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

OMB No 1545-0052

2011

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

			ang enging				
Na	ame of fou	undation			A Emplo	yer identification number	
F	ЕТС	HUM CHARITABLE FOUNDATION INC	26.	-2189909			
_		d street (or P O box number if mail is not delivered to street address)		Room/suite	+	ione number (see instructions)	
		E SKELLY DR STE. 1040				(220 1101120110110)	
		n, state, and ZIP code	· · · · · · · · · · · · · · · · · · ·		C If exen	nption application is pending, cl	
	'ULS	A OK 74135			C II exem	nption application is pending, or	neck nere
G	Check a	all that apply Initial return Initial retur	rn of a former public c	hanty	D 1. For	reign organizations, check here	▶ [_]
		Final return Amended	return		2. Fo	reign organizations meeting the	,
_		Address change Name cha			859	% test, check here and attach of	computation
Н.		type of organization \mathbf{X} Section 501(c)(3) exempt private	foundation		E If priva	ite foundation status was termir	nated under
L	Section	n 4947(a)(1) nonexempt charitable trust Other taxable	e private foundation	<u>,,,</u>	section	n 507(b)(1)(A), check here	▶ ∐
I F	aır mar	rket value of all assets at J Accounting method	X Cash Ac	crual	F If the fe	oundation is in a 60-month tem	nination
	-	ear (from Part II, col (c), Other (specify)			under	section 507(b)(1)(B), check her	• ▶ [_]
	ne 16)		be on cash basis)		<u> </u>		
۲	art I	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal	(a) Revenue and expenses per	(b) Net inv	vestment	(c) Adjusted net	(d) Disbursements for chantable
		the amounts in column (a) (see instructions))	books	inco	me	ıncome	purposes (cash basis only)
	1	Contributions, gifts, grants, etc , received (attach schedule)	2,600,00	0			,
2012	2	Check ▶ ☐ If the foundation is not required to attach Sch B					
	3	Interest on savings and temporary cash investments	4,34	6	4,346	4,346	
0	4	Dividends and interest from securities	128,04	8 1	28,048	128,048	
.73	5a	Gross rents					
SCAINED AUG Revenue	b	Net rental income or (loss)					
	6a	Net gain or (loss) from sale of assets not on line 10	68,27	4			
	b	Gross sales price for all assets on line 6a 9, 159, 054					
<u>₹</u> ~	7	Capital gain net income (from (Part IV; line 2))			68,274		
Ž	8	Net short-term capital gain Income modifications Gross sales less returns & allowances 4 2012		1		0	······································
3	9	Income modifications Gross sales less returns & allowances 4 2012					
9	10a b	Less Cost of goods sold					
	"	Gross profit or (loss) (attack schedule)					
	11	Other income (attach schedule) STMT 1	-13,17	7 -	13,177	-13,177	***************************************
	12	Total. Add lines 1 through 11	2,787,49		87,491	119,217	
	13	Compensation of officers, directors, trustees, etc		0		==- /== :	· · · · · · · · · · · · · · · · · · ·
xpenses	14	Other employee salaries and wages		<u> </u>			37
ens	15	Pension plans, employee benefits					
ă	16a	Legal fees (attach schedule)					
E E	ь	Accounting fees (attach schedule) STMT 2	5,65	8			
tίχ	С	Other professional fees (attach schedule)		ļ			
tra	17	Interest	· · · · · · · · · · · · · · · · · · ·				
jisi	18	Taxes (attach schedule) (see instructions) STMT 3	61	8			
Ē	19	Depreciation (attach schedule) and depletion		 			
Adi	20	Occupancy		+			
Ď	21	Travel, conferences, and meetings	 	+			
a	22	Printing and publications Other expenses (att sch.) STMT 4	25 60		35 600	3E 600	
Operating and Administrative	23 24	, , ,	35,69		35,690	35,690	
rati	24	Total operating and administrative expenses. Add lines 13 through 23	41,96	6	35,690	35,690	0
be	25	Contributions, gifts, grants paid	138,89		33,030	33,090	138,896
0	26	Total expenses and disbursements. Add lines 24 and 25	180,86		35,690	35,690	138,896
_	27	Subtract line 26 from line 12		1	,	23,030	255,656
	- · a	Excess of revenue over expenses and disbursements	2,606,62	9			
	b	Net investment income (if negative, enter -0-)			51,801		
	С	Adjusted net income (if negative, enter -0-)				83,527	
For	Paper	work Reduction Act Notice, see instructions.					Form 990-PF (2011)

SEE STATEMENT 8

6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30

Form 990-PF (2011)

10,042,856

373,136

9,669,720

4

5

3 Other increases not included in line 2 (itemize)

5 Decreases not included in line 2 (itemize)

4 Add lines 1, 2, and 3

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

1,38<u>4,533</u>

138,896

7

8

7 Add lines 5 and 6

Part VI instructions

8 Enter qualifying distributions from Part XII, line 4

	990-PF (2011) KETCHUM CHARITABLE FOUNDATION INC 26-2189909				P	age 4
Pa	Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)					
1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1.					
	Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)	-			_	
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check	1			3,(036
	here and enter 1% of Part I, line 27b	I				
С	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			3,	036
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			3,	036
6	Credits/Payments					
а	2011 estimated tax payments and 2010 overpayment credited to 2011 6a 250					
b	Exempt foreign organizations—tax withheld at source					
C	Tax paid with application for extension of time to file (Form 8868)					
d	Backup withholding erroneously withheld 6d	-				
7	Total credits and payments Add lines 6a through 6d	7				250
8	Enter any penalty for underpayment of estimated tax. Check here If Form 2220 is attached	8				22
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9			2,	<u>808</u>
10		10				
<u> 11_</u>		11				
	rt VII-A Statements Regarding Activities					
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it				Yes	No
	participate or intervene in any political campaign?			1a		<u> </u>
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		ŀ		- 1	
	published or distributed by the foundation in connection with the activities		ŀ		- 1	
С	Did the foundation file Form 1120-POL for this year?			1c		<u> </u>
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 > \$				1	
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?			2		X
_	If "Yes," attach a detailed description of the activities					
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of				1	
	incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes			3		<u>X</u>
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		,_	4a		<u> </u>
b	If "Yes," has it filed a tax return on Form 990-T for this year?	N,	/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		ļ	5		X
_	If "Yes," attach the statement required by General Instruction T.			- 1		
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either		Ţ			
	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 instructions) ► OK					
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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? 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		Ī			
	names and addresses STMT 9			10	X	
			F	om 99	0-PF	(2011)

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Pŧ	art 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 instructions)			11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified					
	person had advisory privileges? If "Yes," attach statement (see instructions)			12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application	1?		13	X	
	Website address ► N/A					
14		phone no 🕨	918-6	33-	264	9
	31 HALLBROOK WAY					
	Located at ► SPRING TX	ZIP+4 ▶	77389)		
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			
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority				Yes	No
	over a bank, securities, or other financial account in a foreign country?			16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of					
	the foreign country ▶					
Pa	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	Dunng the year did the foundation (either directly or indirectly)		_		1	
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes	X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a	<u></u>				
	disqualified person?	Yes	X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes	X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes	X 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	X 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				ı	
	termination of government service, if terminating within 90 days)	Yes	X 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	3	/-			
	section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?		N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here		▶ [_]			
С	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that		/-		1	
_	were not corrected before the first day of the tax year beginning in 2011?		N/A	1c		
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private				Ī	
_	operating foundation defined in section 4942(j)(3) or 4942(j)(5))					-
а	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and		ਓ			
	6e, Part XIII) for tax year(s) beginning before 2011?	Yes	X No		1	
h	If "Yes," list the years > 20 , 20 , 20 , 20					
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2)					
	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to		N/A		ŧ	
С	all years listed, answer "No" and attach statement—see instructions) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		N/A	2b		
·	► 20 , 20 , 20 , 20 , 20					
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise					
-	at any time during the year?	Yes	X No			
b	If "Yes," did it have excess business holdings in 2011 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				I	
	Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of				I	
	the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the				I	
	foundation had excess business holdings in 2011)		N/A	3ь	Ī	:
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		-1/ 53	4a		<u> </u>
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its			a		
-	chantable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011	?		4b	Ī	X

		ARITABLE FOUNDATION		189909			Page 6
Pa	irt VII-B Statements Regar	ding Activities for Which Form	<u>m 4720 May Be Re</u>	equired (contin	nued)	·····	
5a	During the year did the foundation pay	or incur any amount to		_			
	(1) Carry on propaganda, or otherwise	attempt to influence tegislation (section	4945(e))?	\ \	'es 🗶 No		
	(2) Influence the outcome of any speci	fic public election (see section 4955), or	to carry on,				
	directly or indirectly, any voter regis	stration drive?		\vdash	es X No		ı
	•	travel, study, or other similar purposes?			′es 🏻 No		1
	• •	other than a chantable, etc , organization	n described in		. 🖼		
	section 509(a)(1), (2), or (3), or sec			[\ \	res 🗓 No		
	• • • • • • • • • • • • • • • • • • • •	religious, chantable, scientific, literary,	or educational	<u>.</u>	. .		I
	purposes, or for the prevention of c	-			res 🗓 No		
b	•	any of the transactions fail to qualify un		inbed in	N/A		1
	_	rrent notice regarding disaster assistance			N/A	5b	
	• •	ce regarding disaster assistance check h					
C	· ·	, does the foundation claim exemption f	rom tne tax	N/A 🗌	(DN-		
	because it maintained expenditure resp			N/A []	∕es ∐ No		
_	If "Yes," attach the statement required						1
6a		eive any funds, directly or indirectly, to p	bay premiums	\Box	res X No		I
L	on a personal benefit contract?	u promiumo, directhi er indirecthi en en	arcanal hanafit contract		∕es X No	6Ь	x
p		y premiums, directly or indirectly, on a pe	ersonal benefit contract	•		90	
7 .	If "Yes" to 6b, file Form 8870 At any time during the tax year, was the	o foundation a party to a prohibited tay s	halter transaction?		res X No		
	If Yes, did the foundation receive any p	• • •			N/A	7b	1
		Officers, Directors, Trustees,					
	and Contractors	J. 110010, 2.11001010, 1.1101000,		go. e, g , .		,	
1 1	List all officers, directors, trustees, fo	undation managers and their compe	nsation (see instruction	ons).			
			(b) Title, and average	(c) Compensation	(d) Contributions to		
	(a) Name a	nd address	hours per week	(If not paid, enter	employee benefit plans and deferred		ense account, allowances
			devoted to position	-0-)	compensation	Outci	
KE	EVIN B. KETCHUM	TULSA	PRESIDENT				
68	309 E. 109TH STREET	OK 74133	2.00	0	0		0
BF	RIAN C. KETCHUM	TULSA	VICE PRESIDE				
42	204 S. RETANA AVENUE	OK 74011	2.00	0	0		0
LE	EWIS C. KETCHUM	BROKEN ARROW	CHAIRMAN				
39	909 S. QUINOA	OK 74011	2.00	o	0		0
KE	ENT H. KETCHUM	SPRING	DIRECTOR				
31	HALLBROOK WAY	TX 77389	2.00	<u> </u>	0	<u> </u>	0
2	Compensation of five highest-paid	employees (other than those include	d on line 1—see instru	uctions). If none,	enter		
	"NONE."					,	
			(b) Title, and average	•	(d) Contributions to employee benefit	(e) Eyne	ense account,
	(a) Name and address of each employe	e paid more than \$50,000	hours per week devoted to position	(c) Compensation	plans and deferred		allowances
	<u> </u>				compensation		
N	ONE		- 1	1			
			· 		 	 	
					 	-	
			1				
				 	 	 -	
				 	 	 	
			-	}			
rot-	al number of other employees paid over	\$50,000	I	L	<u> </u>	<u> </u>	T 0
Ula	a number of other employees paid over	#30,000 ,				om 99	0-PF (2011)
							\2011)

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Part VIII	Information About Officers, Directors, Trustees, Foundation and Contractors (continued)		
3 Five highe	st-paid independent contractors for professional services (see instruction	ns). 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 o	others receiving over \$50,000 for professional services		•
Part IX-A	Summary of Direct Charitable Activities		
	four largest direct chantable activities during the tax year. Include relevant statistical information such as the beneficianes served, conferences convened, research papers produced, etc.	ne number of	Expenses
1 N/A			
2			
3			
Part IX-B	Summary of Program-Related Investments (see instruction	ns)	
	gest program-related investments made by the foundation during the tax year on lines 1 and 2		Amount
1 N/A			
2			
All other program-rel	lated investments. See instructions		
-			
Total. Add lines 1	through 3	•	

Form **990-PF** (2011)

orr	1 990-PF (2011) KETCHUM CHARITABLE FOUNDATION INC 26-2189909		Page 8
P	Minimum Investment Return (All domestic foundations must complete this part Foreign	foun	
	see instructions)		
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes		
а	Average monthly fair market value of securities	1a	8,384,326
þ	Average of monthly cash balances	1b	169,344
C	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	8,553,670
0	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	_ 2	0
3	Subtract line 2 from line 1d	3	8,553,670
4	Cash deemed held for charitable activities Enter 11/2% of line 3 (for greater amount, see		
	instructions)	4	128,305
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	8,425,365
6	Minimum investment return. Enter 5% of line 5	6	421,268
P	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating		
	foundations and certain foreign organizations check here		
1	Minimum investment return from Part X, line 6	1	421,268
2a	Tax on investment income for 2011 from Part VI, line 5		
b	Income tax for 2011 (This does not include the tax from Part VI)		
С	Add lines 2a and 2b	2c	3,036
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	418,232
4	Recoveries of amounts treated as qualifying distributions	4	* <u></u>
5	Add lines 3 and 4	5	418,232
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII,		
	line 1	7	418,232
p	Qualifying Distributions (see instructions)		,
1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
а	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	138,896
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		
а	Suitability test (prior IRS approval required)	3a	

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138,896

138,896

3b

4

6

b

Cash distribution test (attach the required schedule)

Adjusted qualifying distributions. Subtract line 5 from line 4

qualifies for the section 4940(e) reduction of tax in those years

Enter 1% of Part I, line 27b (see instructions)

Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation

Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income

	990-PF (2011) KETCHUM CHAR	ITABLE FOUN	DATION INC	26-218990	9	Page 9
Pa	irt XIII Undistributed Income	(see instructions)				
		-	(a)	(b)	(c)	(d)
1	Distributable amount for 2011 from Part XI,		Corpus	Years pnor to 2010	2010	2011
	line 7					418,232
2	Undistributed income, if any, as of the end	of 2011				
	Enter amount for 2010 only					
	Total for prior years 20 , 20				······	
3	Excess distributions carryover, if any, to 20	The state of the s	1			
а	From 2006	131,380	1			
b	- · · · · · · · · - · · · - · · · · · ·	33,182				
C	From 2008	579,143	1			
	From 2009	60,266	I			
e	From 2010	175,397	070 260			
4	Total of lines 3a through e	,,,	979,368			
4	Qualifying distributions for 2011 from Part > line 4 > \$ 138,896	VII,	1			
	line 4 ▶ \$ 138,896 Applied to 2010, but not more than line 2a		I			
	Applied to undistributed income of prior year	ure .				
	(Election required—see instructions)	115				
c	Treated as distributions out of corpus (Elec	tion				
•	required—see instructions)					
d	Applied to 2011 distributable amount					138,896
	Remaining amount distributed out of corpus	s				
5	Excess distributions carryover applied to 20	t	279,336	•		279,336
	(If an amount appears in column (d), the sa	ıme			•	
	amount must be shown in column (a))		1			
6	Enter the net total of each column as		1			
	indicated below:		1			
а	Corpus Add lines 3f, 4c, and 4e Subtract I	ine 5	700,032			
b	Prior years' undistributed income Subtract					:
	line 4b from line 2b					
С	Enter the amount of prior years' undistribute	ed				
	income for which a notice of deficiency has	Į.				
	been issued, or on which the section 4942(a)				
	tax has been previously assessed					
a	Subtract line 6c from line 6b Taxable					
_	amount—see instructions	_				
е	Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount—see	e				
	instructions		1			
f	Undistributed income for 2011 Subtract line	96				<u> </u>
•	4d and 5 from line 1. This amount must be		I			
	distributed in 2012		1			o
7	Amounts treated as distributions out of corp	ous				
	to satisfy requirements imposed by section					
	170(b)(1)(F) or 4942(g)(3) (see instructions	s) [
8	Excess distributions carryover from 2006 n	ot				
	applied on line 5 or line 7 (see instructions)					
9	Excess distributions carryover to 2012.					
	Subtract lines 7 and 8 from line 6a	ļ	700,032			
10	Analysis of line 9		I			
а	Excess from 2007		I			
b	Excess from 2008	464,369	1			
C	Excess from 2009	60,266	I			
d	Excess from 2010	175,397	#			

d Excess from 2010 e Excess from 2011

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

SEE STATEMENT 11

Supplementary Information (continued) Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Foundation Recipient show any relationship to Purpose of grant or status of Amount any foundation manager contribution recipient Name and address (home or business) or substantial contributor a Paid during the year UNITED WAY P.O. BOX 1859 TULSA OK 74101 CHARITABLE 75,000 MISSOURI STATE UNIVERSITY 901 S. NATIONAL AVENUE SPRINGFIELD MO 65897 EDUCATIONAL 20,000 THE 12TH MAN FOUNDATION P.O. BOX DRAWER L-1 EDUCATIONAL COLLEGE STATION TX 77844 9,240 AMERICAN HEART ASSOCIATION 2227 EAST SKELLY DRIVE **TULSA OK 74105** CHARITABLE 20,000 OSU FOUNDATION P.O. BOX 1749 STILLWATER OK 74076 EDUCATIONAL 6,656 GOLDEN HURRICAN CLUB AT TU 800 SOUTH TUCKER DRIVE EDUCATIONAL TULSA OK 74104 8,000 138,896 ▶ 3a Approved for future payment N/A ▶ 3b **Total**

Part XVI-A	2011) KETCHUM CHARITABLE FO Analysis of Income-Producing A			-2189909	<u> </u>	Page 1 2
nter gross am	ounts unless otherwise indicated		Unrelated business income Exclu			(a)
1 Program se	ervice revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	(e) Related or exempt function income (See instructions)
		_		-		
		-		1 1		
		-	•			
f						
g Fees a	nd contracts from government agencies					
Membershi	p dues and assessments					
	savings and temporary cash investments			14	4,346	
	and interest from securities	1		14	128,048	
	ncome or (loss) from real estate	<u> </u>		- -	-	· · · · · · · · · · · · · · · · · · ·
	nanced property					
	bt-financed property ncome or (loss) from personal property		· · · · · · · · · · · · · · · · · · ·			
	stment income			- -		-13,17
	ss) from sales of assets other than inventory			14	68,274	
	e or (loss) from special events				,	
	t or (loss) from sales of inventory					
Other revei	Other revenue a					
b			·			
		_				
d	·	_				
θ		_			222 552	40.45
	dd columns (b), (d), and (e)		<u>, </u>	0	200,668	-13,17
	line 12, columns (b), (d), and (e)				13	187,49
Part XVI-E	t in line 13 instructions to verify calculations) Relationship of Activities to the	Accomplishmen	t of Evennt	Purnosas		
Line No.	Explain below how each activity for which income				moortantly to the	
▼	accomplishment of the foundation's exempt put	•			•)
N/A			-	•		
	-					
				······		

Part XVII

Form 990-PF (2011)	KETCHUM	CHARITABLE	FOUNDATION	INC

٠,		,,, O,,,,,,									
lı	nformation	Regarding	Transfers	To and	Transact	ions and	Relat	ionships	With	Noncharit	able
_											

		<u>Exempt Organiza</u>	tions								
1 Did	the organ	nization directly or indire	ectly engage	in any of the follow	ing with any othe	r organization des	scribed			Yes	No
ın s	section 50	1(c) of the Code (other	than section	501(c)(3) organiza	tions) or in section	on 527, relating to	political			I	
	anizations					_				1	
_		m the reporting founda	tion to a none	chantable exempt o	organization of					Ī	
	Cash	m the reporting rounds		silaniasio oxompi e	ngamzation of				1a(1)	1	X
• •											X
	Other as								1a(2)		<u></u>
b Oth	ner transa	ctions							ļl	ŧ	77
(1)	Sales of	assets to a nonchantal	ble exempt or	rganization					1b(1)		<u>X</u>
(2)	Purchase	es of assets from a nor	nchantable ex	empt organization					1b(2)		X
(3)	Rental of	f facilities, equipment, o	or other asset	ts					1b(3)		X
(4)	Reimbur	sement arrangements							1b(4)		X
(5) Loans or loan guarantees											X
		ance of services or me	mbership or f	undraising solicitati	ions				1b(6)		X
		cilities, equipment, ma		-					1c		X
	-	to any of the above is	-	-		(h) should always	s show the fair m	arket		<u> </u>	
		goods, other assets, or	•	_							
		transaction or sharing									
(a) Lir	ne no	(b) Amount involved	(c) Name	e of nonchantable exemp	torganization	(a) Desc	cription of transfers, tra	insactions, and sha	ing arrangement	13	
N/A											
					_						
			<u> </u>								
											
		·						· · ·			
	-		-								
											
2a s1	the founda	ation directly or indirect	ly affiliated wi	th, or related to, or	ne or more tax-ex	empt organization	ns				
de	scribed in	section 501(c) of the C	ode (other th	nan section 501(c)(3)) or in section (527?			Ye	s X	No
		plete the following sch	· ·	` ` `	•						
		a) Name of organization	2	(b) Type of o	rganization	!	(c) Descrip	otion of relationship			
N/		-,		(4) 1)				· ·			
											
					· · · · · · · · · · · · · · · · · · ·						
											
				-							
				L				to and a data and ba	1-6-6-6-6		
İ	Under pen correct, ar	nalties of penjury, I declare the nd complete Declaration of p	at I have examine reparer (other th	ed this return, including a an taxpayer) is based o	accompanying scried n all information of wi	ules and statements, a hich preparer has any	ang to the best of my knowledge	knowledge and be	iler, it is true,		
l		<i>•</i>		,,			-	I -	RS discuss this re		
		/ /						with the pi	reparer shown bel	Yes	No
Sign	1	/ - 1/	1	_	n		_	(300 1150)			J .
	N dk	Cen Boke		-	E.	-9-12	PRES	IDENT			
Here	Signa	ature of officer or trustee			Date		Title	•			
	1.0	no proported parts		•	Preparer's signatur	•			Date	_ 1	$\overline{}$
()								24.0	Check	tf	
Paid Preparer MICHELLE SMYTHE, CPA O6/13/12 Self-employe								noyed			
Prepare	· —	ELLE SMYTHE, C		OEV c m	THE LAC		Juny Ch			040	
Use Onl	-	F 4 0 0		BEY & KUN					P00936		
	Firm's a	ddress ► 5100		• • • • • • • • • • • • • • • • • • • •	.040				73-152		
		TULSZ	A, OK	74135-657	13		_	Phone no	918-49		
									Form 99	90-PF	(2011)

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

Schedule of Contributors

OMB No 1545-0047

Name of the organization

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

2011

Employer identification number

KETCHUM CHARIT	26-2189909							
Organization type (check one))							
Filers of:	Section:							
Form 990 or 990-EZ	501(c)() (enter number) organization							
	4947(a)(1) nonexempt chantable trust not treated as a private foundation							
	527 political organization							
Form 990-PF	X 501(c)(3) exempt private foundation							
	4947(a)(1) nonexempt charitable trust treated as a private foundation							
	501(c)(3) taxable private foundation							
· ·	vered by the General Rule or a Special Rule . (8), or (10) organization can check boxes for both the General Rule and a Special Rule Se	эe						
General Rule								
	ng Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money contributor. Complete Parts I and II	or						
Special Rules								
under sections 509(a)(organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations of the regulations of the regulations of the vear, a contribution of the year, a contribution of (1) and (1) form 990-EZ, line 1.							
during the year, total co	For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III							
during the year, contrib not total to more than \$ year for an exclusively	For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, chantable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, chantable, etc., purpose. Do not complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, chantable, etc., contributions of \$5,000 or more during the year.							
990-EZ, or 990-PF), but it mus	s not covered by the General Rule and/or the Special Rules does not file Schedule B (Form t answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990 F, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ,	-EZ or on						

of 1 of Part I Schedule B (Form 990, 990-EZ, or 990-PF) (2011) Name of organization Employer identification number KETCHUM CHARITABLE FOUNDATION INC 26-2189909 Part ! Contributors (see instructions). Use duplicate copies of Part I if additional space is needed. (a) (c) (d) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution 1 KETCHUM CHARITABLE LEAD ANNUITY TR Person 5100 E SKELLY DRIVE, STE 1040 Payroll 2,600,000 Noncash TULSA OK 74135 (Complete Part II if there is a noncash contribution) (a) (b) (c) (d) Name, address, and ZIP + 4 No. **Total contributions** Type of contribution Person Payroll Noncash (Complete Part II if there is a noncash contribution) (a) (c) (d) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution Person Payroll Noncash (Complete Part II if there is a noncash contribution) (b) (a) (c) (d) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution Person Payroll \$ Noncash (Complete Part II if there is a noncash contribution) (a) (b) (c) (d) Name, address, and ZIP + 4 No. **Total contributions** Type of contribution Person **Payroll** \$ Noncash (Complete Part II if there is a noncash contribution) (a) (c) (d) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution Person Payroll

\$

(Complete Part II if there is a noncash contribution)

Noncash

KET12C01 Ketchum Charitable Foundation Inc 26-2189909 FYE: 12/31/2011		Federal Statements		6/13/2012 8:16 AM
Sta	Statement 1 - Form 990-PF	- Form 990-PF, Part I, Line 11 - Other Income	Income	•
Description		Revenue per Books	Net Investment Income	Adjusted Net Income
OTHER INCOME TOTAL		\$ -13,177	\$ -13,177 \$ -13,177	\$ -13,177 \$ -13,177
State	Statement 2 - Form 990-PF, P	-PF, Part I, Line 16b - Accounting Fees	nting Fees	
Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING FEES TOTAL	\$ 5,658	\$	0 0 0	w w
	Statement 3 - Form 990	m 990-PF, Part I, Line 18 - Taxes	axes	
Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FOREIGN TAX FEDERAL INCOME TAX EXP TOTAL	\$ 257	n		
State	Statement 4 - Form 990-PF,	- Form 990-PF, Part I, Line 23 - Other Expenses	Expenses	
Description	Total	Net Investment	Adjusted Net	Charitable Purpose
N. G. C.	w	φ.	v.	ر. د
INVESTMENT MANAGEMENT FEES TOTAL	35,690	35, 690 \$ 35, 690	\$ 35,690	0 %
				14

.

KET12C01 Ketchum Charitable Foundation Inc 26-2189909 FYE: 12/31/2011	Federal Statements	ements		6/13/2012 8:16 AM
Statement 5 - Form 9	990-PF, Part II, Line 1	Statement 5 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments	Investments	
Description INVESTMENTS TOTAL	Beginning of Year	End of Year \$ 4,261,307	Basis of Valuation	Fair Market Value \$ 4,261,307 \$ 4,261,307
Statement 6 - Form 990		-PF, Part II, Line 10c - Corporate Bond Investments	Investments	
Description INVESTMENTS TOTAL	Beginning of Year	End of Year \$ 1,570,121	Basis of Valuation	Fair Market Value \$ 1,570,121 \$ 1,570,121
Statement 7 - F	Form 990-PF, Part II,	rm 990-PF, Part II, Line 13 - Other Investments	ments	
Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
INVESTMENTS TOTAL	w w	\$ 1,561,010 \$ 1,561,010		\$ 1,561,010 \$ 1,561,010

1

KET12C01 Ketchum Charitable Foundation Inc

Federal Statements

FYE: 12/31/2011

26-2189909

6/13/2012 8:16 AM

Statement 8 - Form 990-PF, Part III, Line 5 - Other Decreases

	Description	 Amount
UNREALIZED LOSS		\$ 373,136
TOTAL		\$ 373,136

6/13/2012 8:16 AM

KET12C01 Ketchum Charitable Foundation Inc

Federal Statements

26-2189909 FYE: 12/31/2011

Statement 9 - Form 990-PF, Part VII-A, Line 10 - Substantial Contributors

Name

Address

City, State, Zip

KETCHUM CHARITABLE LEAD ANNUITY TR 5100 E SKELLY DRIVE, STE 1040

TULSA OK 74135

KET12C01 Ketchum Charitable Foundation Inc

Federal Statements

6/13/2012 8:16 AM

FYE: 12/31/2011

26-2189909

Statement 10 - Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description

LETTER FORM; AMOUNT OF FUNDS REQUESTED, PURPOSE, NAME, ADDRESS, AND CONTACT PERSON OF ORGANIZATION REQUESTING FORM

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

Description

N/A

Statement 11 - Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description

THIS FOUNDATION MAKES GRANTS TO VARIOUS UNIVERSITIES AND OTHER CHARITABLE ORGANIZATIONS. THE STUDENT GRANTS ARE BASED ON RECOMMENDATION AND APPROVAL BY THE STUDENT AID DEPARTMENT OF VARIOUS UNIVERSITIES.

Form **8868**(Rev January 2012)

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

(Rev January 20	112)		L.	cinpt Org	amzation Neturn		OMB No 1545-1709
Department of th			►r	File a separate	application for each retu	rn.	
		utomatic 3-	Month Extension, o	omplete only I	Part I and check this box		<u>▶ x</u>
					, complete only Part II (on	page 2 of this form)	· (4.1)
					itic 3-month extension on a		368.
		•				•	
Electronic fi	iling (e-file). Y	ou can elect	tronically file Form 88	368 if you need	a 3-month automatic extens	sion of time to file (6 mo	nths for
					3-month extension of time `		
					or Part II with the exception		on
					hich must be sent to the IR		
					irs gov/efile and click on e-		rofits
Part I					ubmit original (no cop		<u> </u>
A corporation	required to fil	e Form 990-	T and requesting an	automatic 6-mo	onth extension-check this b	ox and complete	
Part I only							▶ 📗
		ding 1120-C	filers), partnerships	, REMICs, and	trusts must use Form 7004	to request an extension	of time
to file income	e tax returns						
-	I			 	<u>En</u>		ımber, see instructions
Type or	Name of ex	empt organi	zation or other filer, s	see instructions		Employer id	lentification number (EIN) or
print	VETCUI	TM CLIAE	RITABLE FOU	יואיי א ריואוי	TNC	₩ ac a	10000
File by the due date for						X 26-2	
filing your		Number, street, and room or suite no. If a P O. box, see instructions Social security number (SSN) LOUISVILLE					nty number (55N)
return See instructions				For a foreign a	address, see instructions		
Wild dollors	TULSA	· poor omoo,		OK 7413			
Enter the Re		ne return tha			te application for each retur	rn)	04
Applicatio	n			Return	Application		Return
ls For				Code	Is For		Code
Form 990				01	Form 990-T (corporation)	07
Form 990-	BL			02	Form 1041-A		08
Form 990-	EZ			01	Form 4720		09
Form 990-	PF			04	Form 5227	 	10
	T (sec 401(a)		ıst)	05	Form 6069		11
Form 990-	T (trust other the	nan above)		06	Form 8870		12
Telephor If the org If this is for the whole a list with the I reque	or a Group Responding to the control of the control	8 - 4 9 2 - not have ar turn, enter th this box INs of all me c 3-month (6 , to file the return for	1425 In office or place of but the organization's four the organization's four particles are the extension of months for a corpore exempt organization	r digit Group Ex art of the group, is for. ration required t	nited States, check this box emption Number (G <u>EN)</u>	If this is and attach	•- •
	tax year begir		, and end) "

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

EFTPS (Electronic Federal Tax Payment System) See instructions

Change in accounting period

nonrefundable credits See instructions

If the tax year entered in line 1 is for less than 12 months, check reason Initial return

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

If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any

c Balance due. Subtract line 3b from line 3a Include your payment with this form, if required, by using

За

3b