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Form 990-PF

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

OMB No 1545-0052

2010

Department of the Treasury Internal Revenue Service

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

For calendar year 2010, or tax year beginning 01-01-2010, and ending 12-31-2010

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

Name of foundation: KUTSCHE CHARITABLE TRUST

A Employer identification number

38-6610379

Number and street (or P O box number if mail is not delivered to street address) Room/suite: PO BOX 3636

B Telephone number (see page 10 of the instructions)

(800) 400-0439

City or town, state, and ZIP code: GRAND RAPIDS, MI 495013636

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

H Check type of organization: Section 501(c)(3) exempt private foundation

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 2,352,934

J Accounting method: Cash, Accrual, Other (specify)

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

Part I Analysis of Revenue and Expenses

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), with a total of 137,601 for revenue and 140,576 for expenses.

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

Part II Balance Sheets		Beginning of year		End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1 Cash—non-interest-bearing	10,966	1,625	1,625	
	2 Savings and temporary cash investments	12,125	78,721	78,721	
	3 Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____		0	0	
	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 ▶ _____ 0				
	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)				
	c Investments—corporate bonds (attach schedule)				
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____				
	12 Investments—mortgage loans				
	13 Investments—other (attach schedule)	2,125,994	2,061,961	2,272,588	
	14 Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____				
15 Other assets (describe ▶ _____)	3,325	7,022			
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	2,152,410	2,149,329	2,352,934		
Liabilities	17 Accounts payable and accrued expenses				
	18 Grants payable				
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable (attach schedule)				
	22 Other liabilities (describe ▶ _____)				
23 Total liabilities (add lines 17 through 22)		0			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>				
	and complete lines 24 through 26 and lines 30 and 31.				
	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>				
	and complete lines 27 through 31.				
27 Capital stock, trust principal, or current funds	2,143,572	2,139,241			
28 Paid-in or capital surplus, or land, bldg, and equipment fund					
29 Retained earnings, accumulated income, endowment, or other funds	8,838	10,088			
30 Total net assets or fund balances (see page 17 of the instructions)	2,152,410	2,149,329			
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	2,152,410	2,149,329			

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	2,152,410
2	Enter amount from Part I, line 27a	2	-2,975
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	2,149,435
5	Decreases not included in line 2 (itemize) ▶ _____	5	106
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,149,329

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			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
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	68,319
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))
2009	93,576	1,981,324	0.047229
2008	98,094	2,336,541	0.041983
2007	141,537	2,765,136	0.051186
2006	135,899	2,643,843	0.051402
2005	129,304	2,522,179	0.051267

2 Total of line 1, column (d).	2	0.243067
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	0.048613
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5.	4	2,242,951
5 Multiply line 4 by line 3.	5	109,037
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	1,114
7 Add lines 5 and 6.	7	110,151
8 Enter qualifying distributions from Part XII, line 4.	8	113,816

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 <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	1,114
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	1,114
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	1,114
6	Credits/Payments		
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a	1,308
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments Add lines 6a through 6d.	7	1,308
8	Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	194
11	Enter the amount of line 10 to be Credited to 2011 estimated tax 194 Refunded	11	0

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?		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)? <i>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.</i>		No
c Did the foundation file Form 1120-POL for this year?		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ _____ (2) On foundation managers \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		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? <i>If "Yes," attach a conformed copy of the changes</i>		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		No
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		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?	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) MI		
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? <i>If "No," attach explanation .</i>	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 2010 or the taxable year beginning in 2010 (see instructions for Part XIV on page 27)? <i>If "Yes," complete Part XIV</i>		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		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? Website address ▶ _____	13	Yes			
14	The books are in care of ▶ <u>FIFTH THIRD BANK</u> Telephone no ▶ <u>(616) 653-5417</u> Located at ▶ <u>111 LYON STREET NW GRAND RAPIDS MI</u> ZIP+4 ▶ <u>49503</u>					
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶ <table border="1"><tr><td>15</td><td></td></tr></table>	15				
15						
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		No		

See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country ▶ _____

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly)		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
1b	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)? . . . Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/>	1b	
1c	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 2010?	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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____		
2b	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	No
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
3b	If "Yes," did it have excess business holdings in 2010 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010.</i>)	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	No
4b	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 2010?	4b	No

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

<p>5a During the year did the foundation pay or incur any amount to</p> <p>(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(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). . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>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)? Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/></p> <p>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? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," attach the statement required by Regulations section 53.4945–5(d).</p> <p>6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes" to 6b, file Form 8870.</p> <p>7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	5b	
6b	No	
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
Fifth Third Bank 111 Lyon Street NW Grand Rapids, MI 49501	Trustee 1	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 24 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	
3 All other program-related investments. See page 24 of the instructions	

Total. Add lines 1 through 3.

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	2,277,108
b	Average of monthly cash balances.	1b	0
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	2,277,108
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	2,277,108
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	34,157
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,242,951
6	Minimum investment return. Enter 5% of line 5.	6	112,148

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	112,148
2a	Tax on investment income for 2010 from Part VI, line 5.	2a	1,114
b	Income tax for 2010 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,114
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	111,034
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	111,034
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	111,034

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	113,816
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	113,816
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	1,114
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	112,702

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 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				111,034
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only.			0	
b Total for prior years 2008, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2010				
a From 2005.				0
b From 2006.				0
c From 2007.				1,635
d From 2008.				0
e From 2009.				0
f Total of lines 3a through e.	1,635			
4 Qualifying distributions for 2010 from Part XII, line 4 ▶ \$ <u>113,816</u>				
a Applied to 2009, but not more than line 2a			0	
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 2010 distributable amount.				111,034
e Remaining amount distributed out of corpus	2,782			
5 Excess distributions carryover applied to 2010 (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	4,417			
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 2009 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions.			0	
f Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011.				0
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 2005 not applied on line 5 or line 7 (see page 27 of the instructions).	0			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a.	4,417			
10 Analysis of line 9				
a Excess from 2006.				0
b Excess from 2007.				1,635
c Excess from 2008.				0
d Excess from 2009.				0
e Excess from 2010.				2,782

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 2010, 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			(e) Total
	(a) 2010	(b) 2009	(c) 2008	(d) 2007	
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))

NONE

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

NONE

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

Check here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see 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

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

c Any submission deadlines

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

Part XV **Supplementary Information** (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> MARY FREE BED HOS & REHAB CTR ATTN RANDALL L DENEFF 235 WEALTHY ST SE GRAND RAPIDS, MI 49503	NONE	509 A (1)	RESEARCH & DIAGNOSTIC EQUIPMENT	37,847
ST MARY'S HEALTH SERVICES MICHELLE RABIDEAU DIRECT 200 JEFFERSON SE GRAND RAPIDS, MI 49503	NONE	509 A (1)	RESEARCH & DIAGNOSTIC EQUIPMENT	37,847
SPECTRUM HEALTH FOUNDATION ATTN LARRY B JONGEKRIK 100 MICHIGAN ST NE GRAND RAPIDS, MI 49503	NONE	509 A (1)	RESEARCH AND DIAGNOSTIC EQUIPMENT	37,847
Total			▶ 3a	113,541
b <i>Approved for future payment</i>				
Total			▶ 3b	

Additional Data

Software ID:
Software Version:
EIN: 38-6610379
Name: KUTSCHE CHARITABLE TRUST

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)
A	360 FIDELTIY ADV SMALL CAP FD-I		2009-06-09	2010-01-26
B	824 668 FIRST EAGLE GOLD FUND-A		2010-04-15	2010-11-24
C	12020 FIFTH THIRD DISCIPLINED LARGE VALUE FUND		2010-04-15	2010-12-27
D	171 767 FIFTH THIRD DISCIPLINED LARGE VALUE FUND		2002-10-15	2010-12-27
E	3500 601 FIFTH THIRD DISCIPLINED LARGE VALUE FUND		2003-02-12	2010-12-27
F	2712 826 FIFTH THIRD DISCIPLINED LARGE VALUE FUND		2003-03-10	2010-12-27
G	204 823 FIFTH THIRD DISCIPLINED LARGE VALUE FUND		2008-12-10	2010-12-27
H	1760 FIFTH THIRD DISCIPLINED LARGE VALUE FUND		2009-04-21	2010-12-27
I	1165 GROWTH FD AMER INC CL F2		2007-11-21	2010-04-15
J	74 918 GROWTH FD AMER INC CL F2		2009-12-22	2010-04-16
K	95 375 GROWTH FD AMER INC CL F2		2008-12-23	2010-04-16
L	2448 773 GROWTH FD AMER INC CL F2		2007-11-21	2010-11-24
M	528 298 GROWTH FD AMER INC CL F2		2007-12-19	2010-11-24
N	1430 776 GROWTH FD AMER INC CL F2		2008-02-06	2010-11-24
O	1252 GROWTH FD AMER INC CL F2		2009-04-21	2010-11-24
P	001 GROWTH FD AMER INC CL F2		2008-11-21	2010-11-24
Q	156 ISHARES TR DOW JONES SELECT DIVID INDEX		2007-11-20	2010-04-15
R	192 ISHARES TR DOW JONES SELECT DIVID INDEX		2008-01-24	2010-04-15
S	422 ISHARES TR DOW JONES SELECT DIVID INDEX		2004-08-04	2010-04-15
T	1000 ISHARES TR DOW JONES SELECT DIVID INDEX		2004-08-11	2010-04-15
U	750 ISHARES BARCLAYS TIPS BOND FUND		2008-06-25	2010-11-24
V	140 ISHARES BARCLAYS TIPS BOND FUND		2010-04-15	2010-11-24
W	150 ISHARES BARCLAYS TIPS BOND FUND		2009-04-21	2010-11-24
X	131 ISHARES BARCLAYS TIPS BOND FUND		2009-06-09	2010-11-24
Y	539 ISHARES TR MSCI EMERGING MKTS INDEX FD		2010-11-24	2010-12-27
Z	225 ISHARES TR MSCI EMERGING MKTS INDEX FD		2010-04-15	2010-12-27
AA	665 ISHARES TR MSCI EMERGING MKTS INDEX FD		2005-10-04	2010-12-27
AB	275 ISHARES S&P MIDCAP 400 GROWTH		2008-06-25	2010-04-15
AC	236 ISHARES S&P MIDCAP 400 GROWTH		2008-06-25	2010-11-24
AD	59 ISHARES S&P MIDCAP 400 GROWTH		2008-12-17	2010-11-24

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)
AE	100 ISHARES S&P MIDCAP 400 GROWTH		2008-12-17	2010-12-27
AF	436 ISHARES S&P MIDCAP 400 VALUE		2008-06-25	2010-11-24
AG	149 ISHARES S&P MIDCAP 400 VALUE		2008-06-25	2010-12-27
AH	75 ISHARES S&P MIDCAP 400 VALUE		2010-04-15	2010-12-27
AI	70 ISHARES S&P PFD STK INDX FN		2008-06-25	2010-04-15
AJ	2798 ISHARES S&P PFD STK INDX FN		2008-06-25	2010-11-24
AK	19500 PIMCO TOTAL RETURN FUND		2009-12-22	2010-04-15
AL	4355 PIMCO TOTAL RETURN FUND		2009-12-22	2010-11-24
AM	16002 PIMCO TOTAL RETURN FUND		2008-06-25	2010-11-24
AN	98 465 PIMCO COMMODITY REALRETURN STRAT		2009-12-09	2010-04-15
AO	2354 535 PIMCO COMMODITY REALRETURN STRAT		2009-06-09	2010-04-15
AP	5645 465 PIMCO COMMODITY REALRETURN STRAT		2009-06-09	2010-06-29
AQ	87 799 PIMCO ALL ASSET FUND		2010-03-18	2010-04-16
AR	99 828 PIMCO ALL ASSET FUND		2009-09-17	2010-04-16
AS	443 714 PIMCO ALL ASSET FUND		2009-12-30	2010-04-16
AT	99 964 PIMCO ALL ASSET FUND		2008-06-25	2010-04-16
AU	317 486 PIMCO ALL ASSET FUND		2008-12-30	2010-04-16
AV	86 946 PIMCO ALL ASSET FUND		2009-03-19	2010-04-16
AW	4942 PIMCO ALL ASSET FUND		2008-06-25	2010-11-24
AX	581 T ROWE PRICE EQUITY INCOME FD SH BEN INT		2010-11-24	2010-12-27
AY	1091 ROYCE FD PREMIER		2010-04-15	2010-11-24
AZ	2160 ROYCE FD TOTAL RETURN FD		2008-12-17	2010-11-24
BA	870 SPDR DJ WILSHIRE INTL REAL ESTAT		2010-04-15	2010-08-31

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)
A	8,129		7,038	1,091
B	28,377		23,000	5,377
C	128,734		125,609	3,125
D	1,840		1,716	124
E	37,491		33,326	4,165
F	29,054		25,284	3,770
G	2,194		1,594	600
H	18,850		12,848	6,002
I	34,286		41,246	-6,960
J	2,167		2,032	135
K	2,758		1,888	870
L	71,969		86,698	-14,729
M	15,527		17,661	-2,134
N	42,051		44,574	-2,523
O	36,796		26,154	10,642
P				
Q	7,407		10,048	-2,641
R	9,116		11,773	-2,657
S	20,036		23,206	-3,170
T	47,480		54,900	-7,420
U	81,824		79,394	2,430
V	15,274		14,600	674
W	16,365		14,984	1,381
X	14,292		13,078	1,214
Y	25,074		24,767	307
Z	10,467		9,888	579
AA	30,935		19,027	11,908
AB	24,570		25,077	-507
AC	22,708		21,521	1,187
AD	5,677		3,245	2,432

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)
AE	10,123		5,501	4,622
AF	32,870		33,458	-588
AG	11,881		11,434	447
AH	5,980		5,670	310
AI	2,714		2,864	-150
AJ	109,899		114,494	-4,595
AK	216,060		211,185	4,875
AL	50,039		47,165	2,874
AM	183,863		170,256	13,607
AN	802		793	9
AO	19,189		17,730	1,459
AP	41,212		42,510	-1,298
AQ	1,044		1,030	14
AR	1,187		1,168	19
AS	5,276		5,107	169
AT	1,189		1,241	-52
AU	3,775		3,197	578
AV	1,034		840	194
AW	61,726		62,150	-424
AX	13,752		12,927	825
AY	21,089		20,118	971
AZ	27,238		18,446	8,792
BA	30,479		31,764	-1,285

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

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	
A			1,091
B			5,377
C			3,125
D			124
E			4,165
F			3,770
G			600
H			6,002
I			-6,960
J			135
K			870
L			-14,729
M			-2,134
N			-2,523
O			10,642
P			
Q			-2,641
R			-2,657
S			-3,170
T			-7,420
U			2,430
V			674
W			1,381
X			1,214
Y			307
Z			579
AA			11,908
AB			-507
AC			1,187
AD			2,432

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) FM V as of 12/31/69		(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any
AE			4,622
AF			-588
AG			447
AH			310
AI			-150
AJ			-4,595
AK			4,875
AL			2,874
AM			13,607
AN			9
AO			1,459
AP			-1,298
AQ			14
AR			19
AS			169
AT			-52
AU			578
AV			194
AW			-424
AX			825
AY			971
AZ			8,792
BA			-1,285

TY 2010 Accounting Fees Schedule

Name: KUTSCHE CHARITABLE TRUST

EIN: 38-6610379

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE	550	275		275

TY 2010 Investments - Other Schedule

Name: KUTSCHE CHARITABLE TRUST

EIN: 38-6610379

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ISHARES MSCI EMERGING	AT COST	50,193	85,756
FIFTH THIRD HIGH YIELD BD FD	AT COST	52,282	59,012
ISHARES BARCLAY'S TIPS BD	AT COST	17,125	18,278
ISHARES S&P PREF STK	AT COST	56,035	59,480
PIMCO TOTAL RETURN FUND	AT COST	384,100	392,148
DODGE & COX INTL STOCK FUND	AT COST	120,999	159,807
PIMCO ALL ASSET FUND	AT COST	114,039	112,643
ROYCE FUND TOTAL RETURN FUND	AT COST	34,749	36,086
FIDELITY ADV SMALL	AT COST	28,211	36,231
VANGUARD REIT	AT COST	110,004	164,726
DODGE & COX INCOME FUND	AT COST	389,789	386,978
FIDELITY ADV NEW INSIGHTS	AT COST	103,513	105,030
ISHARES MIDCAP S&P 400 GROWTH	AT COST	16,502	30,216
ISHARES S&P MIDCAP 400 VALUE	AT COST	20,516	30,989
OPPENHEIMER DVLPING MKTS	AT COST	84,000	86,101
T ROWE PRICE EQUITY INCOME	AT COST	99,012	105,421
ROYCE FD PREMIER INVT	AT COST	46,042	52,081
VANGUARD DIVIDEND APPRECIATION	AT COST	201,929	209,730
T ROWE PRICE NEW ERA	AT COST	132,921	141,875

TY 2010 Other Assets Schedule

Name: KUTSCHE CHARITABLE TRUST

EIN: 38-6610379

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ACCRUED INCOME	3,325	7,022	0

TY 2010 Other Decreases Schedule

Name: KUTSCHE CHARITABLE TRUST

EIN: 38-6610379

Description	Amount
ADJUSTMENT FOR PRIOR YEAR RETURN OF CAPITAL	106

TY 2010 Other Expenses Schedule

Name: KUTSCHE CHARITABLE TRUST

EIN: 38-6610379

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK SERVICE FEES	12,671	12,671		0
BANK SERVICE FEES	12,671	12,671		0

TY 2010 Taxes Schedule

Name: KUTSCHE CHARITABLE TRUST

EIN: 38-6610379

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX ESTIMATE	556	0		0
FOREIGN TAXES ON QUALIFIED FOR	574	574		0
FOREIGN TAXES PAID - NQDI	13	13		0