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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning 01-01-2009 , and ending 12-31-2009

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.

Name of foundation
The John E Kuenzl Foundation Inc
co Clifton Gunderson LLP

Number and street (or P O box number if mail is not delivered to street address) PO Box 2886 | Room/suite

City or town, state, and ZIP code
Oshkosh, WI 549032886

A Employer identification number 39-1998578

B Telephone number (see page 10 of the instructions) (920) 231-5890

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 21,912,918

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

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	241,321			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	10,962	10,962		
	4	Dividends and interest from securities	906,177	903,602		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	-271,776			
	b	Gross sales price for all assets on line 6a 3,785,180				
	7	Capital gain net income (from Part IV, line 2)		0		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	61,388	0		
	12	**Total.** Add lines 1 through 11	948,072	914,564		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0	0		0
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see page 14 of the instructions)	5,645	5,645		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	129,679	0		0
	24	**Total operating and administrative expenses.** Add lines 13 through 23	135,324	5,645		0
	25	Contributions, gifts, grants paid	1,123,294			1,123,294
	26	**Total expenses and disbursements.** Add lines 24 and 25	1,258,618	5,645		1,123,294
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-310,546			
	b	**Net investment income** (if negative, enter -0-)		908,919		
	c	**Adjusted net income** (if negative, enter -0-)				

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

		Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
1	Cash—non-interest-bearing	35,955	51,206	51,206
2	Savings and temporary cash investments	542,738	583,026	583,026
3	Accounts receivable ▶ Less allowance for doubtful accounts ▶			
4	Pledges receivable ▶ Less allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
7	Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10a	Investments—U S and state government obligations (attach schedule)			
b	Investments—corporate stock (attach schedule)	14,528,479	14,629,593	13,912,331
c	Investments—corporate bonds (attach schedule)	1,572,629	549,591	567,322
11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
12	Investments—mortgage loans			
13	Investments—other (attach schedule)	9,214,363	9,780,213	6,799,033
14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
15	Other assets (describe ▶)	10,011	0	0
16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	25,904,175	25,593,629	21,912,918
17	Accounts payable and accrued expenses			
18	Grants payable			
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable (attach schedule)			
22	Other liabilities (describe ▶)			
23	**Total liabilities** (add lines 17 through 22)	0	0	
	Foundations that follow SFAS 117, check here ▶ ☐ **and complete lines 24 through 26 and lines 30 and 31.**			
24	Unrestricted			
25	Temporarily restricted			
26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☑ **and complete lines 27 through 31.**			
27	Capital stock, trust principal, or current funds	0	0	
28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
29	Retained earnings, accumulated income, endowment, or other funds	25,904,175	25,593,629	
30	**Total net assets or fund balances** (see page 17 of the instructions)	25,904,175	25,593,629	
31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	25,904,175	25,593,629	

Assets: lines 1–16; Liabilities: lines 17–23; Net Assets or Fund Balances: lines 24–31

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	25,904,175
2	Enter amount from Part I, line 27a	2	-310,546
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	25,593,629
5	Decreases 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, column (b), line 30	6	25,593,629

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table			
b				
c				
d				
e				

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
a	See Additional Data Table			
b				
c				
d				
e				

2	Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	-271,776
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2008	801,930	24,463,682	0 032780
2007	320,477	15,350,448	0 020877
2006	201,737	6,508,836	0 030994
2005	59,347	3,551,797	0 016709
2004	9,289	1,100,133	0 008444

2	**Total** of line 1, column (d).	2	0 109804
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years . . .	3	0 021961
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.	4	23,132,280
5	Multiply line 4 by line 3.	5	508,008
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	9,089
7	Add lines 5 and 6.	7	517,097
8	Enter qualifying distributions from Part XII, line 4.	8	1,123,294

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ______ **(attach copy of letter if necessary–see instructions)**		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b	1	9,089
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	0
3	Add lines 1 and 2	3	9,089
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	9,089
6	Credits/Payments		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 6a		
b	Exempt foreign organizations—tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments Add lines 6a through 6d	7	0
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	165
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	9,254
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be **Credited to 2010 estimated tax** ▶ **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ 0 **(2)** On foundation managers ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ WI			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶Gerald Stadtmueller Telephone no ▶(920) 231-5890

Located at ▶100 City Center Oshkosh WI ZIP+4 ▶54903

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? ☑ Yes ☐ No			
	If "Yes," list the years ▶ 2008 , 20____ , 20____ , 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see page 20 of the instructions)	2b	Yes	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____ , 20____ , 20____ , 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☑ Yes ☐ No			
b	If "Yes," did it have excess business holdings in 2009 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009.)*	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		No

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions) ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?	**5b**		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		**No**
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**		

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
James J Williamson PO Box 2886 OSHKOSH, WI 54903	DIRECTOR 0 50	0	0	0
Gerald Stadtmueller PO Box 2886 OSHKOSH, WI 54903	DIRECTOr 0 50	0	0	0
Norma Kuenzl PO Box 2886 OSHKOSH, WI 54903	DireCTOR 0 50	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."

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

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

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

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

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
NONE		
Total number of others receiving over $50,000 for professional services . . . . ▶		0

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

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

Part IX-B **Summary of Program-Related Investments** (see page 23 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	
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3. . . . . ▶	0

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	22,372,784
b	Average of monthly cash balances	1b	1,111,764
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	23,484,548
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	23,484,548
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	352,268
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	23,132,280
6	**Minimum investment return.** Enter 5% of line 5	6	1,156,614

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

1	Minimum investment return from Part X, line 6	1	1,156,614
2a	Tax on investment income for 2009 from Part VI, line 5 — 2a: 9,089		
b	Income tax for 2009 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	9,089
3	Distributable amount before adjustments Subtract line 2c from line 1	3	1,147,525
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	1,147,525
6	Deduction from distributable amount (see page 25 of the instructions)	6	0
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	1,147,525

Part XII Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	1,123,294
b	Program-related investments—total from Part IX-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,123,294
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	9,089
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	1,114,205

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

Part XIII Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				1,147,525
2 Undistributed income, if any, as of the end of 2008				
a Enter amount for 2008 only.			1,125,550	
b Total for prior years 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2009				
a From 2004.				
b From 2005.				
c From 2006.				
d From 2007.				
e From 2008.				
f **Total** of lines 3a through e.	0			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ $ 1,123,294				
a Applied to 2008, but not more than line 2a			1,123,294	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .	0			
d Applied to 2009 distributable amount.				0
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2009 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	0			0
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . .		0		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			2,256	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				1,147,525
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)	0			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	0			
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2005. . . .				
b Excess from 2006. . . .				
c Excess from 2007. . . .				
d Excess from 2008. . . .				
e Excess from 2009. . . .				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling. . . . . . . ▶

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			
	(a) 2009	**(b)** 2008	**(c)** 2007	**(d)** 2006	**(e) Total**
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter **(1)** Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .					
c "Support" alternative test—enter **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . .					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the organization had $5,000 or more in assets at any time during the year—see page 27 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))

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

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

Check here ▶☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number of the person to whom applications should be addressed

Gerald J Stadtmueller
P O Box 2886
Oshkosh, WI 54903
(920) 231-5890

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

Applications should be submitted in writing along with the name and address of the applicant and a description of how the funds will be used

c Any submission deadlines

December 1

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

None

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				1,123,294
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			01	10,962	
4 Dividends and interest from securities. . . .			14	906,177	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	-271,776	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. .					
11 Other revenue a Income per Gambrinus Enterprises, Inc K-1					61,076
b Other Income					312
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .		0		645,363	61,388

13 **Total.** Add line 12, columns (b), (d), and (e). 13 706,751

(See worksheet in line 13 instructions on page 28 to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)
11A	Ordinary Business Income(loss) received from Gambrinus Enterprises K-1

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

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

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

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

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

b If "Yes," complete the following schedule

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

Sign Here

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

******	2010-11-08	******
Signature of officer or trustee	Date	Title

Paid Preparer's Use Only

		Date	Check if self-employed ☐	Preparer's identifying number (see **Signature** on page 30 of the instructions)
Preparer's Signature	Gerald J Stadtmueller			
Firm's name (or yours if self-employed), address, and ZIP code	Clifton Gunderson LLP PO Box 2886 Oshkosh, WI 549032886		EIN Phone no (920) 231-5890	

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

Schedule of Contributors

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

OMB No 1545-0047

2009

Name of organization
The John E Kuenzl Foundation Inc
co Clifton Gunderson LLP

Employer identification number
39-1998578

Organization type (check one)

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☑ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule—

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

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ, that met the $33^{1}/3$% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or 990-EZ, that received from any one contributor, during the year, aggregate contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990, or 990-EZ, that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc , purposes, but these contributions did not aggregate to more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc , contributions of $5,000 or more during the year . . . . ▶ $ ____________

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

Name of organization
The John E Kuenzl Foundation Inc
co Clifton Gunderson LLP

Employer identification number
39-1998578

Part I **Contributors** (see Instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Estate of John E Kuenzl co James J PO Box 886 OSHKOSH, WI 54903	$ 241,321	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Name of organization
The John E Kuenzl Foundation Inc
co Clifton Gunderson LLP

Employer identification number
39-1998578

Part II **Noncash Property** (see Instructions)

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

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

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

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

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

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

Name of organization	Employer identification number
The John E Kuenzl Foundation Inc co Clifton Gunderson LLP	39-1998578

Part III ***Exclusively*** **religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than $1,000 for the year.** (Complete columns **(a)** through **(e) and** the following line entry)
For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **$1,000 or less** for the year (Enter this information once See instructions) ▶ $

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee

Additional Data

Software ID: 09000028
Software Version: 2009.04050
EIN: 39-1998578
Name: The John E Kuenzl Foundation Inc
co Clifton Gunderson LLP

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
JP Morgan - Short Term See Attached	P		
JP Morgan - Long Term see Attached	P		
Pass-through Per K-1 from Gambrinus Enterprises	P		
Entergy - 10,000 sh - JP Morgan	P		2009-03-11
Anheiser Busch - 7,200 sh - JP Morgan	P		2009-03-11
Capital Gains Dividends	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
1,078,424		1,465,839	-387,415
989,934		1,441,285	-451,351
576,719			576,719
635,741		760,600	-124,859
504,000		389,232	114,768
362			362

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			-387,415
			-451,351
			576,719
			-124,859
			114,768
			362

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
AMERICAN CANCER SOCIETY3311 S Packerland Dr De Pere, WI 54115	NONE	PUBLIC CHARITY	GENERAL PURPOSE	5,000
AMERICAN DIABETES FOUNDATION1701 North Beauregard Street Alexandria, VA 22311	NONE	PUBLIC CHARITY	GENERAL PURPOSE	15,000
American Heart Association7272 Greenville Avenue Dallas, TX 75231	NONE	PUBLIC CHARITY	GENERAL PURPOSE	15,000
American Red Cross of Eastern WI 515 S Washburn St 206 Oshkosh, WI 54904	NONE	PUBLIC CHARITY	GENERAL PURPOSE	10,000
American Red Cross of Fond du Lac 272 N Main St Fond du Lac, WI 54935	NONE	PUBLIC CHARITY	GENERAL PURPOSE	10,000
Biron Fire Department451 Kahoun Road Wisconsin Rapids, WI 54494	nONE	pUBLIC CHARITY	gENERAL PURPOSE	2,800
Bloomer Fire Department1503 Main Street Bloomer, WI 54724	nONE	pUBLIC CHARITY	gENERAL PURPOSE	2,500
Christine Ann Domestic Abuse Services206 Algoma Blvd oshkosh, WI 54901	nONE	pUBLIC CHARITY	gENERAL PURPOSE	40,000
Clarity Care Help at Home424 Washington Ave Oshkosh, WI 54901	nONE	pUBLIC CHARITY	gENERAL PURPOSE	10,000
Experimenal Aircraft Association 3000 Poberezny Rd Oshkosh, WI 54902	NONE	PUBLIC CHARITY	GENERAL PURPOSE	5,000
Grand Opera House Foundation222 Pearl Avenue Oshkosh, WI 54901	nonE	pUBLIC CHARITY	gENERAL PURPOSE	50,000
Habitat for Humanity1306 Michigan St Oshkosh, WI 54902	NONE	PUBLIC CHARITY	GENERAL PURPOSE	57,500
Jasper Pickett FoundationPO Box 336 Pickett, WI 54964	nONE	pUBLIC CHARITY	gENERAL PURPOSE	1,000
Living Healthy Community Clinic510 Doctors Court oshkosh, WI 54901	nONE	pUBLIC CHARITY	gENERAL PURPOSE	10,000
Military Veterans Museum375 City Center Suite K Oshkosh, WI 54901	NONE	PUBLIC CHARITY	GENERAL PURPOSE	100,000
Total . . . . ▶ **3a**				1,123,294

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Neenah Hockey Booster Club1375 Martingale Lane Neenah, WI 54956	nonE	PUBLIC CHARITY	gENERAL PURPOSE	7,000
NEKIMI VOLUNTEER FIRE DEPARTMENT15 North Oakwood Road Oshkosh, WI 54904	NONE	PUBLIC CHARITY	GENERAL PURPOSE	10,800
Oshkosh Area Community Foundation 230 Ohio St 100 Oshkosh, WI 54902	NONE	PUBLIC CHARITY	GENERAL PURPOSE	350,000
Oshkosh Area Community Pantry 2551 Jackson St Oshkosh, WI 54901	NONE	PUBLIC CHARITY	GENERAL PURPOSE	125,000
OSHKOSH AREA COMMUNITY YMCA3303 W 20th Ave Oshkosh, WI 54904	NONE	PUBLIC CHARITY	GENERAL PURPOSE	50,000
Oshkosh Area Humane Society1925 Shelter Ct Oshkosh, WI 54901	nONE	pUBLIC CHARITY	gENERAL PURPOSE	10,000
Oshkosh Area United Way36 Broad Street 100 Oshkosh, WI 54901	nONE	pUBLIC CHARITY	gENERAL PURPOSE	100,000
Oshkosh Christian School3450 Vinland Rd Oshkosh, WI 54901	NONE	PUBLIC CHARITY	GENERAL PURPOSE	5,000
Oshkosh Public Museum1331 Algoma Blvd oshkosh, WI 54901	nONE	pUBLIC CHARITY	gENERAL PURPOSE	5,000
Oxford Fire DepartmentW8593 State Road 82 Oxford, WI 53952	nONE	pUBLIC CHARITY	gENERAL PURPOSE	5,000
Salvation Army417 Algoma Blvd Oshkosh, WI 54901	NONE	PUBLIC CHARITY	GENERAL PURPOSE	50,000
Scandinavia Fire Department349 N Main St Scandinavia, WI 54977	NONE	PUBLIC CHARITY	GENERAL PURPOSE	5,000
ST JUDES262 Danny Thomas Place Memphis, TN 38105	NONE	PUBLIC CHARITY	GENERAL PURPOSE	5,000
Stockbridge Fire Department175 S Military Rd Stockbridge, WI 53088	NONE	PUBLIC CHARITY	GENERAL PURPOSE	3,800
TOWN OF ELDORADO FIRE DEPARTMENT180 S Macy St Fond Du Lac, WI 54935	NONE	PUBLIC CHARITY	GENERAL PURPOSE	4,294
Total . . . . ▶ **3a**				1,123,294

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
TOWN OF NESHKORO FIRE DEPARTMENT610 S Main St Neshkoro, WI 54960	NONE	PUBLIC CHARITY	GENERAL PURPOSE	5,500
Town of Oshkosh Fire Department 1065 Cozy Lane Oshkosh, WI 54901	nONE	pUBLIC CHARITY	gENERAL PURPOSE	12,000
VAN DYNE FIRE DEPARTMENT N9515 Van Dyne Rd Van Dyne, WI 54979	NONE	PUBLIC CHARITY	GENERAL PURPOSE	4,000
Wautoma Fire Department568 S Fair Wautoma, WI 54982	NONE	PUBLIC CHARITY	GENERAL PURPOSE	2,100
Winnebago County Historical Society 234 Church Avenue oshkosh, WI 54901	nONE	pUBLIC CHARITY	gENERAL PURPOSE	5,000
Wisconsin Veterans HomeN2665 County Road QQ King, WI 54946	NONE	PUBLIC CHARITY	GENERAL PURPOSE	25,000
Total . . . . ▶ **3a**				1,123,294

TY 2009 Investments Corporate Bonds Schedule

Name: The John E Kuenzl Foundation Inc
co Clifton Gunderson LLP

EIN: 39-1998578

Name of Bond	End of Year Book Value	End of Year Fair Market Value
DODGE & COX INCOME FUND	549,590	567,321
JP Morgan Prime MM Fund	1	1

TY 2009 Investments Corporate Stock Schedule

Name: The John E Kuenzl Foundatıon Inc
co Clıfton Gunderson LLP

EIN: 39-1998578

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Anheuser-Busch	0	0
Apollo Invt Corp	0	0
Artıo Intl Equıty Fund	394,432	385,767
Barclays Bk Annual Revıew	0	0
Barclays PLC Return Enhanced	0	0
CMS Energy	85,000	156,600
CS EAFE Bren	100,000	103,780
CVS Corp	49,902	37,211
Deutsche Bk AG Buffered	0	0
Deutsche Bk Arn SPX	90,000	87,309
Eagle Ser Mıd Cap Stk Fd Cl A	126,920	117,909
Eaton Vanc Mut Fds	505,608	525,780
Eaton Vance Mut Fds Tr	250,000	260,049
Entergy Corporatıon	3,482,998	3,748,272
Fıdelıty Adv HI Income	0	0
Fıdelıty Natıonal Info	25,987	32,066
Fırst Energy	156,480	185,800
Footstar, Inc	1,647	242
Foster Wheeler	11,100	29,840
GS 9M EAFE Note	80,000	83,896
GS 9M SPX Note	160,000	164,040
HARBOR FUNDS INTERNATIONAL FUND	0	0
HIGHBRIDGE STAT	184,770	178,799
Intl Rectıfıer	881,200	442,400
ISHARES BARCLAYS TIPS	497,768	511,188
IShares MSCI Asıan EX Japan	70,088	87,409
ISHARES TR Russell 1000 Growth	316,212	272,929
IShares TR Russell MIDCAP INDEX	294,381	305,287
JP Morgan Hıgh Yıeld Bond Fund	327,279	330,515
JP Morgan Internatıonal Currency	162,670	160,874

Name of Stock	End of Year Book Value	End of Year Fair Market Value
JP Morgan Short Duration Bond	495,000	501,098
JP Morgan Strategic Income	186,000	216,223
JPMORGAN ASIA EQUITY FUND	333,520	339,010
JPMORGAN INTREPID	270,976	166,437
JPMORGAN INTREPID AMERICAN FUND	227,009	153,402
JPMORGAN LIQUID ASSETS MONEY MARKET	348,715	348,715
JPMORGAN US REAL ESTATE FUND	222,014	130,157
KEELEY SMALL CAP VALUE FUND INC.	0	0
M&I Corp	124,393	16,579
MANAGERS AMG FDS	267,225	230,249
Manning & Napier New World	150,000	193,641
Morgan Stanley	0	0
Newpark Resources	4,767	3,553
Nuveen Tradewinds Val Opport	143,750	217,268
Old Mut Analytic US Lg Shrt Fd	113,694	101,790
Pfizer	721,500	363,800
Spdr TR Unit Ser 1	0	0
T Rowe Price Intl Fds New Asia	219,000	277,882
The Timken Company	94,760	94,840
Third Ave Fd	291,491	235,511
Thornburg Invt Tr Value	388,655	346,226
Unisys Corp	137,950	38,560
US Equity Fund	194,327	169,872
US Large Cap Core Plus	276,291	266,330
VAnguard Fixed Income Sec F	628,669	721,197
Vanguard FX Inc Sec Int TM Invt	485,000	508,369
Vanguard Intl Eq Idx Emerg Mft	0	0
Xcel Energy	50,445	63,660

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TY 2009 Investments - Other Schedule

Name: The John E Kuenzl Foundation Inc
co Clifton Gunderson LLP

EIN: 39-1998578

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Gambrinus	AT COST	9,780,213	6,799,033

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TY 2009 Other Assets Schedule

Name: The John E Kuenzl Foundation Inc
co Clifton Gunderson LLP

EIN: 39-1998578

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Dividends Receivable	10,011		

TY 2009 Other Expenses Schedule

Name: The John E Kuenzl Foundation Inc
co Clifton Gunderson LLP

EIN: 39-1998578

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE OF WISCONSIN ANNUAL REPORT FEE	10	0		0
AGENCY FEES	47,659	0		0
Miscellaneous	10,065	0		0
Gambrinus Enterprises, Inc K-1	71,945	0		0

TY 2009 Other Income Schedule

Name: The John E Kuenzl Foundation Inc
co Clifton Gunderson LLP

EIN: 39-1998578

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Income per Gambrinus Enterprises, Inc K-1	61,076		61,076
Other Income	312		312

TY 2009 Taxes Schedule

Name: The John E Kuenzl Foundation Inc
co Clifton Gunderson LLP

EIN: 39-1998578

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL INCOME TAX	4,092	4,092		0
FOREIGN TAX PAID	1,553	1,553		0