**Caution:** Forms printed from within Adobe Acrobat Reader 5.0, with the "Shrink oversized pages to paper size" and "Expand small pages to paper size" options selected, may not meet IRS or state taxing agency specifications. If you plan to file a copy of the return printed from a PDF file, please uncheck the applicable options on the Adobe Acrobat Reader "Print" dialog.

# 2002 Tax Return(s)

Prepared for THE HAGEN FAMILY FOUNDATION

CLIENT CODE: 16628PF

Account Number 783984 Release Number 2002.05030

Prepared by PLANTE & MORAN, PLLC

2601 CAMBRIDGE CT., SUITE 500

AUBURN HILLS, MI

48326

248-375-7100

**Processing** Date: 04/15/2003

Time: 09:47:08

Special Instructions

Messages



### **Return Information**

#### CAUTION

Form: 9 Sheet: 1 Box: 50

• Form 990-PF. Page 12. The preparer's social security number and/or employer identification number have been forced to print by the entry on Interview Form 9, Box 50. According to official IRS instructions this information should only be completed when the organization is a Section 4947(a)(1) nonexempt charitable trust that is filing Form 990-PF in lieu of Form 1041. Please review this item accordingly. (21060)

#### MS WORD LETTERS

The following MS Word letters were created for this return:

Transmittal Letter

 The following MS Word letters did not print with this return because of the date/time stamp or because the letter no longer applies:

Transmittal Letter

# **Tax Return Carryovers to 2003**

NAME: THE	HAGEN FAMILY FOUNDATION			Number	er: 38-3482329			
Disallowing Form	Description	Originating Form	Entity/ Activity	St/ City	Amount			
990-PF	EXCESS DISTRIBUTIONS	990-PF			34,480.			

2002 Return Summary	
THE HAGEN FAMILY FOUNDATION	38-3482329
FORM 990-PF:	
TOTAL REVENUE TOTAL EXPENSES EXCESS <deficit> BEGINNING NET ASSETS CHANGES IN NET ASSETS ENDING NET ASSETS (PART III) NET INVESTMENT INCOME TAX ON INVESTMENT INCOME</deficit>	-223,354. 99,460. -322,814. 1,621,208. 0. 1,298,394. 0.
BALANCE SHEET ANALYSIS ENDING TOTAL ASSETS	1,298,394.
ENDING TOTAL LIABILITIES	0.
ENDING TOTAL NET ASSETS OR FUND BALANCES (PART II)	1,298,394.
ENDING TOTAL ASSETS MINUS LIABILITIES AND NET ASSETS NET ASSETS DIFFERENCE BETWEEN PART II AND PART III	0. 0.

MR. DAVID F. HAGEN
THE HAGEN FAMILY FOUNDATION
2760 NE 16TH STREET
FT. LAUDERDALE, FL 33304

#### DEAR DAVE:

ENCLOSED ARE THE ORIGINAL AND ONE COPY OF THE 2002 EXEMPT ORGANIZATION RETURN, AS FOLLOWS...

2002 FORM 990-PF

EACH ORIGINAL SHOULD BE DATED, SIGNED AND FILED IN ACCORDANCE WITH THE FILING INSTRUCTIONS. THE COPY SHOULD BE RETAINED FOR YOUR FILES.

WE SINCERELY APPRECIATE THE OPPORTUNITY TO SERVE YOU. PLEASE CONTACT US IF YOU HAVE ANY QUESTIONS CONCERNING THE TAX RETURN.

VERY TRULY YOURS,

PLANTE & MORAN, PLLC

## TAX RETURN FILING INSTRUCTIONS

FORM 990-PF

#### FOR THE YEAR ENDING

DECEMBER 31, 2002

Prepared for	MR. DAVID F. HAGEN THE HAGEN FAMILY FOUNDATION 2760 NE 16TH STREET FT. LAUDERDALE, FL 33304
Prepared by	PLANTE & MORAN, PLLC 2601 CAMBRIDGE CT., SUITE 500 AUBURN HILLS, MI 48326
Amount due or refund	NO AMOUNT IS DUE
Make check payable to	NO AMOUNT IS DUE.
Mail tax return and check (if applicable) to	INTERNAL REVENUE SERVICE CENTER OGDEN, UT 84201-0027
Return must be mailed on or before	MAY 15, 2003
Special Instructions	THE RETURN SHOULD BE SIGNED AND DATED.  A COPY OF THIS RETURN MUST ALSO BE SIGNED, DATED AND FILED WITH THE MICHIGAN DEPARTMENT OF ATTORNEY GENERAL. AN ADDRESSED ENVELOPE IS ENCLOSED FOR YOUR CONVENIENCE.  AN ADDITIONAL COPY OF THIS RETURN MUST ALSO BE SIGNED, DATED AND FILED WITH THE FLORIDA DEPARTMENT OF ATTORNEY GENERAL. AN ADDRESSED ENVELOPE IS INCLUDED FOR YOUR CONVENIENCE.  WE RECOMMEND THAT YOU USE CERTIFIED MAIL WITH POSTMARKED RECEIPTS FOR PROOF OF TIMELY FILING. ADDITIONAL POSTAGE WILL BE REQUIRED.

#### Form **990-PF**

Department of the Treasury

### Return of Private Foundation

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

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

**2002** 

OMB No. 1545-0052

For calendar year 2002, or tax year beginning and ending **G** Check all that apply: 0 Initial return Final return Amended return X Address change 0 Name change Name of organization A Employer identification number Use the IRS label. Otherwise, THE HAGEN FAMILY FOUNDATION 38-3482329 print Number and street (or P.O. box number if mail is not delivered to street address) Room/suite **B** Telephone number or type. 2760 NE 16TH STREET (954) - 561 - 1580See Specific City or town, state, and ZIP code C If exemption application is pending, check here Instructions. FT. LAUDERDALE, **D** 1. Foreign organizations, check here 33304 2. Foreign organizations meeting the 85% test, check here and attach computation ..... **H** Check type of organization:  $\bigcirc X$  Section 501(c)(3) exempt private foundation Section 4947(a)(1) nonexempt charitable trust  $\bigcirc$ Other taxable private foundation E If private foundation status was terminated I Fair market value of all assets at end of year  $\mathbf{J}$  Accounting method:  $\bigcirc \mathbf{X}$  Cash Accrual under section 507(b)(1)(A), check here (from Part II, col. (c), line 16) Other (specify) F If the foundation is in a 60-month termination 1,177,648. (Part I, column (d) must be on cash basis.) under section 507(b)(1)(B), check here ... Analysis of Revenue and Expenses (d) Disbursements (a) Revenue and (c) Adjusted net (b) Net investment (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).) charitable purposes (cash basis only) expenses per books income income N/A Contributions, gifts, grants, etc., received Check X if the foundation is not required to attach Sch. B Distributions from split-interest trusts Interest on savings and temporary cash investments 24,880. 24,880. STATEMENT Dividends and interest from securities **5a** Gross rents b (Net rental income or (loss) 6a Net gain or (loss) from sale of assets not on line 10.

b Gross sales price for all 916 STATEMENT 1 -248,234. 916,292. 7 Capital gain net income (from Part IV, line 2) 0. 8 Net short-term capital gain Income modifications ... 10a Gross sales less returns and allowances ....... **b** Less: Cost of goods sold ... c Gross profit or (loss) 11 Other income Total. Add lines 1 through 11 -223,354. 24,880 0. Compensation of officers, directors, trustees, etc. 13 Other employee salaries and wages 14 15 Pension plans, employee benefits ..... 16a Legal fees 2,060. 1,030. **b** Accounting fees STMT 3 1,030. c Other professional fees 17 Interest 135. 35. 0. 19 Depreciation and depletion 20 Occupancy 619. 309 310. 21 Travel, conferences, and meetings 22 Printing and publications ..... 189. 23 Other expenses STMT 5 26,646. 26,457. 24 Total operating and administrative 29,460 expenses. Add lines 13 through 23 27,831. 1,529. 70,000. 25 Contributions, gifts, grants paid 70,000. 26 Total expenses and disbursements. 99,460. 27,831 71,529. Add lines 24 and 25 27 Subtract line 26 from line 12: -322,814 a Excess of revenue over expenses and disbursements 0. **b Net investment income** (if negative, enter -0-) c Adjusted net income (if negative, enter -0-) N/A

LHA For Paperwork Reduction Act Notice, see the instructions.

П	ort	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only.	Beginning of year	End of	year
P	art	column should be for end-of-year amounts only.	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	115,089.	55,474.	55,474.
		Savings and temporary cash investments	,		
		Accounts receivable ►			
	-	Less; allowance for doubtful accounts ▶			
	4	Pledges receivable ►			
	l	Less; allowance for doubtful accounts			
	5	Grants receivable			
		Receivables due from officers, directors, trustees, and other			
	ľ				
	,	disqualified persons			
	′	Other notes and loans receivable			
	_	Less: allowance for doubtful accounts			
ssets		Inventories for sale or use			
Ass		Prepaid expenses and deferred charges	100 201	02 740	06 400
•		Investments - U.S. and state government obligations STMT 6	102,391.		
		Investments - corporate stock STMT 7	1,403,728.	1,149,180.	1,025,774.
	C	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment: basis			
		Less: accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other			
	14	Land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation			
	15	Other assets (describe ► )			
	16	Total assets (to be completed by all filers)	1,621,208.	1,298,394.	1,177,648.
		Accounts payable and accrued expenses			
		Grants payable			
Ś		Deferred revenue			
Liabilities		Loans from officers, directors, trustees, and other disqualified persons			
abi		Mortgages and other notes payable			
Ë		Other liabilities (describe )			
	23	Total liabilities (add lines 17 through 22)	0.	0.	
_		Organizations that follow SFAS 117, check here	•		
		and complete lines 24 through 26 and lines 30 and 31.			
es	24	Unrestricted			
anc	25	Temporarily restricted			
3ak		Permanently restricted			
Net Assets or Fund Balance	20	Organizations that do not follow SFAS 117, check here			
Ī		and complete lines 27 through 31.			
ō	27	Capital stock, trust principal, or current funds	0.	0.	
ets		Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
\SS		Retained earnings, accumulated income, endowment, or other funds	1,621,208.	1,298,394.	
et/	29		1,621,208.	1,298,394.	
ž	30	Total net assets or fund balances	1,021,200.	1,230,334.	
	٠,	Takel Bakilikian and not as at Hond balance	1 601 000	1 200 204	
_	31	Total liabilities and net assets/fund balances	1,621,208.	1,298,394.	
P	art	Analysis of Changes in Net Assets or Fund Ba	alances		
1	Total	net assets or fund balances at beginning of year - Part II, column (a), line	30		
	(mus	st agree with end-of-year figure reported on prior year's return)		1	1,621,208.
2		amount from Part I, line 27a			-322,814.
		u to a conservation to a to		0	0.
		lines 1, 2, and 3			1,298,394.
5	Decr	eases not included in line 2 (itemize)		5	0.
6	Total	net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	lumn (b), line 30	6	1,298,394.

F	Part IV   Capital Gains and	Losses for Tax on Ir	nvestmen	t Income					
	(a) List and describe the 2-story brick warehou	ne kind(s) of property sold (e.g use; or common stock, 200 sh	., real estate, s. MLC Co.)		( <b>b)</b> H	How acquired - Purchase - Donation		ate acquired o., day, yr.)	(d) Date sold (mo., day, yr.)
18									
_	b SEE ATTACHED ST	LATEMENT.							
_	c d								
_	e								
_	(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale				<b>h)</b> Gain or (loss plus (f) minus	
	a								
_	b								
_	C								
_	d e 916,292.			1,164,52	26				-248,234.
_	e 916,292. Complete only for assets showing gai	n in column (h) and owned by					(I) Gain	s (Col. (h) gain	-
_	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	( <b>k</b> ) E>	cess of col. (i)		(	col. (k), t	out not less that ses (from col. (	n -0-) <b>or</b>
_	a								
Ī	b								
_	С								
_	d								
_	e								-248,234.
2	Capital gain net income or (net capital l	oss). { If gain, also enter oss), enter -0	r in Part I, line - in Part I, line	<sup>7</sup> <sub>7</sub> }		2			-248,234.
3	Net short-term capital gain or (loss) as If gain, also enter in Part I, line 8, colun If (loss), enter -0- in Part I, line 8		nd (6):		}	3		N/A	
П	Part V   Qualification Unde	er Section 4940(e) for	Reduced	Tax on Net	· Inv		ncom		<u>'</u>
_	or optional use by domestic private foun							-	
•			10 10(u) u.x 01			-,			
I†	section 4940(d)(2) applies, leave this pa	rt blank.							
W	as the organization liable for the section	4942 tax on the distributable a	mount of any	year in the base p	eriod	·			.⊘ Yes ⊘ <b>X</b> No
	"Yes," the organization does not qualify u								
1	Enter the appropriate amount in each of	column for each year; see instr	uctions before	e making any entri	es.				(d)
	(a) Base period years	(b) Adjusted qualifying dis	trihutions	Net value of no	(c)	itahla-uea aeea	ıte		(d) oution ratio
_	Calendar year (or tax year beginning in) 2001		2,684.			,536,83			vided by col. (c)) • 0733221
_	2001	3	8,508.			787,81			.0488796
_	1999		1,953.			593,25			.0032920
_	1998		<u> </u>			333723			- 10032320
_	1997								
		<b>'</b>		•					
2	Total of line 1, column (d)						:	2	.1254937
	Average distribution ratio for the 5-yea	r base period - divide the total o	on line 2 by 5,	or by the number	of ye	ars			
	the foundation has been in existence if	less than 5 years					;	3	.0418312
4	Enter the net value of noncharitable-us	e assets for 2002 from Part X,	line 5					4	1,353,427.
5	Multiply line 4 by line 3							5	56,615.
6	Enter 1% of net investment income (19	% of Part I, line 27b)						6	0.
7	Add lines 5 and 6							7	56,615.
8	Enter qualifying distributions from Part	XII, line 4						8	71,529.
	If line 8 is equal to or greater than line.							,	-

Pa	rt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4940(c)	48 - see	instru	ıctio	ns)
1a	Exempt operating foundations described in section 4940(d)(2), check here 🔪 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 ►⊘X and enter 1%	1			0.
	of Part I, line 27b				
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			0.
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			0.
6	Credits/Payments:				
	2002 estimated tax payments and 2001 overpayment credited to 2002 6a 6a				
b	Exempt foreign organizations - tax withheld at source				
	Tax paid with application for extension of time to file (Form 8868) 6c				
	Backup withholding erroneously withheld 6d				
	Total credits and payments. Add lines 6a through 6d	7			0.
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here if Form 2220 is attached	8			
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9			0.
10	· · · · · · · · · · · · · · · · · · ·	10			
	ŗ	11			
	rt VII-A Statements Regarding Activities				
1a	During the tax year, did the organization attempt to influence any national, state, or local legislation or did it participate or intervene is			Yes	
	any political campaign?		1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?		1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published	ed or			
	distributed by the organization in connection with the activities.				
	Did the organization file Form 1120-POL for this year?		1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:				
	(1) On the organization. $\blacktriangleright$ \$ (2) On organization managers. $\blacktriangleright$ \$				
е	Enter the reimbursement (if any) paid by the organization during the year for political expenditure tax imposed on organization				
	managers. ▶ \$0 .				
2	Has the organization engaged in any activities that have not previously been reported to the IRS?		2		X
	If "Yes," attach a detailed description of the activities.				
3	Has the organization made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or				
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		X
	Did the organization have unrelated business gross income of \$1,000 or more during the year?		4a		Х
	If "Yes," has it filed a tax return on Form 990-T for this year?		4b		77
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		X
	If "Yes," attach the statement required by General Instruction T.				
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:				
	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 la			37	
_	remain in the governing instrument?		6	X	
7	Did the organization have at least \$5,000 in assets at any time during the year?		7	Х	
0	If "Yes," complete Part II, col. (c), and Part XV.				
ва	Enter the states to which the foundation reports or with which it is registered (see instructions)				
	MICHIGAN, FLORIDA				
D	If the answer is "Yes" to line 7, has the organization furnished a copy of Form 990-PF to the Attorney General (or designate)		8b	Х	
0	of each state as required by General Instruction G? <i>If "No," attach explanation</i> Is the organization claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for caler		OD	Λ	
J	year 2002 or the taxable year beginning in 2002 (see instructions for Part XIV)? If "Yes," complete Part XIV		9		х
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.		10		X
	Did the organization comply with the public inspection requirements for its annual returns and exemption application?		11	Х	<u> </u>
• • •	Web site address ► WWW.HAGENFAMILYFOUNDATION.ORG				
19	The books are in care of MR. DAVID HAGEN  Telephone no.	(954)	561-	158	0
12		(10 ± 7) (1P+4 ►3)			
13	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here	· · ·			·Ø
	and enter the amount of tax-exempt interest received or accrued during the year			/A	J
22353 01-23	31				(2002)

Part VII-B	Statements Regarding Activities for Which Form 4720 May Be Require	d					
File Form	4720 if any item is checked in the "Yes" column, unless an exception applies.					Yes	No
1a During the	year did the organization (either directly or indirectly):						
(1) Engag	e in the sale or exchange, or leasing of property with a disqualified person?	O	Yes $\oslash$ X	No			
(2) Borrov	v money from, lend money to, or otherwise extend credit to (or accept it from)						
	ıalified person?	<b>O</b>	Yes ⊘X	No			
(3) Furnis	h goods, services, or facilities to (or accept them from) a disqualified person?	<b>O</b>	Yes ⊘X	No			
(4) Pay co	mpensation to, or pay or reimburse the expenses of, a disqualified person?	ØX	Yes 🕢	No			
` '	er any income or assets to a disqualified person (or make any of either available						
for the	benefit or use of a disqualified person)?	<b>O</b>	Yes ⊘X	No			
(6) Agree	to pay money or property to a government official? (Exception. Check "No"						
if the o	organization agreed to make a grant to or to employ the official for a period after						
termin	ation of government service, if terminating within 90 days.)	<b>O</b>	Yes ⊘X	No			
<b>b</b> If any answ	ver is "Yes" to 1a(1)-(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations						
section 53.	4941(d)-3 or in a current notice regarding disaster assistance (see page 19 of the instructions)?				1b		Х
Organizatio	ns relying on a current notice regarding disaster assistance check here			ð [			
<b>c</b> Did the org	anization engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not co	rrecte	d				
before the	first day of the tax year beginning in 2002?				1c		Х
	tilure to distribute income (section 4942) (does not apply for years the organization was a private operating						
defined in	section 4942(j)(3) or 4942(j)(5)):						
a At the end	of tax year 2002, did the organization have any undistributed income (lines 6d and 6e, Part XIII) for tax year	(s) beg	jinning				
before 200	2?	<b>O</b>	Yes ⊘X	No			
If "Yes," list	the years $\blacktriangleright$ , , , , ,						
<b>b</b> Are there a	the years \( \bigsim \),,,,,,	to inco	orrect				
valuation o	f assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No"	and at	tach				
statement -	see instructions.)		N	/A	2b		
	sions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here.						
▶	anization hold more than a 2% direct or indirect interest in any business enterprise at any time						
3a Did the org	anization hold more than a 2% direct or indirect interest in any business enterprise at any time						
during the	year?	<b>O</b>	Yes ⊘X	No			
<b>b</b> If "Yes," did	it have excess business holdings in 2002 as a result of (1) any purchase by the organization or disqualified	perso	ns after				
May 26, 19	69; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(	c)(7)) 1	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 Sc	hedul	le C,				
	0, to determine if the organization had excess business holdings in 2002.)				3b		
<b>4a</b> Did the org	anization invest during the year any amount in a manner that would jeopardize its charitable purposes? $$				4a		Х
<b>b</b> Did the org	anization make any investment in a prior year (but after December 31, 1969) that could jeopardize its charita	able pu	rpose that				
had not be	en removed from jeopardy before the first day of the tax year beginning in 2002?				4b		X
	year did the organization pay or incur any amount to:						
<b>(1)</b> Carry	on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<b>O</b>	Yes ⊘X	No			
(2) Influer	ice the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly,						
	ter registration drive?		Yes ⊘X				
(3) Provid	e a grant to an individual for travel, study, or other similar purposes?	O	Yes ⊘X	No			
	e a grant to an organization other than a charitable, etc., organization described in section						
	(1), (2), or (3), or section 4940(d)(2)?	O	Yes ⊘X	No			
(5) Provid	e for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for						
	evention of cruelty to children or animals?		Yes $\oslash X$	No			
	ver is "Yes" to 5a(1)-(5), did <b>any</b> of the transactions fail to qualify under the exceptions described in Regulation						
	4945 or in a current notice regarding disaster assistance (see instructions)?				5b		
	ns relying on a current notice regarding disaster assistance check here			0			
	er is "Yes" to question 5a(4), does the organization claim exemption from the tax because it maintained						
expenditur	e responsibility for the grant? ${ m N/A}$	<b>O</b>	Yes 🕢	No			
If "Yes," a	ttach the statement required by Regulations section 53.4945-5(d).						
	anization, during the year, receive any funds, directly or indirectly, to pay premiums on						
	benefit contract?		Yes ⊘X				
	anization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?				6b		X
If you ans	wered "Yes" to 6b, also file Form 8870.						

Part VIII Information About Officers, Directors, True Paid Employees, and Contractors	stees, Foundation Ma	anagers, Highl	у	Page <b>6</b>
1 List all officers, directors, trustees, foundation managers and the				
(a) Name and address	<b>(b)</b> Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 8		0.	0.	0.
SEE STATEMENT 0		0.	0.	0.
Compensation of five highest-paid employees (other than those in		, 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  3 Five highest-paid independent contractors for professional service.	and If none onto INONE		<b>&gt;</b>	0
(a) Name and address of each person paid more than \$50,00		(b) Type of serv	vice	(c) Compensation
NONE		( ) 31		. , ,
Total number of others receiving over \$50,000 for professional services  Part IX-A   Summary of Direct Charitable Activities			<b>&gt;</b>	0
List the foundation's four largest direct charitable activities during the tax year. In number of organizations and other beneficiaries served, conferences convened,	nclude relevant statistical inform research papers produced, etc.	ation such as the	Е	xpenses
1 N/A				
2				
3				
4				
223551 01-23-03			Form	990-PF (2002)

### Part IX-B Summary of Program-Related Investments

_	artix D		
D	escribe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.		Amount
1	N/A		
2			
_			1
_			1
Al	l other program-related investments. See instructions.		
3			
_			1
То	tal. Add lines 1 through 3	<b>&gt;</b>	0.
P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign fou	ndations,	see instructions.)
$\frac{-}{1}$	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
-	Average monthly fair market value of securities	1a	1 241 185.
		1b	1,241,185. 132,853.
	•	1c	132,033.
d	Fair market value of all other assets  Total (add lines 1a, b, and c)	1d	1,374,038.
	Reduction claimed for blockage or other factors reported on lines 1a and	iu i	1,371,0301
٠	1c (attach detailed explanation) 1e   0 •		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,374,038.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	20,611.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,353,427.
6	Minimum investment return. Enter 5% of line 5	6	67,671.
	Distributable Amount (see instructions) (Section 4042(i)/2) and (i)/E) private approxing foundations of		. , ,
Р	foreign organizations check here $\blacktriangleright \bigcirc$ and do not complete this part.)		
1	Minimum investment return from Part X, line 6	1	67,671.
2a	Tax on investment income for 2002 from Part VI, line 5 <b>2a</b>		
	Income tax for 2002. (This does not include the tax from Part VI.)		
	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	67,671.
4 a	Recoveries of amounts treated as qualifying distributions 4a 0.		
b	Income distributions from section 4947(a)(2) trusts 4b 0 •		
C	Add lines 4a and 4b	4c	0.
5	Add lines 3 and 4c	5	67,671.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	67,671.
P	art XII Qualifying Distributions (see instructions)		
$\frac{-}{1}$	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
·		1a	71,529.
b		1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	0.11.1111	3a	
b	* · · · · · · · · · · · · · · · · · · ·	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	71,529.
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	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	71,529.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the	foundat	ion qualifies for the section
	4940(e) reduction of tax in those years.		

### Part XIII Undistributed Income (see instructions)

	(-)	/L\	(-)	(4)
	<b>(a)</b> Corpus	(b) Years prior to 2001	<b>(c)</b> 2001	( <b>d)</b> 2002
1 Distributable amount	оограо	1 out o prior to 2001	2001	2002
for 2002 from Part XI, line 7				67,671.
2 Undistributed income, if any, as of the end of 2001:				07,707.20
<b>a</b> Enter amount for 2001 only			0.	
<b>b</b> Total for prior years:				
, , ,		0.		
3 Excess distributions carryover, if any, to 2002:				
<b>a</b> From 1997				
<b>b</b> From 1998				
<b>c</b> From 1999				
<b>d</b> From 2000				
e From 2001 30,622.				
f Total of lines 3a through e	30,622.			
4 Qualifying distributions for 2002 from				
Part XII, line 4: $\triangleright$ \$ 71,529.				
<b>a</b> Applied to 2001, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior				
years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus				
(Election required - see instructions)	0.			
<b>d</b> Applied to 2002 distributable amount				67,671.
e Remaining amount distributed out of corpus	3,858.			
5 Excess distributions carryover applied to 2002 (If an amount appears in column (d), the same amount	0.			0.
must be shown in column (a).)  6 Enter the net total of each column as				
indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	34,480.			
<b>b</b> Prior years' undistributed income. Subtract				
line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of				
deficiency has been issued, or on which				
the section 4942(a) tax has been previously		0		
assessed		0.		
<b>d</b> Subtract line 6c from line 6b. Taxable		0.		
amount - see instructions		0.		
e Undistributed income for 2001. Subtract line			0.	
4a from line 2a. Taxable amount - see instr  f Undistributed income for 2002. Subtract			0.	
lines 4d and 5 from line 1. This amount must				
be distributed in 2003				0.
7 Amounts treated as distributions out of				0.
corpus to satisfy requirements imposed by				
section 170(b)(1)(E) or 4942(g)(3)	0.			
8 Excess distributions carryover from 1997				
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2003.				
Subtract lines 7 and 8 from line 6a	34,480.			
10 Analysis of line 9:	2 - 1 - 2 • •			
<b>a</b> Excess from 1998				
<b>b</b> Excess from 1999				
c Excess from 2000				
d Excess from 2001 30,622.				
e Excess from 2002 3,858.				

Part XIV   Private Operating F	oundations (see in:	structions and Part VI	I-A, question 9)	N/A	
1 a If the foundation has received a ruling o	r determination letter that	it is a private operating			
foundation, and the ruling is effective fo	r 2002, enter the date of t	he ruling			
<b>b</b> Check box to indicate whether the organ				4942(j)(3) or Ø 49	942(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years	.,,,	
income from Part I or the minimum	(a) 2002	<b>(b)</b> 2001	(c) 2000	(d) 1999	(e) Total
investment return from Part X for					
each year listed					
<b>b</b> 85% of line 2a					
c Qualifying distributions from Part XII,					
line 4 for each year listed					
<b>d</b> 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					
<b>3</b> Complete 3a, b, or c for the					
alternative test relied upon:					
<ul><li>a "Assets" alternative test - enter:</li><li>(1) Value of all assets</li></ul>					
(2) Value of assets qualifying					
under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test - Enter 2/3 of minimum investment return					
shown in Part X, line 6 for each year					
listed					
c "Support" alternative test - enter:					
(1) Total support other than gross					
investment income (interest, dividends, rents, payments on					
securities loans (section					
512(a)(5)), or royalties)					
(2) Support from general public					
and 5 or more exempt organizations as provided in					
section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from					
an exempt organization					
(4) Gross investment income					
Part XV   Supplementary Info				on had \$5,000 or	more in assets
at any time during t	he year-see page	e 25 of the instru	ıctions.)		
1 Information Regarding Foundation	n Managers:				
a List any managers of the foundation wh			tributions received by the	e foundation before the clo	se of any tax
year (but only if they have contributed n	iore than \$5,000). (See s	ection 507(d)(2).)			
SEE STATEMENT 9					
<b>b</b> List any managers of the foundation wh			(or an equally large porti	on of the ownership of a p	artnership or
other entity) of which the foundation has	s a 10% or greater interes	st.			
NONE					
2 Information Regarding Contributi	on, Grant, Gift, Loan,	Scholarship, etc., P	rograms:		
Check here $\blacktriangleright \oslash X$ if the organization	only makes contributions	to preselected charitable	le organizations and does	s not accept unsolicited re	quests for funds. If
the organization makes gifts, grants, etc	. (see instructions) to ind	ividuals or organizations	under other conditions,	complete items 2a, b, c, a	nd d.
a The name, address, and telephone num	ber of the person to whor	n applications should be	addressed:		
<b>b</b> The form in which applications should b	e submitted and informat	tion and materials they s	hould include:		
c Any submission deadlines:					
-					
d Any restrictions or limitations on awards	s such as by geographic:	al areas, charitable fields	kinds of institutions or	other factors:	

3 Grants and Contributions Paid During the	rear or Approved for Future	rayınent İ		
Recipient  Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year	or substantial contributor	Todiplont		
a raid daring the year				
SEE STATEMENT 10				
Total			<b>▶</b> 3a	70,000
<b>b</b> Approved for future payment				
NONE				
Total			<b>▶</b> 3b	0

### Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income			ded by section 512, 513, or 514	(e)
	(a) Business	(b)	(C) Exclu-	(d)	Related or exempt
1 Program service revenue:	code	Amount	sion code	Amount	function income
a					
b					
С					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	24,880.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
<b>b</b> Not debt-financed property					
6 Net rental income or (loss) from personal					
property					
7 Other investment income					
8 Gain or (loss) from sales of assets other					
than inventory			18	-248,234.	
9 Net income or (loss) from special events			<del> </del>		
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0		-223,354.	0.
13 Total. Add line 12, columns (b), (d), and (e)					-223,354.
(See worksheet in line 13 instructions to verify calculations.)					220,0010
(200 montested in line to mode dediction to voring deliculations.)					

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

<b>▼</b>	the organization's exempt purposes (other than by providing funds for such purposes).

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

1	Did th	e organization directly or indi	rectly engage	in any of the following with a	any other organ	ization described in	section 501(c) of		Yes	No
	the Co	ode (other than section 501(c)	)(3) organizati	ons) or in section 527, relat	ing to political o	organizations?				
á	Trans	fers from the reporting organi	zation to a no	ncharitable exempt organiza	ation of:					
	<b>(1)</b> C	ash						1a(1)		X
										X
t	Other	Transactions:								
	(1) S	ales of assets to a noncharita	ble exempt or	ganization				1b(1)		X
	<b>(2)</b> P	urchases of assets from a no	ncharitable ex	empt organization				1b(2)		X
	( <b>3</b> ) F	ental of facilities, equipment,	or other asset	S				1b(3)		X
	( <b>4</b> ) F	eimbursement arrangements						1b(4)		X
	(5) L	oans or loan guarantees						1b(5)		X
	( <b>6</b> ) P	erformance of services or me	mbership or f	undraising solicitations				1b(6)		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees										X
(		•		-		-	fair market value of the goods,			
			-	-	ess than fair mar	rket value in any trar	nsaction or sharing arrangemer	ıt, show i	n	
		nn (d) the value of the goods,								
(a)	Line no.	( <b>b</b> ) Amount involved	(c) Name	e of noncharitable exempt or	rganization	(d) Description of	f transfers, transactions, and sh	aring arr	angem	ents
				N/A						
_										
_										
_										
_										
_										
_										
_										
_	lo tho	organization directly or indire	othy offiliated y	with arrelated to one or me	ara tay ayamat i	argani <del>z</del> ationa dagari	had			
28		organization directly or indire						Vaa	ΟX	Na
,		s," complete the following sch		30 I(c)(3)) or iii section 327	·		Ø	res	()2 <u>1</u>	NO
	) II IG	(a) Name of organization	cuule.	<b>(b)</b> Type of orga	anization		(c) Description of relations	hin		
_		(a) Name of organization		N/A			(c) Description of relations	шр		
_				14/21						
						+				
_										
$\neg$	Under p	enalties of perjury, I declare that I h	ave examined th	L nis return, including accompanyir	ng schedules and s	statements, and to the b	est of my knowledge and belief, it is	true, corre	ct,	
	and con	plete. Declaration of preparer (other	r than taxpayer	or fiduciary) is based on all inform	nation of which pre	eparer has any knowled	ge.			
ě	Si	gnature of officer or trustee			Date	Title				
Sign Here		Preparer's				Date		er's SSN o	r PTIN	
ğ	r's Jr	signature					self- employed ►⊘			
رح	Paid eparer' Ise Only	Firm's name (or yours PLAN	TE & M	ORAN, PLLC		1	EIN ▶ 38-135	7951		
	Paid Preparer's Use Only	if self-employed), 2601	CAMBR	IDGE CT., SU	ITE 500					
	4	address, and ZIP code AUBU	RN HIL	IDGE CT., SU LS, MI 4832	6		Phone no. 248-	375-	710	0
_								Form 99	90-PF	(2002)
										•

CONTINUATION FOR 990-PF, PART IV 38-3482329 THE HAGEN FAMILY FOUNDATION PAGE 1 Capital Gains and Losses for Tax on Investment Income Part IV (b) How acquired P - Purchase (a) List and describe the kind(s) of property sold, e.g., real estate, (c) Date acquired (d) Date sold 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo., day, yr.) (mó., day, yr.) D - Donation LYNCH #619-04304 P VARIOUS VARIOUS 1a MERRILL b MERRILL LYNCH #619-04304 Ρ VARIOUS VARIOUS c MERRILL LYNCH #619-04303 P VARIOUS VARIOUS d MERRILL LYNCH #619-04303 P VARIOUS VARIOUS e MERRILL LYNCH #619-04289 P VARIOUS VARIOUS f MERRILL LYNCH #619-04289 P VARIOUS VARIOUS g MERRILL LYNCH #619-04290 P VARIOUS VARIOUS h MERRILL LYNCH #619-04290 P VARIOUS VARIOUS k ı m n 0 (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss) (e) Gross sales price (or allowable) plus expense of sale (e) plus (f) minus (g) 73,691 96,383 -22,692. a 92,133141,612 -49,479. b 29,099. -9,290.38,389 С 8,217. 11,553 -3,336. d 23,175. 38,418. -15,243. е 125,192-34,674. 159,866  $3\overline{60,167}$ 434,110 -73,943. g -39,577.204,618. 244,195 h m n 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (j) Adjusted basis (k) Excess of col. (i) (i) F.M.V. as of 12/31/69 but not less than "-0-") as of 12/31/69 over col. (j), if any -22,692.-49,479. b -9,290. С -3,336. d -15,243. е -34,674f -73,943. g -39,577. h

_					
Ι					
m					
n					
0					
2	Capital gain net income or (net ca	apital loss) { If gain, also enter	2	-248,234.	
3	Net short-term capital gain or (los If gain, also enter in Part I, line 8, If (loss), enter "-0-" in Part I, line 8		3	N/A	

FORM 99	0-PF G	AIN OR (LOSS) F	ROM SALE	OF Z	ASSETS	S	TATEMENT 1
DESCRIP	(A) TION OF PROPERTY	<del>.</del>			MANNER CQUIRED	DATE ACQUIRE	D DATE SOLD
MERRILL	LYNCH #619-0430	4		PU	RCHASED	VARIOUS	VARIOUS
	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE SALE	OF	(E)	C. GA	(F) IN OR LOSS
	73,691.	96,383.		0.		0.	-22,692.
DESCRIP	(A) TION OF PROPERTY	•			MANNER CQUIRED	DATE ACQUIRE	D DATE SOLD
MERRILL	LYNCH #619-0430	4		PU	RCHASED	VARIOUS	VARIOUS
	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE SALE	OF	(E)	C. GA	(F) IN OR LOSS
	92,133.	141,612.		0.		0.	-49,479.
DESCRIP	(A) TION OF PROPERTY	•			MANNER CQUIRED	DATE ACQUIRE	D DATE SOLD
MERRILL	LYNCH #619-0430	13		PU	RCHASED	VARIOUS	VARIOUS
	(B) GROSS	(C) COST OR	(D) EXPENSE	OF	(E)		(F)
	SALES PRICE	OTHER BASIS	SALE		DEPRE	C. GA	IN OR LOSS
	29,099.	38,389.		0.		0.	-9,290.

DESCRIPTI	(A) ON OF PROPERTY				MANNER CQUIRED	DATE ACQUIRED	DATE SOLD
MERRILL L	YNCH #619-0430	3		PU	RCHASED	VARIOUS	VARIOUS
	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE SALE	OF	(E) DEPRE	C GAT	(F) N OR LOSS
	8,217.	11,553.		0.	—————	0.	-3,336.
DESCRIPTI	(A) ON OF PROPERTY	_			MANNER CQUIRED	DATE ACQUIRED	DATE SOLD
MERRILL L	YNCH #619-0428	9		PU	RCHASED	VARIOUS	VARIOUS
	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE SALE	OF	(E) DEPRE	C. GAI	(F) N OR LOSS
	23,175.	38,418.		0.		0.	-15,243.
DESCRIPTI	(A) ON OF PROPERTY				MANNER CQUIRED	DATE ACQUIRED	DATE SOLD
MERRILL L	YNCH #619-0428	9		PU	RCHASED	VARIOUS	VARIOUS
	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE SALE	OF	(E) DEPRE	C. GAI	(F) N OR LOSS
	125,192.	159,866.		0.		0.	-34,674.
DESCRIPTI	(A) ON OF PROPERTY				MANNER CQUIRED	DATE ACQUIRED	DATE SOLD
MERRILL L	YNCH #619-0429	0		PU	RCHASED	VARIOUS	VARIOUS
	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE SALE	OF	(E) DEPRE	C. GAI	(F) N OR LOSS
	360,167.	434,110.		0.		0.	-73,943.

(A) DESCRIPTION OF PROPERTY					MANNER ACQUIRED		TE IRED	DATE SO	DLD
MERRILL LYNCH #619-04290				PURCHASED VAR			IOUS VARIOUS		
(B)	(C) COST OR			0.11	(E)		(F)		
	HER BASIS	E.	XPENSE ( SALE	OF	DEPRE	c.	GAIN	OR LOSS	5
204,618.	244,195	5.		0.		0.		-39,57	77.
CAPITAL GAINS DIVIDENDS FR	CAPITAL GAINS DIVIDENDS FROM PART IV 0.								
TOTAL TO FORM 990-PF, PART	I, LINE 6	бA				;		-248,23	34.
FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2									
SOURCE	C	GROSS	AMOUNT		PITAL DIVIDE		c c	OLUMN (A) AMOUNT	)
LESS: ACCRUED INTEREST PAI MERRILL LYNCH	D	-691 25,571			_				
TOTAL TO FM 990-PF, PART I	, LN 4		24,880.			0.	. 24,880.		
FORM 990-PF	ACCO	ITMUC	NG FEES				STA	ATEMENT	3
	(A)	-	(B	) VEST-		(C) JUSTE	:D	(D) CHARITAE	
DESCRIPTION	EXPENS PER BO				NET	INCO	ME	PURPOSE	
DESCRIPTION	PER BO		MENT I				)ME 		ES 

FORM 990-PF	TAX	ES 		STATEMENT		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVE MENT INC		(C) ADJUSTED NET INCOM		
FEDERAL EXCISE TAX FOREIGN TAXES WITHHELD	100. 35.		0. 35.		0	
TO FORM 990-PF, PG 1, LN 18	135.		35.		0	
FORM 990-PF	OTHER E	XPENSES			STATEMENT	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVE MENT INC		(C) ADJUSTED NET INCOM		
INVESTMENT FEES WEB SITE FEES	26,267. 379.		267. 190.		0 189	
TO FORM 990-PF, PG 1, LN 23	26,646.	26,	457.			
FORM 990-PF U.S. AND	STATE/CITY G	OVERNMENT	OBL	IGATIONS	STATEMENT	
DESCRIPTION	U.S GOV'		вос	OK VALUE	FAIR MARKET VALUE	
MERRILL LYNCH A/C #619-04289 ATTACHED STATEMENT	- SEE X			93,740.	96,400	
TOTAL U.S. GOVERNMENT OBLIGA	TIONS			93,740.	96,400	
TOTAL STATE AND MUNICIPAL GO	VERNMENT OBL	IGATIONS				
TOTAL TO FORM 990-PF, PART I	I, LINE 10A	•		93,740.	96,400	

FORM 990-PF (	CORPORATE STOCK		STAT	EMENT 7
DESCRIPTION		BOOK VALUE		MARKET ALUE
MERRILL LYNCH A/C #619-04289 - SE STATEMENT MERRILL LYNCH A/C #619-04290 - SE STATEMENT		290,33 527,40		238,376. 503,406.
MERRILL LYNCH A/C #619-04303 MERRILL LYNCH A/C #619-04304 - SE STATEMENT	EE ATTACHED	331,44		283,992.
TOTAL TO FORM 990-PF, PART II, LINE 10B 1,149,180.				,025,774.
TRUSTEES ANI	ST OF OFFICERS, D D FOUNDATION MANA TITLE AND	COMPEN-	EMPLOYEE BEN PLAN	EXPENSE
NAME AND ADDRESS	AVRG HRS/WK	SATION	CONTRIB	ACCOUNT
DAVID F. HAGEN 2760 NE 16TH STREET FT. LAUDERDALE, FL 33304	PRESIDENT 0.	0.	0.	0.
VIRGINIA L. HAGEN 2760 NE 16TH STREET FT. LAUDERDALE, FL 33304	V.P./TREASURER 0.	/SECRETARY 0.	0.	0.
ANDREW HAGEN 3 HICKORY OAKS COURT BOLINGBROOK, IL 60440	DIRECTOR 0.	0.	0.	0.
PATRICIA BORN 2238 CLOVERFIELD SANTA MONICA, CA 90405	DIRECTOR 0.	0.	0.	0.
LAURA HAGEN 620 JUNIPERO LONG BEACH, CA 90814	DIRECTOR 0.	0.	0.	0.
SUSAN HAGEN 3 HICKORY OAKS COURT	DIRECTOR 0.	0.	0.	0.

BOLINGBROOK, IL 60440

THE HAGEN FAMILY FOUNDATION	ON			38	3-3482	329		
CHRISTOPHER BORN 2238 CLOVERFIELD SANTA MONICA, CA 90405	DIRI 0.	ECTOR		0. 0.		0.		
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII 0. 0. 0.								
FORM 990-PF	PART XV - T OF FOUNDA	LINE 1A FION MANAGERS	3	STATI	EMENT	9		
NAME OF MANAGER								
DAVID F. HAGEN VIRGINIA L. HAGEN								
FORM 990-PF GI	RANTS AND CO	ONTRIBUTIONS G THE YEAR		STATI	EMENT	10		
RECIPIENT NAME AND ADDRESS	RECIPIENT STATUS	PURPOSE OF G	GRANT	RECIPIENT RELATIONSHP	AMOU	NT		
JOYFUL SPIRIT CHURCH, BOLINGBROOK, IL	PUBLIC	RELIGIOUS		NONE	4,5	00.		
GENERATIONAL LEADERSHIP, MAPLE VALLEY, WA	PUBLIC	GENERAL WELFARE/EDUC	· ·	NONE	12,5	00.		
SAFE HORIZONS, PORT HURON, MI	PUBLIC	GENERAL WELF	'ARE	NONE	3,0	00.		

THE HAGEN FAMILY FOUNDATI		38-3482329		
BOOKS FOR AFRICA, ST. PAUL, MN	PUBLIC	EDUCATIONAL	NONE	8,000.
CHILD CREATIVE WHSHP PRESCHOOL, MALIBU, CA	PUBLIC	EDUCATIONAL	NONE	4,000.
BROWARD COALITION FOR THE HOMELESS, FT. LAUDERDALE, FL	PUBLIC	GENERAL WELFARE	NONE	10,000.
LUTHERAN SCHOOL THEOLOGY, CHIGAGO, IL	PUBLIC	EDUCATIONAL	NONE	5,000.
GOODWILL INDUSTRIES OF GREATER DETROIT, DETROIT,	PUBLIC	GENERAL WELFARE	NONE	2,000.
TOTAL TO FORM 990-PF, PART	XV, LINE 3A			70,000.

#### Form **2220**

Department of the Treasury Internal Revenue Service

## **Underpayment of Estimated Tax by Corporations**

See separate instructions.Attach to the corporation's tax return.

FORM 990-PF

OMB No. 1545-0142

Name

THE HAGEN FAMILY FOUNDATION

Employer identification number

38-3482329

Note: In most cases, the corporation does not need to file Form 2220. (See Part I below for exceptions.) The IRS will figure any penalty owed and bill the corporation. If the corporation does not need to file Form 2220, it may still use it to figure the penalty. Enter the amount from line 34 on the estimated tax penalty line of the corporation's income tax return, but do not attach Form 2220.

Part I Reasons For Filing - Check the boxes below that apply to the corporation. If any boxes are checked, the corporation must file Form 2220, even if it does not owe the penalty. If the box on line 1 or line 2 applies, the corporation may be able to lower or eliminate the penalty.

- 1 (2) The corporation is using the annualized income installment method.
- 2 O The corporation is using the adjusted seasonal installment method.
- 3 (7) The corporation is a "large corporation" figuring its first required installment based on the prior year's tax.

Pa	rt II Figuring the Underpayment								
4	Total tax (see instructions)							4	
5a	Personal holding company tax (Schedule PH (Form 1120	), line 2	26) included on line 4		5a				
b	Look-back interest included on line 4 under section 460(b)(2) for completed long-term								
	contracts or of section 167(g) for property depreciated ur	nder th	e income forecast method	d L	5b				
C	Credit for Federal tax paid on fuels (see instructions)				5c				
d	<b>Total</b> . Add lines 5a through 5c							5d	
6	Subtract line 5d from line 4. If the result is less than \$500	, do no	ot complete or file this for	m. The corp	oratio	n does			
	not owe the penalty							6	
7	Enter the tax shown on the corporation's 2001 income tax								
	year was for less than 12 months, skip this line and ent	er the	amount from line 6 on li	ne 8				7	
8	Enter the <b>smaller</b> of line 6 or line 7. If the corporation is re	equired <b>I</b>				·····		8	
			(a)	(	b)		(c)		(d)
9	Installment due dates. Enter in columns (a) through (d)								
	the 15th day of the 4th (Form 990-PF filers: Use 5th								
	month), 6th, 9th, and 12th months of the corporation's								
10	tax year	9							
10	<b>Required installments.</b> If the box on line 1 and/or line 2 above is checked, enter the amounts from Schedule A,								
	line 40. If the box on line 3 (but not 1 or 2) is checked,								
	see instructions for the amounts to enter. If none of								
	these boxes are checked, enter 25% of line 8 above in each column	10							
11	Estimated tax paid or credited for each period (see	10							
•	instructions). For column (a) only, enter the amount								
	from line 11 on line 15	11							
	Complete lines 12 through 18 of one column before								
	going to the next column.								
12	Enter amount, if any, from line 18 of the preceding								
	column	12							
13	Add lines 11 and 12	13							
14	Add amounts on lines 16 and 17 of the preceding								
	column	14							
15	Subtract line 14 from line 13. If zero or less, enter -0-	15							
16	If the amount on line 15 is zero, subtract line 13 from								
	line 14. Otherwise, enter -0-	16							
17	Underpayment. If line 15 is less than or equal to line			<u> </u>					
	10, subtract line 15 from line 10. Then go to line 12 of								
	the next column. Otherwise, go to line 18	17							
18	Overpayment. If line 10 is less than line 15, subtract line								
	10 from line 15. Then go to line 12 of the next column	18							

Complete Part III on page 2 to figure the penalty. If there are no entries on line 17, no penalty is owed.

JWA For Paperwork Reduction Act Notice, see separate instructions.

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#### Part III Figuring the Penalty

			(a)	(b)	(c)		(d)	)
19	Enter the date of payment or the 15th day of the 3rd							
	month after the close of the tax year, whichever is earlier							
	(see instructions). (Form 990-PF and Form 990-T filers:							
	Use 5th month instead of 3rd month.)	19						
20	Number of days from due date of installment on line 9							
	to the date shown on line 19	20						
21	Number of days on line 20 after 4/15/2002 and before 1/1/2003	21						
22	Underpayment on line 17 x Number of days on line 21 x 6%	22	\$	\$	\$		\$	
23	Number of days on line 20 after 12/31/2002 and before 4/1/2003	23						
24	Underpayment on line 17 x Number of days on line 23 x 5%	24	\$	\$	\$		\$	
25	Number of days on line 20 after 3/31/2003 and before 7/1/2003	25						
26	Underpayment on line 17 x Number of days on line 25 x *%	26	\$	\$	\$		\$	
27	Number of days on line 20 after 6/30/2003 and before 10/1/2003	27						
28	Underpayment on line 17 x Number of days on line 27 x *% 365	28	\$	\$	\$		\$	
29	Number of days on line 20 after 9/30/2003 and before 1/1/2004	29						
30	Underpayment on line 17 x Number of days on line 29 x *%	30	\$	\$	\$		\$	
31	Number of days on line 20 after 12/31/2003 and before 2/16/2004	31						
32	Underpayment on line 17 x Number of days on line 31 x *%	32	\$	\$	\$		\$	
33	Add lines 22, 24, 26, 28, 30, and 32	33	\$	\$	\$		\$	
34	Penalty. Add columns (a) through (d), of line 33. Enter the	total l	nere and on Form 112	20; line 33, Form 1120-A	line			
	29; or the comparable line for other income tax returns					34	<b> </b> \$	0.

<sup>\*</sup> For underpayments paid after March 31, 2003: For lines 26, 28, 30 and 32, use the penalty interest rate for each calendar quarter, which the IRS will determine during the first month in the preceding quarter. These rates are published quarterly in an IRS News Release and in a revenue ruling in the Internal Revenue Bulletin. To obtain this information on the Internet, access the IRS Web Site at www.irs.gov. You can also call 1-800-829-1040 to get interest rate information.

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