns: (a) Line no, (b) Amount involved, (c) Name of noncharitable exempt organization, (d) Description of transfers, transactions, and sharing arrangements. Row 1 contains 'N/A'.

2a Is the organization 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 (with checked box for No)

b If "Yes," complete the following schedule

Schedule table with 3 columns: (a) Name of organization, (b) Type of organization, (c) Description of relationship. Row 1 contains 'N/A'.

Under penalties of perjury, I declare that I have examined this return including accompanying schedules and statements, and to the best of my knowledge and belief it is true, correct, and complete. Declaration of preparer (other than taxpayer or filer).

Signature section containing: Signature of officer or trustee, Preparer's signature (C. John Kurstang Jr.), Firm's name (Hendon & Slate, P.), and address (P.O. Box 9, Fremont, MI 49412).

## Federal Statements

### Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets

Desc	Date Acquired	Date Sold	Sale Price	How Rec'd	Cost & Expense	Whom Sold	Deprec	Net G/L
Investments - See Schedule			\$ -2373801		\$		\$	\$ -2373801
Total			<u>\$ -2373801</u>		<u>\$ 0</u>		<u>\$ 0</u>	<u>\$ -2373801</u>

### Statement 2 - Form 990-PF, Part I, Line 11 - Other Income

Description	Amount
Other Income	\$ 915
Total	<u>\$ 915</u>

### Statement 3 - Form 990-PF, Part I, Line 16a - Legal Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Clark Hill, PC	\$ 2,491	\$ 2,491	\$ 2,491	\$
Total	<u>\$ 2,491</u>	<u>\$ 2,491</u>	<u>\$ 2,491</u>	<u>\$ 0</u>

### Statement 4 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Crowe Chizek	\$ 7,500	\$	\$	\$ 7,500
Hendon & Slate	17,000	\$	\$	17,000
Total	<u>\$ 24,500</u>	<u>\$ 0</u>	<u>\$ 0</u>	<u>\$ 24,500</u>

### Statement 5 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Federal Excise Tax	\$ 36,000	\$	\$	\$
Foreign Investment Taxes	50,035	50,035	50,035	\$
Filing Fees	10	\$	\$	10
Total	<u>\$ 86,045</u>	<u>\$ 50,035</u>	<u>\$ 50,035</u>	<u>\$ 10</u>

**Federal Statements**

**Statement 6 - Form 990-PF, Part I, Line 23 - Other Expenses**

<u>Description</u>	<u>Total</u>	<u>Net Investment</u>	<u>Adjusted Net</u>	<u>Charitable Purpose</u>
	\$	\$	\$	\$
Expenses				
Insurance	8,931			8,931
Investment Fees	603,351	603,351	603,351	
Dues and Subscriptions	21,641			21,641
Supplies and Postage	6,836			6,836
Contracted Services	3,761			3,761
Miscellaneous	2,414			2,414
Meals	1,445			1,445
Total	<u>\$ 648,379</u>	<u>\$ 603,351</u>	<u>\$ 603,351</u>	<u>\$ 45,028</u>

# Federal Statements

## Statement 7 - Form 990-PF, Part II, Line 10a - US and State Government Investments

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Basis of Valuation</u>	<u>Fair Market Value</u>
	<u>\$87,289,665</u>	<u>\$83,677,894</u>	Cost	<u>\$83,846,584</u>
Total	<u>\$87,289,665</u>	<u>\$83,677,894</u>		<u>\$83,846,584</u>

## Federal Statements

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**Statement 8 - Form 990-PF, Part XV, Line 2b - Application Format and Required Contents**

Grant Application Form

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**Statement 9 - Form 990-PF, Part XV, Line 2c - Submission Deadlines**

February 1st, May 1st, August 1st

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**Statement 10 - Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations**

The Foundation focuses in the area of infants, children,  
nutrition, and education



**The Gerber Foundation**  
Federal ID # 38-6068090  
Schedule of Capital Gains  
For the Year Ended December 31, 2001

Month	William Blair		Pimco		Alliance		Massachusetts Financial		Lord Abbett		Invesco		Duff & Phelps	
	Short-term	Long-term	Short-term	Short-term	Long-term	Short-term	Long-term	Short-term	Long-term	Short-term	Long-term	Short-term	Long-term	
Jan	46,984	-		(214,838)	183,032	5,240	-	(73,681)	(257,746)	-	(36,622)	(26,661)	277,048	
Feb	-	(26,413)		(413,690)	109,493	72,903	211,426	(25,935)	23,001	(30,513)	-	93,364	(85,689)	
Mar	13,525			(355,321)	(75,441)	3,414	323,004	52,591	28,833	-	-	(643,333)	178,224	
April	-	4,160		(63,648)	128,993	-	-	38,592	315,528	(36,674)	50,268	(380,738)	(137,057)	
May	4,518			(70,632)	48,205	(182,066)	168,369	(11,271)	33,826	-	7,113	26,749	26,485	
June	6,724	(5,753)		(20,652)	2,062	118,892	31,571	(49,328)	58,492	-	33,348	(168,770)	(79,281)	
July	-	91,638		(50,683)	57,597	15,895	9,560	32,135	8,168	-	-	-	-	
Aug	36,559	26,243		(1,745)	(52,256)	75,875	-	(14,310)	(29,610)	-	(2,052)	(98,186)	163,596	
Sept	-	-		(22,289)	(41,262)	(33,169)	(181,804)	(24,389)	(53,511)	-	(18,571)	(212,660)	(16,271)	
Oct	(11,211)	34,370		(111,145)	(63,107)	(79,639)	(541,032)	116	(436,229)	(66,468)	(119,851)	(30,149)	4,556	
Nov	15,191	(20)		(54,042)	(13,857)	(25,710)	21,908	(3,903)	(8,332)	-	(123,194)	(27,541)	-	
Dec	(68,617)	(452)	110,401	(18,485)	(6,635)	7,576	(209,148)	(21,379)	45,557	3,113	(31,973)	98,881	-	
Adj	-	(12,338)		701,415	(262,482)	-	24,959	-	50,439	-	(86,549)	-	22,484	
<b>Total</b>	<b>43,673</b>	<b>111,433</b>	<b>110,401</b>	<b>(695,755)</b>	<b>14,341</b>	<b>(20,789)</b>	<b>(141,186)</b>	<b>(100,761)</b>	<b>(221,584)</b>	<b>(130,541)</b>	<b>(328,085)</b>	<b>(1,369,045)</b>	<b>354,095</b>	

Total Short Term Capital Gain (loss) (2,162,816)

Total Long Term Capital Gain (210,985)

Total Capital Gain (2,373,801)

**The Gerber Foundation**  
Federal ID #38-6068090  
Listing of Members, Officers, and Trustees  
For the Year Ended December 31, 2000

Officers

Barbara J Ivens	President
Jane Jeannero	Vice-President
Fernando Flores	Secretary
Stan M VanderRoest	Treasurer

Trustees

Steven W Poole	Jane M Jeannero
Tracy A Baker	David C Joslin
Fernando Flores	William B Weil, Jr
Ted C Davis	Carolyn R Morby
Stan M VanderRoest	Randy A Puff
Michael G Ebert	John J James
Barbara J Ivens	

**The Gerber Foundation**  
Monthly Average of Securities at Fair Market Value  
For the Year Ended December 31, 2001

	<u>Merrill Lynch</u>	<u>PIMCO</u>	<u>William Blair</u>	<u>Duff &amp; Phelps</u>	<u>Alliance</u>	<u>Financial</u>	<u>Massachusetts Abbett</u>	<u>Lord Invesco</u>
January	170,210	14,139,346	16,038,058	12,989,948	18,299,904	18,257,901	5,854,100	10,627,590
February	170,941	14,275,886	16,782,053	11,859,818	15,723,021	15,697,973	5,340,726	10,016,061
March	171,684	14,333,502	16,916,538	11,167,264	14,449,038	13,333,026	5,134,973	9,382,737
April	172,243	14,201,718	16,320,962	11,891,977	15,989,288	16,309,045	5,407,326	10,014,980
May	22,388	14,257,137	16,268,697	12,179,263	15,989,565	16,217,603	5,581,883	9,869,209
June	22,464	14,297,022	16,290,257	11,916,935	15,454,294	16,322,632	5,902,515	9,610,092
July	22,529	14,792,467	16,146,371	11,714,490	15,107,004	14,682,185	5,619,309	9,377,149
August	37	14,245,071	14,345,353	11,689,518	13,935,160	13,160,339	5,500,397	9,191,697
September	37	14,481,378	14,520,378	10,572,628	12,953,752	10,913,882	4,680,876	8,139,567
October	37	14,791,889	14,702,343	10,836,039	13,375,099	11,781,696	5,003,624	8,384,741
November	37	14,581,290	14,604,252	11,700,571	14,657,464	12,535,333	5,307,280	8,736,378
December	10	14,513,525	14,505,166	12,008,941	14,790,218	13,495,933	5,777,570	8,755,221
	752,617	172,910,231	187,440,428	140,527,392	180,723,807	172,707,548	65,110,579	112,105,422
	12	12	12	12	12	12	12	12
Average Value \$	62,718	\$14,409,186	\$ 15,620,036	\$ 11,710,616	\$ 15,060,317	\$ 14,392,296	\$ 5,425,882	9,342,119

Monthly Avg FMV of securities

\$ 86,023,169

**The Gerber Foundation**  
Federal ID #38-6068090  
Monthly Average of Cash Balances

	Beginning Cash	Ending Cash		
January	\$ 1,095,685 44	680,625 15		
February	680,625 15	217,902 05		
March	217,902 05	164,537 06		
April	164,537 06	90,277 50		
May	90,277 50	250,609 51		
June	250,609 51	105,988 77		
July	105,988 77	3,738 82		
August	3,738 82	1,593,432 29		
September	1,593,432 29	1,487,737 04		
October	1,487,737 04	1,377,703 92		
November	1,377,703 92	515,253 05		
December	515,253 05	123,648 09		
	<u>\$ 7,583,490 60</u>	<u>6,611,453 25</u>	14,194,943 85	
			24	
			Avg cash balance	<u>591,455 99</u>

Name	Address	Purpose of Grant	Amount
AAD Arkansas PO Box 791150, Baltimore, MD 21279		Hentage Giving	495
A B Technical Community College Asheville, NC 28801		Hentage Giving	6,000
American Cancer Society One Point Place, Madison WI 53719		Matching Grants	2,310
Alternatives in Motion Breton SE Grand Rapids, MI		Directors Gifts	1,000
AKL Educational Foundation PO BOX 20430, Indianapolis, IN 46208		Matching Grants	645
Allen, Kevin Muldrow, OK 74948		Scholarship	2,250
Althiser Heather Reedsburg WI 53959		Scholarship	1,500
Alzheimers Disease Research Rockville MD 20850		Matching Grants	75
Allen Scott A 6152 West Pat, Fremont MI 49412		Scholarship	1,500
Alpha Women's Center 101 Wood Newaygo, MI 49337		Hentage Giving Matching Grants	2,205 848
Alzheimers Association-Fort Smith Fort Smith AR 72901		Hentage Giving	500
Alzheimers Association-Reedsburg Madison, WI 53705		Hentage Giving	500
American Dietetic Assn Foundation 216 West Jackson Blvd , Chicago IL 60606		Education & Training	12,600
American Cancer Society Waukesha, WI 53188		Hentage Gving Matching Grants	150 100
American Society for Nutritional Services 9650 Rockville Pike Bethesda, MD 20814		Hentage Giving	22,000
American Cancer Society Fort Smith AR 72901		Hentage Giving Matching Grants	1,000
Amenca's Keswick Whiting, NJ 08759-3501		Matching Grants	2 115
American Red Cross Muskegon, MI 49443		Matching Grants	1,354
American Red Cross Madison, WI 53705		Matching Grants	2,510
Arkansas Association of the Deaf, Inc Little Rock , AR 72203		Hentage Gving	385
American Red Cross Newaygo MI 49337		Matching Grants	75
Anderson, Brooke L 9155 S Pnceton St Highlands Ranch CO 80126		Scholarship	1,500
Anderson, Verelene 2605 East Baseline, White Cloud MI 49349		Scholarship	1 500
Angel, Tiffany L 12 Palatka St Arden, NC 28704		Scholarship	1 500

THE GERBER  
FOUNDATION

990 PF  
PART XV  
LINE 3 A

38-6068090

Aquinas College Grand Rapids, MI 49506	Scholarship	1,000
Arc of Newaygo County, The 37 E Main, Fremont MI 49412	Hentage Gving Matching Grants	233 75
Arkansas Special Olympics Little Rock, AR 72225	Hentage Gving	515
Arkansas Rice Depot Fort Smith, AR 72901	Hentage Gving	1,000
Arthntis Foundation-Michigan Southfield, MI 48037	Matching Grant	75
Arkansas Shenffs' PO Box 3964, Batesville, AR 72503	Hentage Gving	200
Arkansas Valley Habitat for Humanity PO Box 754, Fort Smith, AR 72902	Hentage Gving	2,000
Arter, Demetra 1525 N 43rd Ft Smith, AR 72904	Scholarship	1,500
Arizona State University - KAET Tempe, AZ 85280	Matching Grants	150
Bakos Joel Newaygo, MI 49337	Scholarshisp	1,500
Barros, Greg 2507 So Houston, Ft Smith AR 72901	Scholarship	1,500
Beezley, James W 3243 N Rverwood, Twin Lake, MI 49457	Scholarship	1 500
Belasco, Kayla M 838 Fremont Rd, Newaygo, MI 49337	Scholarship	1,500
Belasco, Matt 838 Fremont Rd, Newaygo, MI 49337	Scholarship	1,500
Best Human Development Services Fort Smith, AR	Hentage Gving	200
Bethany Christian Services 6995 W 48th St, Fremont, MI 49412	Infant & Child Matching Grants Hentage Gving	688,480 600 7,975
Biblical Theological Seminary 200 N Main St , Hatfield, PA 19440	Matching Grant	600
Blamer, Jamie Pentwater, MI 49449	Scholarship	1,500
Blandford Tara Fremont MI 49412	Scholarship	3,000
Blodgett Butterworth Hlth Care Foundation 100 Michigan St NE Grand Rapids MI 49503	Matching Grants Directors Gifts	600 10,000
Blue Lake Public Radio 300 East Crystal Lake Rd, Twin Lake, MI 49457	Matching Grant	765
Blue Lakes Fine Arts Camp 300 East Crystal Lake Rd, Twin Lake MI 49457	Matching Grant Directors Gifts	300
Blum Shea Fremont, MI 49412	Scholarship	1 500
Blue Ridge Community College Flat Rock, NC 28731	Hentage Gving	4,000
Booher, Stacey 244 W 8th Street Hespera MI 49421	Scholarship	1,500
Boston Medical Center 91 E Concord, Boston MA 02118	Science & Research	67,562

BOST Guiding Lifetime Opportunities Fort Smith, AR 72917	Hentage Gving	1,000
Bouwma, Arley Grand Haven, MI 49417	Hentage Gving	200
Bradshaw, Molly Fremont MI 49412	Scholarship	1,500
Brown, Nathan Rathdrum ID 83858	Scholarship	1 500
Breuker, Daniel Fremont, MI 49412	Scholarship	1,500
Breuker, Lisa 2727 S Croswell, Fremont, MI 49412	Scholarship	1,500
Ball State University Foundation Muncie, IN 47308	Matching Grants	150
Burgess, Celine White Cloud, MI 49349	Scholarship	1,500
Bushouse, Micah Fremont, MI 49412	Scholarship	1,500
Buter Thomas Fremont, MI 49412	Scholarship	1,500
Bnelle, Burt White Cloud MI 49349	Scholarship	1,500
Busch, Amy L 322 Miller St, Fremont, MI 49412	Scholarship	1,500
Buter, John S 3698 W 48th St Fremont MI 49412	Scholarship	1,500
Buter, Mathew Fremont, MI 49412	Scholarship	1 500
Calvin College 3201 Burton St SE, Grand Rapids, MI 49502	Matching Grant	3,053
Calvin Theological Seminary 3233 Burton St SE, Grand Rapids MI 49546	Matching Grant	638
Calvin College Alumni Association Grand Rapids, MI 49502	Matching Grant	75
Candelighters of Central Arkansas Little Rock AR 72212	Hentage Gving	500
Children's Defense Fund Washington DC 20001	Infant & Child	123,000
Carolinas District Kiwanis Found Clinton, SC 29325	Matching Grants	750
Children's Emergency Shelter Fort Smith AR 72901	Hentage Gving	1 000
Children's Sunshine Netork Grand Rapids MI 49505	Hentage Gving	5,000
Chaplaincy Services, Newaygo County Fremont MI 49412	Hentage Gving Matching Grants	1 613 600
Childrens National Medical Center Washington DC 20010	Science & Research	148,000
Chrstian Reformed World Relief Grand Rapids MI 49560	Matching Grants	750

Chrstofferson, Jason 563 S Stone, Fremont MI 49412	Scholarship	1,500
Chrstofferson Hannah Fremont, MI 49412	Scholarship	1,500
Central Michigan University Carlin Alumni House, Mt Pleasant MI 48859	Matching Grant Scholarship	1,125 2,000
Cotton, Lucas White Cloud, MI 49349	Scholarship	1 500
Church World Service Elkart, IN 46515	Matching Grants	4,560
Baylor College of Medicine Houston, TX 77030	Science & Research	92,664
Blackburn College Carlinville, IL 62626	Matching Grants	150
Hope College PO Box 9000, Holland MI 49422	Matching Grants	1,275
Haywood Community College 185 Freelander Dr, Clyde, NC 28721	Heritage Giving	4,000
LaFayette College Easton PA 18042	Directors Gifts	1,500
Baker College Fremont, MI 49412	Matching Grants Scholarship	650 1,000
Saint Mary College Leavenworth KS 66048	Matching Grants Scholarship	375 1,000
Claborn Jennifer E PO Box 426, Panama OK 74951	Scholarship	1 500
Claxton-Hepburn Medical Center Ogdensburg, NY 13669	Matching Grants	450
William Tyndale College PO Box 1529, Clemson SC 29633	Matching Grant	300
Crawford County 4-H Foundation Van Buren, AR 72956	Matching Grant	300
Concordia College 4090 Geddes Rd, Ann Arbor, MI 48105	Matching Grants	5,850
Children's Hospital of Montefiore Bronx NY 10467	Heritage Giving	1,000
Clemson University Clemson SC 29633	Matching Grants	2,550
Hiram College Hiram, OH 44234	Matching Grants	150
St Peter's College Jersey City, NJ 07306	Matching Grants	263
Trinity Christian College Palos Heights, IL 60463	Matching Grants	225
Close-Up Foundation Muskegon, MI 49441	Directors Gifts	350
Conklin, Robert S 4209 S Highland Dr, Fremont MI 49412	Scholarship	750
Cornerstone Christian Academy Fremont MI 49412	Matching Grants Scholarship	2 871 1,000



Cornell University Ithaca, NY 14851	Matching Grants	150
Corporates Chaplaincy Service PO Box 1721, Ft Smith, AR 72902	Hentage Gving	5,000
Council onf Michigan Foundations Grand Haven, MI 29417	Hentage Gving	6,000
Council on Foundations Conferences Baltimore, MD 21263	Hentage Gving	9 000
Crawford County Arts Association Van Buren, AR 72956	Hentage Giving	200
Crawford County Softball Association Van Buren AR 72956	Hentage Giving	200
Crossroad Bible Institute Grandville, M 49418	Matching Grants	75
City of White Plains Youth Bureau White Plains, NY 10601	Hentage Giving	400
Cousineau Travis Newaygo, MI 49337	Scholarship	1,500
Cystic Fibrosis Foundation Little Rock AR 72211	Hentage Gving	575
DCC Foundation Baltimore, MD 21222	Matching Grants	168
Dekkers, Jodi Fremont, MI 49412	Scholarship	1,500
Delta Sigma Theta Sorornty 1826 Eloise, Muskegon, MI 49444	Directors Gifts	1,000
Dekkers, Melanie Newaygo, MI 49437	Scholarship	1,500
Dickinson, Brandon White Cloud, MI 49349	Scholarship	1 500
Doctors without Borders USA Toms Rivers NY 08754	Matching Grants	300
DeLange, Matthew Fremont MI 49412	Scholarship	1,500
Dordt College 498 4th Ave NE, Sioux Center IA 51250	Matching Grant	150
The Downtown Volunteers Fort Smith AR 72902	Hentage Giving	200
Dreikom, Stephen 520 W Pine, Fremont, MI 49412	Scholarship	1,500
DeVos children s Hospital Foundation Grand Rapids, MI 49503	Hentage Giving Matching Grants Directors Gifts	5,000 375 1 950
Eagle Village Center Hersey MI 49639	Hentage Giving	6,000
Eastern MI University Ypsilanti MI 48197	Scholarship	1 000
Ele's Place Lansing MI 48933	Directors Gifts	5 000
Evangelical Child & Family Agency heaton IL 60187	Matching Grants	75

Grand Rapids Community College Grand Rapids MI 49503	Scholarship	1,000
Grand Valley State University Grand Rapids MI 49504	Scholarship	2,000
Faith Christian School 7729 W 48th St, Fremont, MI 49412	Matching Grants	12,120
Family Service Ministry Alma AR 72921	Heritage Giving	500
Feed the Children Oklahoma City, OK 73101	Matching Grants	113
Ferns State University 401 Oak St, West Bldg, Big Rapids, MI 49307	Matching Grant Scholarship	563 2 000
Fifield, Heather Fremont, MI 49412	Scholarship	750
Focus on the Family Colorado Springs CO 80955	Heritage Giving	3,000
Fortin, Steven Ft Smith AR 72903	Scholarship	1 500
Fort Smith Symphony Ft Smith, AR 72901	Heritage Giving	500
Fremont Area District Library Main Street Fremont, MI 49412	Education & Training	50 000
Fremont Area Community Foundation 4424 W 48th St, Fremont, MI 49412	Matching Grants	5 468
Fremont Christian School 208 Hillcrest, Fremont MI 49412	Matching Grants	4,725
Fremont Cooperative Preschool PO Box 264 Fremont, MI 49412	Heritage Giving	143
Fremont Public Schools Fremont MI 49412	Heritage Giving	1 957
Fuller Theological Seminary 135 N Oakland Ave, Pasadena, CA 91101	Matching Grant	2,250
First Reformed Church Fremont, MI 49412	Matching Grants	375
Froehle Matthew Fremont, MI 49412	Scholarship	1,500
Fort Smith Boys & Girls Club Fort Smith AR 72904	Heritage Giving	500
Family Talk Grand Rapids, MI 49504	Heritage Giving	5,000
The First Tee Fort Smith AR 72916	Heritage Giving	500
Fort Smith Boys Club Fort Smith, AR 72904	Heritage Giving	3 000
Fort Smith Public Library Fort Smith AR 72903	Heritage Giving	500
Gardner, Glona White Muskegon MI 49441	Heritage Giving	200
Gateway House Fort Smith, AR 72904	Heritage Giving	1,000

Gearhart, Jennifer Fremont, MI 49412	Scholarship	1,500
Gerber Memorial Health Services Fremont, MI 49412	Matching Grants Directors Gifts	3,600 3,150
Girdner, Darren III Sallisaw OK 74955	Scholarship	1 500
Girl Scouts Muskegon, MI 49445	Matching Grant	75
Glancy, Audrey Fremont MI 49412	Scholarship	1,500
Global Friendship, Inc Fremont, MI 49412	Infant & Child	2 000
Grace Bible College Grand Rapids MI 49509	Matching Grants	2,250
Gerald R Ford council, BSA Fremont, MI 49412	Heritage Giving Matching Grants Directors Gifts	532 4,688 2,000
Gerber Memorial Hospital Fremont, MI 49412	Matching Grants	450
The Gray Center Jenison MI 49429	Heritage Giving	1 000
God's Bible School and College 1810 Young St , Cincinnati, OH 45210	Matching Grant	975
Grand Rapids Ballet Grand Rapids, MI 49503	Matching Grant Directors Gift	375 3 000
Grand Valley State University PO Box 1668, Grand Rapids MI 49501	Matching Grant	5 256
Guilford County Schools Greensboro, NC 27409	Directors Gifts	10,000
Grand Rapids Christian School Grand Rapids MI 49508	Matching Grants	1,875
Greenstone Farm Credit Services Grand Rapids MI 49514	Heritage Giving	1,975
Grey, Jeffrey Hesperia, MI 49421	Scholarship	1,500
Griggs, Kyle N 514 Viking View Dr, Reedsburg, WI 53959	Scholarship	1,500
Grand Rapids Symphony Grand Rapids MI 49503	Heritage Giving	2,064
Habitat for Humanity International Americus, GA 31709	Matching Grants	300
Habitat for Humanity-Muskegon County Muskegon, MI 49441	Heritage Giving	5 000
Habitat for Humanity - Newaygo County Fremont, MI 49412	Heritage Giving Matching Grant	500 75
Habitat for Humanity - Soland County New Rochelle NY 10801	Matching Grants	150
Hacksisombath Odene Van Buren AR 72956	Scholarship	1 500
Hannah House Fort Smith, AR 72902	Heritage Giving	750

Harrington Inn, Inc Fremont, MI 49412	Heritage Giving	71
Hanover College PO Box 108, Hanover, IN 47243	Matching Grant	1,125
Harvard Business School Fund Soldiers Field, Boston, MA 02138	Matching Grant	188
Hauk Nora Grand Rapids MI 49504	Scholarship	1,500
Hawes, Steven Fremont, MI 49412	Scholarship	1,500
Hawes Brian Fremont, MI 49412	Scholarship	1,500
Hendersonville Rescue Mission Hendersonville, NC 28793	Matching Grants	150
Health Adventure 25 Pack Square, Asheville, NC 28802	Heritage Giving	3 000
Herrewig, Terry W 404 Center St, Wonewoc WI 53968	Scholarship	1 500
Hesperia Library Hesperia, MI 49421	Heritage Giving Matching Grants	75,000 1,875
Hindes, Jedediah R 2520 S Wisner, Fremont, MI 49412	Scholarship	1,500
Hepburn Medical Center Foundation Ogdensburg NY 13669	Matching Grant	450
Holton Public Schools Holton, MI 49425	Heritage Giving	7,483
Hope College Holland MI	Matching Grants	450
Hospice of Newaygo County 819 W Main Fremont MI 49412	Heritage Giving Matching Grants	750 900
Hospice of Michigan Southfield MI 48075	Heritage Giving Matching Grants	7,000 75
Howard Elementary School Fort Smith, AR 72901	Heritage Giving	3 669
Hren, Karen Fremont MI 49412	Scholarship	1,500
Hren Kathryn Fremont, MI 49412	Scholarship	1 500
Housatonic Coucil of Boy Scouts 326 Derby Ave Derby, CT 06418-2700	Heritage Giving	1,000
IAM DL 837 GDA Westchester, IL 60154	Matching Grants	1 772
Institute for Healing Racism Muskegon MI 49442	Heritage Giving	25,000
Illinois Wesleyan University PO Box 2900 Bloomington IL 61702	Matching Grant	1,200
Institute of Food Technologists 221 N LaSalle St Chicago IL 60601	Heritage Giving	12,600
International Aid Spring Lake MI 49546	Matching Grants	300

Ironton/LaValle Elementary LaValle, WI 63941	Hentage Gving	1,000
Iowa State University Ames, IA 50014	Matching Grants	150
Jamison, Stephanie Sallisaw OK 74955	Scholarship	1,500
Johnston Craig Twin Lake MI 49451	Scholarship	1 500
Jones Amanda Charleston AR 72933	Scholarship	1,500
Jones, Garry W Spno, OK 74959	Scholarship	1,500
Jones Jacob Spno, OK 74959	Scholarship	1,500
Jones, Jennifer Alto, MI 49302	Scholarship	1,500
Jumpstart Boston, MA 02110	Education & Training	320,040
Juvenile Diabetes Foundation Madison, WI 53719	Matching Grants	75
Killgoar Foundation Grand Rapids, MI 49506	Directors Gifts	4,000
Kincy, Kristal M 3617 Old Dollard Way Van Buren AR 72956	Scholarship	1,500
Kooi, Krysti Fremont, MI 49412	Scholarship	1 500
Kobishop, Amanda Reedsburg, WI 53959	Scholarship	1,500
Kossen Kathleen A 3700 Sherman, Fremont MI 49412	Scholarship	1,500
Lakeshore Rescue Mission Muskegon, MI 49442	Hentage Giving	3,000
Lambouths, Danny L III Muskegon Heights MI 49444	Scholarship	1 500
LaSalle Academy Providence, RI 02908	Matching Grants	900
Launtzen Lisa J 6433 S Fitzgerald, Fremont, MI 49412	Scholarship	1 500
Lawson, Casey C 513 Evergreen, Van Buren, AR 72956	Scholarship	1,500
LaValle Fire Department LaValle WI 53941	Hentage Giving	500
Le An Hoang Baring AR 72923	Scholarship	1 500
Le, Diem H Baring, AR 72923	Scholarship	1 500
Literacy Council-Western Arkansas Fort Smith, AR 72901	Hentage Giving	250
Less Bryan Twin Lake MI 49457	Scholarship	1 500

Local Initiatives Support Corp New York, NY 10017	Special Initiative	100 000
The Leukemia & Lymphoma Society Pittsfield, MA 01202	Matching Grants	225
Loyal Order of the Moose Fremont, MI 49412	Heritage Giving	143
Lucile Packard Foundation Palo Alto, CA 94304	Education & Training	200,000
Lyn Sage Cancer Foundation Chicago, IL 60611	Directors Gifts	1,000
Lucas, Ryan C 2112 Sue St Fremont, MI 49412	Scholarship	1,500
Madonna University 36600 Schoolcraft Rd, Livonia, MI 48150	Matching Grant	150
Malone, Barry Grant, MI 49327	Heritage Giving	200
Maggio, Kurt Brownsburg, IN 46112	Scholarship	1,500
Mamrelund Lutheran Church Kent City MI 49330	Matching Grants	1,450
Mexican American Legal Defense Los Angeles, CA 90014	Education & Training	50,000
Manchip Kirk Fremont, MI 49412	Scholarship	1,500
Manchip, Ty Jason 4683 S Dickinson, Fremont MI 49412	Scholarship	1,500
Mapson, Stephanie Muskegon, MI 49442	Scholarship	1,500
March of Dimes Reedsburg WI	Heritage Giving	2,500
Make-A-Wish Foundation Mt Kisco, NY 10549	Heritage Giving	2,415
Manistee Catholic Central Schools Manistee, MI 49660	Matching Grants	750
Martorella Dana Howard Beach NY 11414	Scholarship	1,500
Matthews, Ken Fremont, MI 49412	Scholarship	1 500
Muskegon County Catholic 1851 Barclay Muskegon, MI 49441	Matching Grants	75
Muskegon Community College 221 South Quarterline Rd Muskegon, MI 49442	Scholarship Heritage Giving	9 500 550
Muskegon Community Health Project 565 W Western Ave, Muskegon MI 49440	Heritage Giving	10,000
McNally, Judi 5355 Third Street Fremont MI 49412	Heritage Giving	200
Muscular Dystrophy Association Grand Rapids MI 49503	Heritage Giving Matching Grants	2,855 3,136
Meiberyer, Megan Fremont, MI 49412	Scholarship	1 500

Mercy Corp Portland, OR 97208	Infant & Child	30,000
Messerty, Bryan Overland Park, KS 66213	Scholarship	1,500
Micheal Lydia Lavaca, AR 72941	Scholarship	1,500
Michigan FFA Foundation Lansing, MI 48909	Heritage Giving	4,000
Michigan State University 4700 S Hagadom Rd East Lansing, MI 48823	Matching Grants Scholarship	3,165 2,000
Mountain Area Hospice PO Box 16, Asheville NC 28802	Heritage Giving	2,000
Mountain Home Fire & Rescue 3710 Asheville Highway Mountain Home NC 28758	Matching Grants	300
Mormson, Stephen Fremont, MI 49412	Heritage Giving	200
Michigan State Medical Society East Lansing, MI 48823	Directors Gifts	5,000
MIT Cambridge MI 02139	Matching Grants	150
Michigan Theological Seminary Plymouth, MI 48170-4308	Matching Grants	975
Morgan Ashely Etowah, NC 28729	Scholarship	1,500
Michigan Organizing Project Muskegon Heights MI 49444	Heritage Giving	5,000
Mazalene Roberts Towner Scholarship Chicago IL 60643	Directors Gifts	3,000
Mary Free Bed Hospital Grand Rapids MI 49503	Science & Research	800
Memorial Mission Hospital Asheville NC 28801	Heritage Giving	5,000
Memorial Sloan Kettering Cancer Center New York, NY 10021	Matching Grants	75
Muskegon County Cooperating Churches Muskegon, MI 49442-1520	Heritage Giving	10,000
MSU-MI 4-H Foundation Newaygo Co HRH 4700 S Hagadom Rd , East Lansing MI 48823	Matching Grants	2,250
MSU Coop Extension Fremont, MI 49412	Heritage Giving	5,000
MSU For Children Youth and Family East Lansing MI 48824	Science & Research	72,273
MSU Development East Lansing MI 48824	Matching Grants	150
MSU Foundation Bozeman MI 59717	Matching Grants	150
MSU Dept fo Pediatrics/Human Development East Lansing MI 48824	Infant & Child	891
Mt Olive College Mt Olive NC 28365	Matching Grants	75

Myers, Cali R 6122 Barbary, Newaygo MI 49337	Scholarship	1,500
Myers, Micah Newaygo, MI 49337	Scholarship	1,500
National Fire Safety Council Reedsburg, WI 53959	Heritage Giving	110
National Federation of the Blind Little Rock, AR 72219-2841	Heritage Giving	500
National Medical Fellowship, Inc 110 W 32nd St New York, NY 10001	Heritage Giving	12,600
National Junior Horticulture Foundation 11230 Garr Road Benen Springs, MI 49103	Matching Grants	2,250
New Brunswick Theological Seminary New Brunswick, NJ 08901	Heritage Giving Matching Grants	10,000 2,250
NCCS-Center for Nonprofit Housing Fremont MI 49412	Heritage Giving	5 000
NCCS Fund at TFAF 4 West Oak St, Fremont, MI 49412	Heritage Giving Matching Grant	13,262 3,346
Newaygo County Health Dept White Cloud, MI 49349	Heritage Giving	124
Newaygo County ISD Fremont, MI 49412	Heritage Giving	4,185
Newaygo County Mental Health Newaygo, MI 49337	Heritage Giving	423
Newaygo County Veterans Services White Cloud, MI 49349	Heritage Giving	95
National Child Safety Council Baraboo, WI 53913	Heritage Giving	480
New York Botanical Garden Bronx, NY 10458	Heritage Giving	4,000
Newaygo Public Schools Newaygo, MI 49337	Matching Grants	300
Newaygo Medical Care Facility Fremont MI 49412	Matching Grants	1 530
Newaygo County Agrc Fair Assoc Box 14, Fremont, MI 49412	Heritage Giving	5,000
Newaygo County Society of History & Geneology 2305 S Warner Fremont, MI 49412	Heritage Giving	143
Nguyen Lam T Fort Smith AR 72904	Scholarship	1 500
Nguyen, Chnsann Fort Smith, AR 72908	Scholarship	1,500
Norberg, Lisa Hesperia, MI 49412	Scholarship	1 500
Nguyen, Hong Diem #7 Woodland Place, Ft Smith AR 72904	Scholarship	1,500
Northern Public Radio DeKalb IL 60115	Matching Grants	180
Northern Michigan University 1401 Presque Isle Ave , Marquette, MI 49855	Matching Grant	150



Norwalk Symphony Orchestra 83 East Ave., Suite 207, Norwalk, CT 06851	Heritage Giving	600
National Park Foundation Washington D C 20036	Directors Gifts	2,000
Nurses for Newborns 9505 Gravois, St Louis, MO 63123	Education & Training	27,600
O'Brien Man M 6748 Lake Dr, Fremont, MI 49412	Scholarship	1,500
Olivet College Olivet, MI 49076	Matching Grants	3,000
Osterman, Staci Muskegon MI 49442	Scholarship	1,500
Our Lady of Mercy High School Rochester, NY 14610	Matching Grant	150
Pardee Hospital Foundation 715 Fleming St, Hendersonville, NC 28791	Heritage Giving Matching Grants	3,000 225
Park Ridge Hospital PO Box 1569, Fletcher, NC 28732	Heritage Giving	3,000
Parker, Kacy N 8260 W 116th St, Grant, MI 49327	Scholarship	1 500
Parker Elementary School Fort Smith, AR 72904	Heritage Giving	2 500
Prevent Child Abuse Newaygo 600 Peach Lane, Newaygo, MI 49337	Heritage Giving	708
Prevent Child Abuse Amenca 200 S Michigan, Chicago, IL 60604	Heritage Giving	210,000
Pediatric Aids Foundation 1311 Colorado Ave Santa Monica, CA 90404	Science & Research	140,000
Philadelphia Biblical University Langhorne, PA 19047	Matching Grant	150
Phoenix Children's Hospital Phoenix, AZ 85006	Infant & Child	53,650
Phoenix Christian School 2425 N 26th, Phoenix, AZ 85008	Matching Grants	300
Pilgrim Manor Foundation 2000 Leonard NE Grand Rapids, MI 49505	Matching Grants	900
Pittman, Lisa 7511 Ursula Charleston, AR 72933	Scholarship	1,500
Planned Parenthood Centers of W MI Grand Rapids MI 49503-4691	Matching Grant	165
Powell Katie Grant, MI 49327	Scholarship	1 500
Poole, Steven 2522 Berwyck SE Grand Rapids, MI 49506	Heritage Giving	66
Purdue Foundation 1801 Purdue Memorial Union, Lafayette IN 47907	Matching Grants	675
Purdy Kyle Fremont, MI 49412	Scholarship	1 500
Reedsburg Area Medical Center Reedsburg WI 53959	Heritage Giving	1 400

Rasmussen, Amy 220 Cedar Fremont, MI 49412	Scholarship	1 500
Reedsburg Area United Fund 195 Main Street, Reedsburg, WI 53959	Heritage Giving	5,000
Reedsburg Area Youth Football Reedsburg, WI 53959	Heritage Giving	1,000
Reedsburg Area Youth Hockey Reedsburg, WI 53959	Heritage Giving	1,000
Reedsburg Boy Scouts of America Reedsburg, WI 53959	Heritage Giving	200
City of Reedsburg Reedsburg, WI 53959	Heritage Giving	250
Redinger, Enn Fremont, MI 49412	Scholarship	1,500
Reedsburg Music Boosters 1580 Canterbury Drive, Reedsburg, WI 53959	Heritage Giving	250
Reeman Christian Reformed Church Fremont MI 49412	Heritage Giving	171
Reformed Bible College 3333 East Beltline NE, Grand Rapids, MI 49505	Matching Grant	1 725
Rehoboth School Box 41 Rehoboth, NM 87322	Matching Grant	150
Rensselaer Polytechnic Institute 110 8th St , Pittsburgh Building, Troy, NY 12180	Matching Grant	300
The Regents of the University of MI Ann Arbor, MI 48109	Science & Research	89 059
Soccer Club of Reedsburg Reedsburg, WI 53959	Heritage Giving	1,000
Rosencrans Aaron 5330 E Hightower Rd, Hesperia, MI 49421	Scholarship	1,500
Ruffner Laura A 3802 Bobwhite Lanes, Rolling Meadows IL 60008	Scholarship	1,500
Michigan Technological University Houghton, MI 49931	Matching Grants	1,000
Moody Bible Institute Chicago IL 60610	Matching Grant	563
Salvation Army P O Box 4121 Carol Stream, IL 60197	Matching Grant	225
Sanders, Stewart Fremont MI 49307	Heritage Giving	200
Seager, Adnana Big Rapids, MI 49307	Scholarship	1 500
Seventh Day Baptist Church PO Box 38 White Cloud, MI 49349	Heritage Giving	485
Sloan, Todd R 8178 Ruprecht Rd, Twin Lake MI 49457	Scholarship	1 500
Special Olympics Wisconsin PO Box 8546, Madison WI 53708	Heritage Giving	360
St Tinkhon's Theological Seminary PO Box 130, South Canaan PA 18459	Matching Grant	1,500

St Michael School 10250 Maple Island Rd , Fremont, MI 49412	Matching Grants	6 750
Strategic Air Command Omaha, NE 68108-0348	Directors Gifts	2,000
Sacred Heart Academy Hamden, CT 06514	Matching Grants	375
Schwaller, Rachel Conklin, MI 49403	Scholarship	1,500
Sanders Meats Custer, MI 49405	Heritage Giving	734
Sauk City Historical Society Baraboo, WI 53913	Heritage Giving	500
Shields, Meredith Alma AR 72921	Scholarship	1 500
Shull, Michelle Grant, MI 19327	Scholarship	1,500
Smith, Lee Walkerville, MI 49459	Scholarship	1 500
SOS Head Start Partnerships Washington D C 20005	Infant & Child	89,000
Sudden Infant Death Syndrome All Baltimore, MD 21208	Directors Gifts	5,000
Susan Komen Breast Cancer Foundation Fort Smith, AR 72908	Heritage Giving	2,500
Special Olympics Michigan Mount Pleasant, MI 48804	Matching Grant	75
Spring Hill Initiatives Evanston, MI 49631	Matching Grant	2 250
Smith Melissa Fremont, MI 49412	Scholarship	1,500
Spina Bifida Association of Arkansas North Little Rock AR 72119	Heritage Giving	200
Southern Poverty Law Center Montgomery AL 36104	Directors Gifts	9,000
Sunny Ridge Family Center Wheaton IL 60187	Matching Grant	150
Stamer, Trisha Algonquin, IL 60102	Scholarship	1 500
St Adalbert Church South Bend IN 46619	Matching Grant	88
St Joseph's Academy Richmond, MI 48062	Matching Grant	780
St Lawrence University Canton, NY 13617-9988	Matching Grants	240
St Judes Childrens Research Memphis, TN 38105	Heritage Giving Matching Grants	200 150
Summer Outdoor Adventure club Inc Reedsburg WI 53959	Heritage Giving	250
St Peter's Lutheran School Reedsburg WI 53959	Heritage Giving	2 000

St John's Home Grand Rapids, MI 49505	Directors Gifts	3 000
Syracuse University Syracuse, NY 13210-9978	Matching Grants	113
Sebastian County 4-H Fort Smith AR 72902	Heritage Giving	300
Taylor University Fort Wayne, IN 46807	Scholarship	1 000
Taraumara Mission Detroit, MI 48205	Matching Grants	150
Tayter, Michael I 446 Lewis Lane, Fremont MI 49412	Scholarship	1,500
Turpentine Creek Wildlife Refuge Eureka Springs, AR 72632	Heritage Giving	200
The Fremont Area Foundation-Fremont Library Fremont, MI 49412	Heritage Giving	8,000
Targowski, John Naperville IL 60564	Scholarship	1,500
Thomas Megan Fremont, MI 49412	Scholarship	1 500
Thunderbird Glendale, AZ 85306	Matching Grants	150
Tibbe, Dena Holton, MI 49425	Scholarship	1,500
Tran, AnBinh Fort Smith, AR 72901	Scholarship	1 500
Transitional Living Center Muskegon Heights MI 49444	Heritage Giving	5,000
Tierra Santa Support, Inc Eden Prairie, MN 55347	Matching Grant	2 250
Tnce, Keinya White Cloud, MI 49349	Scholarship	1 500
Tnnity Mission Rosewood Dr Columbia SC 29208	Matching Grants	750
UNC - Chapel Hill PO Box 2446, Chapel Hill, NC 27515	Matching Grant	375
United Way of Asheville & Buncombe County 50 S French Broad Ave , Asheville, NC 28801	Heritage Giving	10,000
University of Arkansas 325 Admin Bldg, Fayetteville AR 72701	Matching Grant Directors Gifts	225 2,000
University of Chicago 5736 Woodlawn Ave, Chicago, IL 60637	Matching Grants	2,025
University of Maine PO Box 550, Orono ME 04473	Matching Grants	600
University of MI 1000 State St Ann Arbor MI 48109	Directors Gifts Matching Grant Science & Research	4,500 352 197,323
Dickinson State University Dickinson, ND 58601	Matching Grant	93
Emory University Atlanta GA 30322	Matching Grants	150

Florida State University Foundation Tallahassee, FL 32310	Matching Grants	150
Fayetteville State University Fayetteville, NC 28301	Matching Grants	75
Miami University Oxford, OH 45056	Matching Grant	150
University of South Carolina Columbia, SC 29208	Matching Grant	750
University of Kentucky Lexington, KY 40508	Matching Grant	75
Ohio State University Columbus OH 43271	Matching Grant	75
Oregon Health Sciences University Portland OR 97201	Science & Research	106,211
Purdue University West Lafayette, IN 47907	Matching Grant Directors Gifts	2 250 5 000
University of St Francis Lutheran Fort Wayne, IN 46807	Matching Grants	1,500
Rockhurst University Kansas City, MI 64110-2561	Matching Grants	300
Washington University St Louis, MO 63130	Matching Grant	375
Washburn University Topeka, KS 66621	Matching Grant	225
Urban League of Greater Muskegon 1095 Third Street, Ste 201, Muskegon, MI 49440	Directors Gifts	11 000
Utah State University College of Family Life, Logan, UT 84322	Matching Grant	2 250
UTAG, Villa Park Boxing club 300 S Ardmore Ave Villa Park, IL 60181	Directors gifts	4,000
United Way 320 S 18th, Ft Smith, AR 72901	Hentage Giving	7 500
United Way of Henderson County Hendersonville, NC 28793	Matching Grants	450
United Way of Newaygo County PO Box B Fremont MI 49412	Matching Grant	1,579
Van Buren boys and girls Club PO Box 443 Van Buren AR 72956	Hentage Giving	300
Vann, LaToya Fort Smith AR 72903	Scholarship	1 500
Vanderbilt University Nashville, TN 37232	Infant & Child	100,000
VanSyckle Kristen 9 Brndlewood Ct Algonquin IL 60102	Scholarship	1,500
Vasques, Sarah Fremont MI 49412	Scholarship	1,500
Vasquez Katie Fremont MI 49412	Scholarship	1,500
Vassar College Poughkeepsie MY 12601	Matching Grant	750
Vera Wilsie Elementary Newaygo, MI 49337	Matching Grant	225
Wake Forest Univ -School of Medicine Winston Salem NC 27157	Matching Grants	150

Western Arkansas Ballet Fort Smith, AR 72917	Hentage Gving	500
Wayne State University, Div Of Detroit, MI 49201	Matching Grant	1,200
Westchester Arts Council 701 Westchester Ave, White Plains, NY 10604	Hentage Gving	300
Westchester Center for Train & Dev White Plains, NY 10607	Hentage Gving	300
Westchester Philharmonic Hartsdale NY 10530	Hentage Gving	300
Western Michigan University 1201 Oliver St, Kalamazoo MI 49008	Matching Grants Scholarship	750 4,000
Western Theological Seminary 101 East 13th St , Holland, MI 49423	Matching Grant	750
We Care Foundation, Inc PO Box 10010 Fort Smith, AR 72917	Hentage Gving	1,436
Wells College Aurora, NY 13026	Matching Grants	270
Westmas Comne Reedsburg WI 53959	Scholarship	1,500
West Point Fund West Point, NY 10996	Matching Grant	450
Jacob Wetterling Foundation St Joe MN 56374	Directors Gifts	1,000
WGPU-3 Fort Myers, FL 33965	Matching Grants	150
WGVU Grand Rapids, MI 49505	Matching Grants	1,645
Woodward Brent Hespera, MI 49421	Scholarship	1 500
Watershed Human & Comm Development Little Rock, AR 72206	Hentage Gving	200
White Plains Beautification Found Box 1614 White Plains NY 10602	Hentage Gving	500
Women & Infants Hosp of Rhode Island Providence, RI 02905	Science & Research	97 371
Wilson Jennifer Mansfield AR 72944	Scholarship	3,000
Witte Kevin D Fremont, MI 49412	Scholarship	1,500
Witte, Kyle Fremont, MI 49412	Scholarship	1 500
WMC Foundation - Business World Madison, WI 53701	Hentage Gving	1 000
Woodward Enc 9453 Sunset Blvd, Hespera MI 49421	Scholarship	1,500
Wisconsin Council on Economic Ed Milwaukee, WI 53201	Hentage Gving	400
Western Michigan Christian High School Muskegon MI 49442	Matching Grants Directors gifts	3,075 9 000
West Point Military Academy West Point NY 10996	Matching Grants	450

White Plains-Dept Rec and Parks White Plains, NY 10602	Heritage Giving	300
Wolford, Ryan Fremont, MI 49412	Scholarship	1 500
Woodnck Institute Grand Rapids, MI 49505	Directors Gifts	1,000
Yosef ASU Foundation Boone, NC 28608	Matching Grants	450
Young, Kelly Holton, MI 49425	Scholarship	1,500
Zack, Susan Muskegon MI 49441	Heritage Giving	200
Zick, Karen Fremont, MI 49412	Heritage Giving	200
Zero To Three - Nat Center for Infant 734 15th St NW, Ste 1000, Washington DC 20005	Education & Training	15 000
Zietlow, Brian LaValle, WI 53941	Scholarship	1,500
Zonta Club of Newaygo County Area White Cloud, MI 49349	Heritage Giving	228
Zinnecker, Caitlin Fremont, MI 49412	Scholarship	<u>1 500</u>

TOTAL

4,017,746

990 PF  
Part XV  
Line 3b

**The Gerber Foundation**  
Federal ID # 38-6068090  
For the Year Ended December 31, 2001

Grants and Contributions Approved for Future Payments

Heritage Giving	\$ 50,000
Special Initiatives	<u>2,724,661</u>
Total Future Amounts Approved	<u>\$ 2,774,661</u>



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

▶ 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
- If you are filing for an Additional (not automatic) 3-Month Extension, complete only Part II (on page 2 of this form)

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

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

Note Form 990-T corporations requesting an automatic 6-month extension-check this box and complete Part I only   
 All other corporations (including Form 990-C filers) must use Form 7004 to request an extension of time to file income tax returns Partnerships, REMICs and trusts must use Form 8736 to request an extension of time to file Form 1065, 1066 or 1041

Type or print File by the due date for filing your return See instructions	Name of Exempt Organization <u>The Gerber Foundation</u>	Employer identification number <u>38-6068090</u>
	Number street, and room or suite no If a P O box see instructions <u>4747 West 48th Street 153</u>	
	City town or post office, state, and ZIP code For a foreign address see instructions <u>Fremont MI 49412</u>	

Check type of return to be filed (file a separate application for each return)

<input type="checkbox"/> Form 990	<input type="checkbox"/> Form 990-T (corporation)	<input type="checkbox"/> Form 4720
<input type="checkbox"/> Form 990-BL	<input type="checkbox"/> Form 990-T (sec 401(a) or 408(a) trust)	<input type="checkbox"/> Form 5227
<input type="checkbox"/> Form 990-EZ	<input type="checkbox"/> Form 990-T (trust other than above)	<input type="checkbox"/> Form 6069
<input checked="" type="checkbox"/> Form 990-PF	<input type="checkbox"/> Form 1041-A	<input type="checkbox"/> Form 8870

- 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 will cover

1 I request an automatic 3-month (6-month, for 990-T corporation) extension of time until 8/15/02 to file the exempt organization return for the organization named above The extension is for the organization's return for  
 ▶  calendar year 2001 or  
 ▶  tax year beginning \_\_\_\_\_ and ending \_\_\_\_\_

2 If this tax year 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 \$ 21,521

b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit \$ 40,804

c **Balance Due** Subtract line 3b from line 3a Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions \$ \_\_\_\_\_

**Signature and Verification**

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 ▶ John Korstang Title ▶ C.P.A. Date ▶ 5/14/02  
 For Paperwork Reduction Act Notice, See Instruction Form **8868** (12 2000)

COPY