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
2010

For calendar year 2010, or tax year beginning , 2010, and ending , 20

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

Name of foundation
JOHN & CATHERINE SHULER CHARITABLE TRUST (23-37498)

A Employer identification number
42-6076704

Number and street (or P O box number if mail is not delivered to street address) Room/suite
NORTHERN TRUST N.A., AGENT

B Telephone number (see page 10 of the instructions)
(312) 630-6000

City or town, state, and ZIP code
PO BOX 803878 - CHICAGO, IL 60680

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 [X] 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)* ▶ $ 757,343.00

J Accounting method [X] 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)				
	2 Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3 Interest on savings and temporary cash investments	24,835.00	24,835.00		
	4 Dividends and interest from securities				
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	18,959.00			
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		18,959.00		
	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)	3.00			
	12 **Total.** Add lines 1 through 11	43,797.00	43,794.00		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	1,000.00	1,000.00		
	c Other professional fees (attach schedule)	2,866.00	2,866.00		
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	245.00	245.00		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 **Total operating and administrative expenses.** Add lines 13 through 23	4,111.00	4,111.00		
	25 Contributions, gifts, grants paid	32,178.00			32,178.00
	26 **Total expenses and disbursements.** Add lines 24 and 25	36,289.00	4,111.00		32,178.00
	27 Subtract line 26 from line 12				
	a **Excess of revenue over expenses and disbursements**	7,508.00			
	b **Net investment income** (if negative, enter -0-)		39,683.00		
	c **Adjusted net income** (if negative, enter -0-)				

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6

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	17,154.00	20,614.00	20,614.00
	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			
	10 a Investments - U S and state government obligations (attach schedule)	30,873.00	30,807.00	32,724.00
	b Investments - corporate stock (attach schedule)	337,513.00	297,866.00	377,472.00
	c Investments - corporate bonds (attach schedule)	203,958.00	227,543.00	243,528.00
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	12 Investments - mortgage loans			
	13 Investments - other (attach schedule)	26,499.00	15,713.00	22,839.00
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶)	18,143.00	48,088.00	60,166.00
	16 **Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	634,140.00	640,631.00	757,343.00
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)			
Net Assets or Fund Balances	**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. ▶ X			
	27 Capital stock, trust principal, or current funds	634,140.00	640,631.00	
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 **Total net assets or fund balances** (see page 17 of the instructions)	634,140.00	640,631.00	
	31 **Total liabilities and net assets/fund balances** (see page 17 of the instructions)	634,140.00	640,631.00	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	634,140.00
2	Enter amount from Part I, line 27a	2	7,508.00
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	641,648.00
5	Decreases not included in line 2 (itemize) ▶	5	1,017.00
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	640,631.00

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	LONG TERM CAP GAIN DIVIDENDS			
b	SHORT TERM CAPITAL GAINS - SEE ATTACHED			
c	LONG TERM CAPITAL GAINS - SEE ATTACHED			
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	300.00			300.00
b	75,651.00		72,917.00	2,734.00
c	277,259.00		261,334.00	15,925.00
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				300.00
b				2,734.00
c				15,925.00
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	18,959.00
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	37,622.00	657,630.00	0.0572
2008	41,207.00	761,027.00	0.0541
2007	39,821.00	859,574.00	0.0463
2006	38,752.00	810,896.00	0.0478
2005	40,432.00	801,037.00	0.0505

2 **Total** of line 1, column (d)	2	0.2559
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	0.0512
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	706,982.76
5 Multiply line 4 by line 3	5	36,197.52
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	396.83
7 Add lines 5 and 6	7	36,594.35
8 Enter qualifying distributions from Part XII, line 4	8	32,178.00

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 ruling letter if necessary - see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b		1	397.00
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3	Add lines 1 and 2		3	397.00
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-		5	397.00
6	Credits/Payments			
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a 205.00		
b	Exempt foreign organizations-tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments Add lines 6a through 6d		7	205.00
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶		9	192.00
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 2011 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		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶$ ______ (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? *If "Yes," attach a detailed description of the activities*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
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		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ FLORIDA			
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	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
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		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ NORTHERN TRUST, N.A. Telephone no ▶ (312) 630-6000

Located at ▶ PO BOX 803878, CHICAGO, IL ZIP + 4 ▶ 60680

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

			Yes	No
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		X
	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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
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 22 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 2010?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ____ , ____ , ____ , ____			
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 22 of the instructions.)	2b		X
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ ____ , ____ , ____ , ____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	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? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?	4b		X

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see 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: X

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
GIVEN CHASE 14324 WEST THORNE LANE LAKEWOOD, WA 98498	CO-TRUSTEE	0.00	0.00	0.00

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 ▶ NONE

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 ▶		

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 NONE	
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 NONE	
2	
All other program-related investments See page 24 of the instructions 3 NONE	
Total. Add lines 1 through 3 ▶	

JSA
0E1465 1 000

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	692,955.00
b	Average of monthly cash balances	1b	24,794.00
c	Fair market value of all other assets (see page 25 of the instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	717,749.00
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	717,749.00
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see page 25 of the instructions)	4	10,766.24
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	706,982.76
6	**Minimum investment return.** Enter 5% of line 5	6	35,349.14

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	35,349.14
2a	Tax on investment income for 2010 from Part VI, line 5	2a	397.00		
b	Income tax for 2010 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	397.00
3	Distributable amount before adjustments Subtract line 2c from line 1			3	34,952.14
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	34,952.14
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	34,952.14

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	32,178.00
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	32,178.00
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	397.00
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	31,781.00

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

Part XIII Undistributed Income (see 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				34,952.14
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only				
b Total for prior years 20____,20____,20____				
3 Excess distributions carryover, if any, to 2010				
a From 2005				
b From 2006				
c From 2007				
d From 2008				
e From 2009				
f **Total** of lines 3a through e				
4 Qualifying distributions for 2010 from Part XII, line 4 ▶ $ 32,178.00				
a Applied to 2009, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required - see page 26 of the instructions)				
d Applied to 2010 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2010 *(If an amount appears in column (d), the same amount must be shown in column (a).)*				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount - see page 27 of the instructions				
e Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount - see page 27 of the instructions				
f Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011				34,952.14
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)				
8 Excess distributions carryover from 2005 not applied on line 5 or line 7 (see page 27 of the instructions)				
9 **Excess distributions carryover to 2011.** Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2006				
b Excess from 2007				
c Excess from 2008				
d Excess from 2009				
e Excess from 2010				

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 foundation 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 foundation had $5,000 or more in assets at any time during the year - see page 28 of the instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000) (See section 507(d)(2))

N/A

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

N/A

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

N/A

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

N/A

c Any submission deadlines

N/A

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

N/A

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 ATTACHED				32,178.00
Total ▶ 3a				32,178.00
b *Approved for future payment*				
Total ▶ 3b				

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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					
4 Dividends and interest from securities			14	24,835.00	
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	18,959.00	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a SEC 1250 GAIN			14	3.00	
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				43,797.00	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 43,797.00

(See worksheet in line 13 instructions on page 29 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 foundation's exempt purposes (other than by providing funds for such purposes) (See page 29 of the instructions)
	N/A

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)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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

Signature of officer or trustee: [signature] Date: 9/19/11 Title: Trustee

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check ☒ if self-employed	PTIN
	ALBERT C RAWSON III	[signature]	8/24/[illegible]		P00219967
	Firm's name ▶ ALBERT C RAWSON III, CPA			Firm's EIN ▶ 59-2118251	
	Firm's address ▶ 808-A NW 16TH AVENUE GAINESVILLE, FL 32601			Phone no 352-375-6608	

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JOHN & CATHERINE SHULER CHARITABLE TRUST
Supplemental Schedules
2010

Page 1, Part 1 – Analysis of Revenues & Expenses

Line 11 – Other Income

Sec 1250 Gain	$ 3

Line 16b – Accounting Fees

Tax Preparation Fee	$ 1,000

Line 16c – Other Professional Fees

Trustee Fees	$ 2,866

Line 18 – Taxes

Foreign Taxes	$ 245

Page 2, Part - Analysis of Change In Fund Balance

Line 5 – Other Decreases

OID Adjustment	$ 1,017

JOHN & CATHERINE SHULER CHARITABLE TRUST
Schedule D Detail of Short-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Short-term Gain/Loss
50. KOHLS CORP	01/29/2009	01/12/2010	2,572.81	1,964.15	608.66
40. ABB LTD SPONSORED ADR	10/22/2009	02/01/2010	734.79	852.59	-117.80
40. ALTERA CORP	04/02/2009	02/01/2010	868.39	711.83	156.56
10. AMAZON COM INC	05/27/2009	02/01/2010	1,197.98	786.14	411.84
15. BHP LTD SPONSORED ADR	05/19/2009	02/01/2010	1,063.19	806.90	256.29
25. CVS CORP	08/19/2009	02/01/2010	816.49	864.29	-47.80
25. CUMMINS ENGINE INC	09/02/2009	02/01/2010	1,162.99	1,124.87	38.12
15. FEDEX CORP	12/08/2009	02/01/2010	1,201.78	1,349.33	-147.55
15. FRANKLIN RESOURCES INC	01/12/2010	02/01/2010	1,509.73	1,657.09	-147.36
15. GOLDMAN SACHS GROUP INC	04/02/2009	02/01/2010	2,276.07	1,711.37	564.70
3. GOOGLE INC CL A	05/27/2009	02/01/2010	1,603.42	1,226.29	377.13
65. JOHNSON CONTROLS INC	01/12/2010	02/01/2010	1,842.08	1,931.78	-89.70
25. MCKESSON HBOC INC	12/08/2009	02/01/2010	1,487.98	1,527.23	-39.25
15. MOSAIC CO COM	05/27/2009	02/01/2010	832.04	845.31	-13.27
20. NIKE INC CLASS B	01/12/2010	02/01/2010	1,284.78	1,294.46	-9.68
10. NOBLE ENERGY INC	04/17/2009	02/01/2010	754.59	616.91	137.68
38.67 MFB NORTHN MID CAP INDEX					
FD FD	03/19/2009	02/01/2010	363.11	243.62	119.49
3698.82 MFB NORTHN INTL EQTY					
INDEX FD	08/19/2009	02/01/2010	35,730.56	34,362.00	1,368.56
25. QUALCOMM INC	09/02/2009	02/01/2010	969.74	1,138.21	-168.47
35. THE TRAVELERS COMPANIES	11/09/2009	02/01/2010	1,777.28	1,872.56	-95.28
25. UNITEDHEALTH GROUP INC	12/15/2009	02/01/2010	828.99	780.57	48.42
15. WELLS FARGO & CO NEW	05/27/2009	02/01/2010	434.70	377.18	57.52
15. GOLDMAN SACHS GROUP INC	04/02/2009	02/04/2010	2,282.78	1,665.33	617.45
60. MOSAIC CO COM	02/22/2010	04/27/2010	3,096.48	3,495.16	-398.68
50. QUALCOMM INC	09/02/2009	04/27/2010	1,914.08	2,276.41	-362.33
85. ABB LTD SPONSORED ADR	10/22/2009	05/05/2010	1,550.23	1,811.76	-261.53
45. CVS CORP	08/19/2009	06/11/2010	1,417.41	1,555.72	-138.31
60. JOHNSON CONTROLS INC	01/12/2010	08/05/2010	1,777.18	1,658.10	119.08
13.25 PIMCO COMMODITY					
REALRETURN STRATEGY FUND	02/05/2010	12/28/2010	123.36	101.89	21.47
75. SYSCO CORP	06/11/2010	12/28/2010	2,175.71	2,307.68	-131.97
Totals			75,651.00	72,917.00	2,734.00

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JOHN & CATHERINE SHULER CHARITABLE TRUST
Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
15% RATE CAPITAL GAINS (LOSSES)					
100. ITT INDS INC	04/21/2006	01/12/2010	4,988.68	5,574.70	-586.02
100. J P MORGAN CHASE & CO	04/03/2008	01/12/2010	4,349.61	4,568.98	-219.37
25. ABBOTT LABORATORIES	08/28/2007	02/01/2010	1,335.73	1,292.25	43.48
50. ADOBE SYS INC	01/07/2008	02/01/2010	1,614.48	2,009.22	-394.74
25. AIR PRODUCTS & CHEMICALS	12/14/2007	02/01/2010	1,895.98	2,557.96	-661.98
10. APPLE COMPUTER INC	01/26/2007	02/01/2010	1,943.88	856.51	1,087.37
25. CHEVRONTEXACO CORP	09/08/2008	02/01/2010	1,816.98	2,050.73	-233.75
125. CISCO SYS INC	02/24/1998	02/01/2010	2,827.96	1,371.09	1,456.87
20. COSTCO WHSL CORP NEW	01/18/2008	02/01/2010	1,154.39	1,301.14	-146.75
35. DANAHER CORP	10/21/2008	02/01/2010	2,505.97	2,423.21	82.76
40. WALT DISNEY CO	08/28/2007	02/01/2010	1,181.98	1,346.40	-164.42
35. EMERSON ELECTRIC CO	01/12/2007	02/01/2010	1,480.13	1,542.54	-62.41
40. EXXON MOBIL CORP	09/08/2008	02/01/2010	2,633.57	3,304.65	-671.08
50. FPL GROUP INC	07/28/2008	02/01/2010	2,441.47	3,194.21	-752.74
90. GENERAL ELECTRIC CO	04/22/1994	02/01/2010	1,455.28	724.88	730.40
40. HEWLETT PACKARD CO COM	08/06/2007	02/01/2010	1,893.58	1,907.60	-14.02
20. INTL BUSINESS MACHINES	08/11/2008	02/01/2010	2,487.17	2,563.52	-76.35
50. J P MORGAN CHASE & CO	02/05/2008	02/01/2010	1,971.97	2,200.00	-228.03
25. JOHNSON & JOHNSON	09/26/1986	02/01/2010	1,576.98	99.27	1,477.71
25. KELLOGG CO	02/08/2007	02/01/2010	1,369.23	1,225.87	143.36
25. MEDCO HEALTH SOLUTIONS INC	03/05/2008	02/01/2010	1,557.98	1,072.75	485.23
85. MICROSOFT CORP COM	02/24/1998	02/01/2010	2,382.52	1,774.38	608.14
25. NATIONAL-OILWELL INC	11/26/2007	02/01/2010	1,047.24	1,689.25	-642.01
2081.78 MFB NORTHN MID CAP INDEX					
FD FD	09/19/2008	02/01/2010	19,547.89	22,691.70	-3,143.81
35. PEPSICO INC	05/17/2005	02/01/2010	2,100.32	1,970.85	129.47
25. PROCTER & GAMBLE CO	09/25/1997	02/01/2010	1,544.48	837.61	706.87
75. CHARLES SCHWAB CORP NEW	09/08/2008	02/01/2010	1,382.23	1,833.07	-450.84
25. SIGMA ALDRICH CORP	10/29/2008	02/01/2010	1,209.98	946.70	263.28
85. SPECTRA ENERGY CORP COM	08/14/2008	02/01/2010	1,830.03	2,214.67	-384.64
25. SUNCOR ENERGY INC NEW COM	07/18/2007	02/01/2010	800.24	1,174.99	-374.75
35. TJX COS INC NEW	05/07/2008	02/01/2010	1,353.78	1,128.73	225.05
Totals					

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JOHN & CATHERINE SHULER CHARITABLE TRUST
Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
35. TEVA PHARMACEUTICALS INDS					
LTD ADR	01/14/2009	02/01/2010	1,983.07	1,490.41	492.66
65. US BANCORP DEL NEW	05/13/2008	02/01/2010	1,637.33	2,218.36	-581.03
15. UNITED TECHNOLOGIES CORP	05/12/2004	02/01/2010	1,012.94	620.63	392.31
25. VERIZON COMMUNICATIONS	08/06/2007	02/01/2010	739.74	1,073.78	-334.04
45. WAL MART STORES INC	09/08/2008	02/01/2010	2,414.22	2,760.26	-346.04
50. WELLS FARGO & CO NEW	08/28/2007	02/01/2010	1,448.98	1,780.50	-331.52
15. COVIDIEN PLC	01/14/2009	02/01/2010	753.14	537.15	215.99
10. TRANSOCEAN LTD	11/15/2005	02/01/2010	877.09	588.00	289.09
25. MEDCO HEALTH SOLUTIONS INC	03/05/2008	02/04/2010	1,542.83	1,072.75	470.08
50. CHARLES SCHWAB CORP NEW	09/08/2008	02/04/2010	890.69	1,222.05	-331.36
45. WAL MART STORES INC	09/08/2008	02/04/2010	2,404.06	2,760.27	-356.21
50000. FEDERAL HOME LN BKS DTD	05/03/2000	02/12/2010	50,000.00	50,000.00	
50. AIR PRODUCTS & CHEMICALS	09/04/2007	02/22/2010	3,487.63	4,523.00	-1,035.37
28. SIGMA ALDRICH CORP	10/29/2008	03/22/2010	1,518.25	1,060.30	457.95
17. SIGMA ALDRICH CORP	10/29/2008	03/23/2010	917.10	643.76	273.34
5. SIGMA ALDRICH CORP	10/29/2008	03/24/2010	268.59	189.34	79.25
20. GOLDMAN SACHS GROUP INC	03/19/2009	05/03/2010	2,975.13	2,097.65	877.48
25. TRANSOCEAN LTD	11/15/2005	05/03/2010	1,749.95	1,470.00	279.95
35. HEWLETT PACKARD CO COM	08/06/2007	05/07/2010	1,650.42	1,669.15	-18.73
723.74 MFB NORTHERN FDS GLOBAL					
REAL ESTATE INDEX FD	11/07/2006	05/07/2010	5,030.00	8,149.31	-3,119.31
692.27 MFB NORTHN FUNDS					
EMERGING MKTS EQTY EQTY IN	09/19/2008	05/07/2010	7,165.00	7,146.78	18.22
1726.55 PIMCO COMMODITY					
REALRETURN STRATEGY FUND	03/19/2009	05/07/2010	13,329.00	10,929.06	2,399.94
25. TEVA PHARMACEUTICALS INDS					
LTD ADR	02/12/2009	05/07/2010	1,444.89	1,068.75	376.14
10. ABBOTT LABORATORIES	08/28/2007	06/03/2010	476.12	516.90	-40.78
25. BHP LTD SPONSORED ADR	05/19/2009	06/03/2010	1,587.07	1,344.82	242.25
25. ADOBE SYS INC	01/07/2008	06/11/2010	785.90	1,004.61	-218.71
40. MICROSOFT CORP COM	02/24/1998	06/11/2010	1,015.94	835.00	180.94
18. FRONTIER COMMUNICATIONS					
CORP COM	08/06/2007	07/12/2010	129.42	203.43	-74.01
Totals					

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JOHN & CATHERINE SHULER CHARITABLE TRUST

Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
143.63 MFB NORTHERN FDS GLOBAL					
REAL ESTATE INDEX FD	11/07/2006	08/05/2010	1,083.00	1,617.27	-534.27
79.11 MFB NORTHN MULTI-MANAGER					
INTL EQTY FD FD	10/29/2008	08/05/2010	708.00	518.17	189.83
396.59 MFB NORTHN FUNDS					
EMERGING MKTS EQTY EQTY IN	09/19/2008	08/05/2010	4,529.00	4,029.36	499.64
75. VERIZON COMMUNICATIONS	08/06/2007	08/05/2010	2,212.46	3,017.90	-805.44
22. KELLOGG CO	02/08/2007	08/18/2010	1,119.87	1,078.77	41.10
14. KELLOGG CO	02/08/2007	08/19/2010	698.04	686.49	11.55
14. KELLOGG CO	02/08/2007	08/20/2010	695.08	686.49	8.59
19000. PEPSICO INC 7.9% DUE					
11-01-2018 11-01-2018/10-2	10/22/2008	11/02/2010	25,521.56	19,957.22	5,564.34
25. CUMMINS ENGINE INC	09/02/2009	12/20/2010	2,707.10	1,124.88	1,582.22
65. TJX COS INC NEW	05/07/2008	12/20/2010	2,841.82	2,096.21	745.61
75. ADOBE SYS INC	01/07/2008	12/28/2010	2,309.96	3,013.83	-703.87
10. ALTERA CORP	04/02/2009	12/28/2010	358.99	177.96	181.03
10. AMAZON COM INC	04/17/2009	12/28/2010	1,811.87	778.30	1,033.57
5. APPLE COMPUTER INC	05/27/2009	12/28/2010	1,626.17	667.81	958.36
10. CHEVRONTEXACO CORP	09/08/2008	12/28/2010	913.38	804.55	108.83
140. CISCO SYS INC	02/24/1998	12/28/2010	2,841.95	1,535.63	1,306.32
20. DANAHER CORP	10/21/2008	12/28/2010	943.78	581.10	362.68
50. HEWLETT PACKARD CO COM	01/14/2009	12/28/2010	2,115.96	2,014.27	101.69
10. INTL BUSINESS MACHINES	08/11/2008	12/28/2010	1,457.98	1,275.03	182.95
90.51 MFB NORTHERN FDS GLOBAL					
REAL ESTATE INDEX FD	11/07/2006	12/28/2010	744.00	1,019.14	-275.14
1964.77 MFB NORTHN MULTI-MANAGER					
INTL EQTY FD FD	10/29/2008	12/28/2010	19,353.00	12,869.24	6,483.76
807.01 MFB NORTHN HI YIELD FXD					
INC FD	04/17/2009	12/28/2010	5,875.00	6,226.68	-351.68
100. PG&E CORP	01/14/2009	12/28/2010	4,809.92	4,460.88	349.04
179.77 PIMCO COMMODITY					
REALRETURN STRATEGY FUND	03/19/2009	12/28/2010	1,673.64	1,137.94	535.70
25. SUNCOR ENERGY INC NEW COM	07/18/2007	12/28/2010	934.48	1,174.99	-240.51
10. COVIDIEN PLC	01/14/2009	12/28/2010	457.19	358.10	99.09
Totals					

JOHN & CATHERINE SHULER CHARITABLE TRUST

Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
TOTAL 15% RATE CAPITAL GAINS (LOSSES)			277,259.00	261,334.00	15,926.00
Totals			277,259.00	261,334.00	15,926.00

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03/11/10	CHECK PAYMENT TO CITY OF CLIVE PUBLIC AR T PROGRAM 2010 GIFT TR TRAN#=05265 TR CD=750 REG=0 PORT=PRIN	-10000.00	-10000.00	1003000014
12/20/10	CHECK PAYMENT TO CARE & SHARE FOOD BANK OF SOUTHERN CO 2010 GIFT FROM STEVE AND HOLLIS SHUMWAY TR TRAN#=04557 TR CD=750 REG=0 PORT=PRIN	-696.00	-696.00	1012000043
12/20/10	CHECK PAYMENT TO CATLIN GABLE SCHOOL IN MEMORY & HONOR OF MRS. ESTHER JONSKE AND KARL JONSKE 2010 GIFT FROM WILLIAM RAWSON TR TRAN#=04542 TR CD=750 REG=0 PORT=PRIN	-1000.00	-1000.00	1012000028
12/20/10	CHECK PAYMENT TO LAKEWOLD GARDENS 2010 GIFT FROM GIVIN & NANCY CHASE - FOR THE AREA OF MOST NEED. TR TRAN#=04540 TR CD=750 REG=0 PORT=PRIN	-772.50	-772.50	1012000026
12/20/10	CHECK PAYMENT TO FRIENDS OF WASHOE 2010 GIFT FROM GIVIN & NANCY CHASE - FOR THE AREA OF MOST NEED TR TRAN#=04541 TR CD=750 REG=0 PORT=PRIN	-772.50	-772.50	1012000027
12/20/10	CHECK PAYMENT TO OREGON PUBLIC BROADCAST ING 2010 GIFT FROM WILLIAM RAWSON TR TRAN#=04543 TR CD=750 REG=0 PORT=PRIN	-500.00	-500.00	1012000029
12/20/10	CHECK PAYMENT TO WORLD AFFAIRS COUNCIL O F OREGON 2010 GIFT FROM WILLIAM RAWSON TR TRAN#=04544 TR CD=750 REG=0 PORT=PRIN	-1000 00	-1000.00	1012000030
12/20/10	CHECK PAYMENT TO UNITED WAY OF CENTRAL M INNESOTA 2010 GIFT FROM DAVID S. AND SYLVIA E. CHASE. TR TRAN#=04537 TR CD=750 REG=0 PORT=PRIN	-5545.00	-5545.00	1012000023
12/20/10	CHECK PAYMENT TO MARY BRIDGE CHILDREN'S FOUNDATION 2010 GIFT FROM GIVIN & NANCY CHASE - FOR THE AREA OF MOST NEED TR TRAN#=04538 TR CD=750 REG=0 PORT=PRIN	-2500.00	-2500.00	1012000024
12/20/10	CHECK PAYMENT TO SARASOTA MEMORIAL HEALT HCARE FOUNDATION 2010 GIFT FROM GIVIN & NANCY CHASE - 100% FOR PSYCHIATRIC CARE SERVICES TR TRAN#=04539 TR CD=750 REG=0 PORT=PRIN	-1500.00	-1500.00	1012000025
12/20/10	CHECK PAYMENT TO THE OREGON STUDENT ASSI STANCE COMMISSION 2010 GIFT FROM WILLIAM RAWSON TR TRAN#=04545 TR CD=750 REG=0 PORT=PRIN	-500.00	-500.00	1012000031
12/20/10	CHECK PAYMENT TO PORTLAND RESCUE MISSION 2010 GIFT FROM WILLIAM RAWSON TR TRAN#=04546 TR CD=750 REG=0 PORT=PRIN	-696.00	-696.00	1012000032
12/20/10	CHECK PAYMENT TO SUMMIT FOUNDATION 2010 GIFT FROM STEVE AND HOLLIS SHUMWAY TR TRAN#=04547 TR CD=750 REG=0 PORT=PRIN	-1000.00	-1000.00	1012000033
12/20/10	CHECK PAYMENT TO T.E.S.S.A 2010 GIFT FROM STEVE AND HOLLIS SHUMWAY TR TRAN#=04548 TR CD=750 REG=0 PORT=PRIN	-1000.00	-1000.00	1012000034
12/20/10	CHECK PAYMENT TO HUMANE SOCIETY OF PIKES PEAK REGION 2010 GIFT FROM STEVE AND HOLLIS SHUMWAY TR TRAN#=04549 TR CD=750 REG=0 PORT=PRIN	-500.00	-500.00	1012000035
12/20/10	CHECK PAYMENT TO EL PASO COUNTY SEARCH & RESCUE 2009 GIFT FROM STEVE AND HOLLIS SHUMWAY TR TRAN#=04550 TR CD=750 REG=0 PORT=PRIN	-500.00	-500.00	1012000036
12/20/10	CHECK PAYMENT TO HIPPIDROME STATE THEATE R 2010 GIFT FROM ALBERT CUMMINS RAWSON III TR TRAN#=04551 TR CD=750 REG=0 PORT=PRIN	-500.00	-500.00	1012000037
12/20/10	CHECK PAYMENT TO BIG BROTHERS/BIG SISTER S OF MID-FLORIDA 2010 GIFT FROM ALBERT CUMMINS RAWSON III TR TRAN#=04552 TR CD=750 REG=0 PORT=PRIN	-500.00	-500.00	1012000038
12/20/10	CHECK PAYMENT TO CULVER MILITARY ACADEMY 2010 GIFT FROM ALBERT CUMMINS RAWSON III TR TRAN#=04553 TR CD=750 REG=0 PORT=PRIN	-500.00	-500.00	1012000039
12/20/10	CHECK PAYMENT TO RIDGE CREEK SCHOOL 2010 GIFT FROM ALBERT CUMMINS RAWSON III TR TRAN#=04554 TR CD=750 REG=0 PORT=PRIN	-500.00	-500.00	1012000040
12/20/10	CHECK PAYMENT TO DARLINGTON SCHOOL 2010 GIFT FROM ALBERT CUMMINS RAWSON III TR TRAN#=04555 TR CD=750 REG=0 PORT=PRIN	-500.00	-500.00	1012000041
12/20/10	CHECK PAYMENT TO FLORIDA UNITED METHODIS T CHILDREN'S HOME 2010 GIFT FROM ALBERT CUMMINS RAWSON III TR TRAN#=04556 TR CD=750 REG=0 PORT=PRIN	-1196.00	-1196.00	1012000042

Form **8868**
(Rev January 2011)
Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ **File a separate application for each return.**

OMB No 1545-1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box . . . . ▶ ☐
- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** (on page 2 of this form)

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

Electronic filing *(e-file)*. You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions) For more details on the electronic filing of this form, visit *www irs gov/efile* and click on *e-file for Charities & Nonprofits*

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

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only . . . . ▶ ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Type or print	Name of exempt organization JOHN & CATHERINE SHULER CHARITABLE TRUST (23-37498)	**Employer identification number** 42-6076704
File by the due date for filing your return See instructions	Number, street, and room or suite no If a P O box, see instructions PO BOX 803878	
	City, town or post office, state, and ZIP code For a foreign address, see instructions CHICAGO,IL 60680	

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ▶ GREGORY COLBY

Telephone No ▶ 941-486-4808 FAX No ▶ 941-484-7898

- If the organization does not have an office or place of business in the United States, check this box . . . . ▶ ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ If this is for the whole group, check this box . . . . . . ▶ ☐ If it is for part of the group, check this box . . . . ▶ ☐ and attach a list with the names and EINs of all members the extension is for

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 20 11, to file the exempt organization return for the organization named above The extension is for the organization's return for
▶ ☒ calendar year 20 10 or
▶ ☐ tax year beginning ______, 20 ___, and ending ______, 20 ___

2 If the tax year entered in line 1 is for less than 12 months, check reason ☐ Initial return ☐ Final return
☐ Change in accounting period

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions	**3a**	$ 0.00
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit	**3b**	$ 0.00
c	**Balance Due.** Subtract line 3b from line 3a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	**3c**	$

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

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

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

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

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

Type or print	Name of exempt organization	**Employer identification number**
File by the extended due date for filing your return See instructions	JOHN & CATHERINE SHULER CHARITABLE TRUST (23-37498)	42-6076704
	Number, street, and room or suite no If a P O box, see instructions	
	PO BOX 803878	
	City, town or post office, state, and ZIP code For a foreign address, see instructions	
	CHICAGO, IL 60680	

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

Application Is For	**Return Code**	**Application Is For**	**Return Code**
Form 990	01		
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

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

- The books are in the care of ▶ ____________________

Telephone No ▶ ____________________ FAX No ▶ ____________________

- If the organization does not have an office or place of business in the United States, check this box . . . . ▶ ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ________ If this is for the whole group, check this box . . . . . . ▶ ☐ If it is for part of the group, check this box . . . . ▶ ☐ and attach a list with the names and EINs of all members the extension is for

4 I request an additional 3-month extension of time until ____________________, 20____

5 For calendar year ______, or other tax year beginning ____________________, 20____, and ending ____________________, 20____

6 If the tax year entered in line 5 is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period

7 State in detail why you need the extension ____________________

8a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions	**8a**	$
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	**8b**	$
c	**Balance Due.** Subtract line 8b from line 8a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	**8c**	$

Signature and Verification

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

Signature ▶ Title ▶ CPA Date ▶ 05/09/2011