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Form 990-PF Department of the Treasury Internal Revenue Service

Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0052

For cale	ndar year 2011 or tax year beginning		, and ending		
Name o	foundation			A Employer Identificatio	n number
WIL	LIAM S. KAISER FAMILY F	OUNDATION		26-3505536	5
	and street (or P O box number if mail is not delivered to stree	t address)	Room/suite	B Telephone number	
23	INVERNESS ROAD			781-848-13	163
City or 1	town, state, and ZIP code			C If exemption application is	pending, check here
WEL	LESLEY, MA 02481			·	
G Chec	k all that apply Initial return	Initial return of a fo	rmer public charity	D 1. Foreign organization	s, check here
	Final return	Amended return			
	Address change	Name change		Foreign organizations m 2. check here and attach of	eeting the 85% test, omputation
H Chec	k type of organization X Section 501(c)(3) e	xempt private foundation		 E If private foundation st	atus was terminated
	ection 4947(a)(1) nonexempt charitable trust	Other taxable private founda	tion	under section 507(b)(1	
I Fair m	arket value of all assets at end of year J Account	ing method X Cash	Accrual	F If the foundation is in a	
(from	Part II, col. (c), line 16)	ther (specify)		under section 507(b)(1	
\$	1,480,494. (Part I, coll	ımn (d) must be on cash b	asis.)	(-),	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
Part	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements
	necessanly equal the amounts in column (a))	expenses per books	income	ıncome	for chantable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received	380,013.		N/A	
2	Check If the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments				***************************************
4	Dividends and interest from securities	36,045.	36,045.		STATEMENT 1
5	Gross rents				· · · · · · · · · · · · · · · · · · ·
1	Net rental income or (loss)				
a 6a	Net gain or (loss) from sale of assets not on line 10	14,939.		<u>}</u>	**************************************
ž l	Gross sales price for all		***************************************	<u> </u>	<u> </u>
Revenue 2	Capital gain net income (from Part IV, line 2)	···!***	14,939.	[
œ 8	Net short-term capital gain		······································		
9	Income modifications	, , , , , , , , , , , , , , , , , , , ,			
10	Gross cales loss votume		······		
1	Less Cost of goods sold			***************************************	· · · · · · · · · · · · · · · · · · ·
- 1	Gross profit or (loss)		***************************************		
11	Other income	1,102.	1,102.		STATEMENT 2
12	Total. Add lines 1 through 11	432,099.	52,086.		
13	Compensation of officers, directors, trustees, etc	0.	0.		0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
₹8 168	Legal fees IV				
\ <u>e</u> <u>e</u>	Accounting fees				
Operating and Administrative Expension 25 25 25 25 25 25 25 25 25 25 25 25 25	Other professional fees C STMT 3	6,258.	6,258.		0.
9617	Interest 1 4 CUIC (S)	,	<u> </u>		
# 18	Taxes STMT 4	19,819.	0.		0.
ू ई <u>।</u> 19	Depreciation and depletion				
Ē 20.	-Oecupancy				
₩ 21	Travel, conferences, and meetings		 		
E 22	Printing and publications				
့်စ္ကို 23	Other expenses STMT 5	273.	0.		250.
ੂ ਜ਼ੋ 24	Total operating and administrative				
- Ser.	expenses. Add lines 13 through 23	26,350.	6,258.		250.
., o ₂₅	Contributions, gifts, grants paid	25,000.	- ,	<u> </u>	25,000.
26					
3	Add lines 24 and 25	51,350.	6,258.		25,250.
27			.,255.		23,233.
	Excess of revenue over expenses and disbursements	380,749.			
	Net investment income (if negative, enter -0-)		45,828.		
	Adjusted net income (if negative, enter -0-)			N/A	
123501 12-02-11	LHA For Paperwork Reduction Act Notice, see	instructions.	•••••	<u> </u>	Form 990-PF (2011)

Form **990-PF** (2011)



For	m 99	00-PF(2011) WILLIAM S. KAISER	<u>FAM</u> I	LY	FOUNDATION	26-	3505536 Page 2
p	art	Balance Sheets Attached schedules and amounts in the description	nption		Beginning of year	End o	
_	_		inly 		(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing		L	105 500		
		Savings and temporary cash investments			486,623.	259,696.	259,696.
	3	Accounts receivable	_	-			
	١.	Less allowance for doubtful accounts		- -	······································		······································
	4	Pledges receivable		_			
	_	Less allowance for doubtful accounts		-			
	1	Grants receivable		-			
	b	Receivables due from officers, directors, trustees, and other					
	_	disqualified persons					
	′	Other notes and loans receivable		\dashv			
10		Less allowance for doubtful accounts		+			
Assets		Inventories for sale or use		\vdash			
Ass		Prepaid expenses and deferred charges Investments - U S and state government obligations STI	MT 6	\vdash	0.	05 602	00 242
				-	357,764.	95,692.	98,343.
		•	8 TP	-	0.	564,358. 265,577.	610,019.
	1	Investments - land, buildings, and equipment basis	11 0	-		203,311.	203,200.
	''	Less accumulated depreciation		-	Ì	1	
	12	Investments - mortgage loans	<u> </u>	+			
	1	5 5	ит 9	H	217,238.	257,051.	249,148.
	I -	Land, buildings, and equipment basis			211/2300	23770311	247/1400
	` `	Less accumulated depreciation		-	İ	1	
	15	Other assets (describe		1			
				-′ -			
	16	Total assets (to be completed by all filers)			1,061,625.	1,442,374.	1,480,494.
	$\overline{}$	Accounts payable and accrued expenses					
	1	Grants payable					
S	19	Deferred revenue					
Ħ	20	Loans from officers, directors, trustees, and other disqualified persons					
Liabilities	21						
_	22	Other liabilities (describe) [
_	23	Total llabilities (add lines 17 through 22)			0.	0.	
		Foundations that follow SFAS 117, check here	▶ □				
Š	l	and complete lines 24 through 26 and lines 30 and 31.					
S	24	Unrestricted		\vdash			
ala	25	Temporarily restricted		\vdash			
<u> </u>	26	Permanently restricted	. 😈	-			
Ē			► X	-			
Net Assets or Fund Balances	27	and complete lines 27 through 31.			^	^	
ets	27 28	Capital stock, trust principal, or current funds Paid-in or capital surplus, or land, bldg, and equipment fund		-	0.	0.	
Ass	29	Retained earnings, accumulated income, endowment, or other		\vdash	1,061,625.	1,442,374.	
Ę.	30	Total net assets or fund balances	er iuiius	\vdash	1,061,625.	1,442,374.	
Z	00	Total file 4330to of fully balances		\vdash	1,001,025.	1,442,3/4.	
	31	Total liabilities and net assets/fund balances			1,061,625.	1,442,374.	
Ö	art		r Fund	Rai			······
_				_			
		net assets or fund balances at beginning of year - Part II, colu		ne 30)		
		it agree with end-of-year figure reported on prior year's return	1)			1	1,061,625.
		r amount from Part I, line 27a	•			2	380,749.
		r increases not included in line 2 (itemize)				3	0.
		lines 1, 2, and 3 eases not included in line 2 (itemize)	•	-	•	4	1,442,374.
		net assets or fund balances at end of year (line 4 minus line 5	5\ - Part II	colu	mn /h\ line 30	5	$\frac{0.}{1,442,374.}$
<u>~</u>	· otal	met accord or raine calables at end of year (line 4 minus line :	- rail II	, colu	mir (u), mie su	<u> b </u>	Form 990-PF (2011)
100							

2-story brick w		(s) of property sold (e common stock, 200 st			P -	low acquired - Purchase - Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
13					ļ			
b SEE ATTACHED	STATE	EMENT			-			
<u>c</u>					├		<u> </u>	
<u>d</u>					<u> </u>			
<u>e</u>	(f) Do		(*) 0		1		(h) O (loca	<u> </u>
(e) Gross sales price		preciation allowed or allowable)		st or other basis xpense of sale			(h) Gain or (loss (e) plus (f) minus	
<u>a</u>								
<u>b</u>					\dashv			
<u>c</u>	· · · · · · · · · · · · · · · · · · ·				\dashv			
d 65,895.			 	50,95	6			14,939
Complete only for assets shown	·	lumn (h) and owned by	the foundation		.0.		(I) Cours (Col. (b) sous	
Complete only for assets shown		 	1			((I) Gains (Col (h) gain (k), but not less tha	
(i) F M V as of 12/31/69		Adjusted basis s of 12/31/69		cess of col (i) col (j), if any		`	Losses (from col ((h))
			+	00, (), u				
<u>a</u>	-	<u></u>	 				·	
<u>b</u>	 							 -
<u>c</u>			 					
0								14,939
-	1	<i>C</i>			$\overline{}$			14/555
2 Capital gain net income or (net c	apıtal loss)	If gain, also enter -	er in Part I, line 0- in Part I, line	7 7)	2		14,939
Net short-term capital gain or (lo	•	d in sections 1222(5) a	and (6)		\neg			
If gain, also enter in Part I, line 8							N7 / 70	
Part V Qualification U		ction 4940(e) fo	n Daduaad	Tow on Mod	1	3	N/A	<u> </u>
f section 4940(d)(2) applies, leave to the foundation liable for the section of the foundation does not quarter the foundation does not give the foundation does not g	ction 4942 ta	x on the distributable a			nod?			X Yes N
								ZE 165 [
Enter the appropriate amount in					es			
Enter the appropriate amount in (a) Base period years Calendar year (or tax year beginn	each column		tructions before		(c)	ritable-use asse	ots (col (b) dn	(d) button ratio vided by col. (c))
(a) Base period years	each column	n for each year, see inst (b)	tructions before	making any entr	(c)	ritable-use asse	ets (col (b) do	(d) bution ratio
(a) Base period years Calendar year (or tax year beginn 2010 2009	each column	n for each year, see inst (b)	tructions before	making any entr	(c)	ritable-use asse	ets (col (b) do	(d) bution ratio
(a) Base period years Calendar year (or tax year beginn 2010 2009 2008	each column	n for each year, see inst (b)	tructions before	making any entr	(c)	ritable-use asse	ots (col (b) dn	(d) bution ratio
(a) Base period years Calendar year (or tax year beginn 2010 2009 2008 2007	each column	n for each year, see inst (b)	tructions before	making any entr	(c)	ritable-use asse	ets (col (b) dr	(d) bution ratio
(a) Base period years Calendar year (or tax year beginn 2010 2009 2008	each column	n for each year, see inst (b)	tructions before	making any entr	(c)	ritable-use asse	ets (col (b) do	(d) bution ratio
(a) Base period years Calendar year (or tax year beginn 2010 2009 2008 2007 2006	each column	n for each year, see inst (b)	tructions before	making any entr	(c)	ritable-use asse	ets (col (b) dn	(d) bution ratio
Base period years Calendar year (or tax year beginn 2010 2009 2008 2007 2006 Total of line 1, column (d)	each column	n for each year, see inst (b) Adjusted qualifying di	tructions before	Met value of no	(c) onchar		ets Distributes (col (b) dis	(d) bution ratio
Base period years Calendar year (or tax year beginn 2010 2009 2008 2007 2006 Total of line 1, column (d) Average distribution ratio for the	each columning in)	n for each year, see inst (b) Adjusted qualifying di period - divide the tota	tructions before	Met value of no	(c) onchar		ets (col (b) dn	(d) bution ratio
Base period years Calendar year (or tax year beginn 2010 2009 2008 2007 2006 Total of line 1, column (d)	each columning in)	n for each year, see inst (b) Adjusted qualifying di period - divide the tota	tructions before	Met value of no	(c) onchar		ets (col (b) dn	(d) bution ratio
Base period years Calendar year (or tax year beginn 2010 2009 2008 2007 2006 Total of line 1, column (d) Average distribution ratio for the	each columning in) 5-year base ence if less the	n for each year, see inst (b) Adjusted qualifying di period - divide the tota ian 5 years	tructions before istributions I on line 2 by 5,	Met value of no	(c) onchar		ets (col (b) dn	(d) bution ratio
Base period years Calendar year (or tax year beginn 2010 2009 2008 2007 2006 Total of line 1, column (d) Average distribution ratio for the the foundation has been in existe	each columning in) 5-year base ence if less the	n for each year, see inst (b) Adjusted qualifying di period - divide the tota ian 5 years	tructions before istributions I on line 2 by 5,	Met value of no	(c) onchar		2 3	(d) bution ratio
Base period years Calendar year (or tax year beginn 2010 2009 2008 2007 2006 Total of line 1, column (d) Average distribution ratio for the the foundation has been in existed Enter the net value of noncharita Multiply line 4 by line 3	5-year base ence if less the	n for each year, see inst (b) Adjusted qualifying di period - divide the tota ian 5 years ts for 2011 from Part X	tructions before istributions I on line 2 by 5,	Met value of no	(c) onchar		2 3 4	(d) bution ratio
Base period years Calendar year (or tax year beginn 2010 2009 2008 2007 2006 Total of line 1, column (d) Average distribution ratio for the the foundation has been in existe	5-year base ence if less the	n for each year, see inst (b) Adjusted qualifying di period - divide the tota ian 5 years ts for 2011 from Part X	tructions before istributions I on line 2 by 5,	Met value of no	(c) onchar		2 3	(d) bution ratio
Base period years Calendar year (or tax year beginn 2010 2009 2008 2007 2006 Total of line 1, column (d) Average distribution ratio for the the foundation has been in existed. Enter the net value of noncharita Multiply line 4 by line 3	5-year base ence if less the	n for each year, see inst (b) Adjusted qualifying di period - divide the tota ian 5 years ts for 2011 from Part X	tructions before istributions I on line 2 by 5,	Met value of no	(c) onchar		2 3 4	(d) bution ratio
Base period years Calendar year (or tax year beginn 2010 2009 2008 2007 2006 Total of line 1, column (d) Average distribution ratio for the the foundation has been in existe Enter the net value of noncharita Multiply line 4 by line 3 Enter 1% of net investment income	5-year base ence if less the ble-use asset	period - divide the tota ian 5 years ts for 2011 from Part X	tructions before istributions I on line 2 by 5,	Met value of no	(c) onchar		2 3 4 5 6	(d) bution ratio

123521 12-02-11

	1990-PF (2011) WILLIAM S. KAISER FAMILY FOUNDATION 26-3 PRINT VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - s	50553		Page 4
	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1			110/
	Date of ruling or determination letter (attach copy of letter if necessary-see instructions)			
	Domestic foundations that meet the section 4940(e) requirements in Part V, check here and enter 1%		9	17.
	of Part I, line 27b			
	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			0.
	Add lines 1 and 2		9	17.
	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			0.
	Tax based on investment Income. Subtract line 4 from line 3 If zero or less, enter -0-		9	17.
	Credits/Payments Credits/Payments			
	2011 estimated tax payments and 2010 overpayment credited to 2011 6a 9,920.			
	Exempt foreign organizations - tax withheld at source 6b			
	Tax paid with application for extension of time to file (Form 8868) 6c			
	Backup withholding erroneously withheld 6d			
	Total credits and payments Add lines 6a through 6d		9.9	20.
	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8			
	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10		9.0	03.
	Enter the amount of line 10 to be Credited to 2012 estimated tax 9,003. Refunded 11			0.
	ert VII-A Statements Regarding Activities			
	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in		Yes	No
	any political campaign?	1a		X
	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?	15	1	X
	If the answer is "Yes" to 1aor 1b, attach a detailed description of the activities and copies of any materials published or	\ 		1
	distributed by the foundation in connection with the activities.			
	Did the foundation file Form 1120-POL for this year?	10		X
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year		1	
	(1) On the foundation \blacktriangleright \$ O . (2) On foundation managers \blacktriangleright \$ O .			
	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation			
	managers > \$ 0.			
	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2	Ì	X
	If "Yes," attach a detailed description of the activities.			···
	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
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	 	X
	If "Yes," has it filed a tax return on Form 990-T for this year?		†	
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5	1	X
	If "Yes," attach the statement required by General Instruction T.		1	1
	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	Х	1
7	Did the foundation have at least \$5,000 in assets at any time during the year?	7	X	
	If "Yes," complete Part II, col (c), and Part XV.		1	
	Enter the states to which the foundation reports or with which it is registered (see instructions)			
	MA	— I		
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)	— I		
	of each state as required by General Instruction G? If "No," attach explanation	8b	X	
	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar		1	1
	year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV	9	ĺ	x
	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	1	X
		Form 99	0-PF	(2011)

Part VII-A Statements Regarding Activities (connected) 11	_	1990-PF(2011) WILLIAM S. KAISER FAMILY FOUNDATION 26-3	<u>35055</u> 36		Page 5
section 51/20(13)? If Yes, statch schedule (see instructions) 2	Pa	art VII-A Statements Regarding Activities (continued)			
12	11				
If Yes, attach statement (see instructions) 13					X
13 Dot the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ➤ N/A 14 The books are in care of ➤ MARY GILLIGAN Total of the Society of the	12		,2		
Webste address ▶ M/A In the books are in cars of ▶ MARY GILLIGAN Telephone no ▶ 781-848-1163 Located at ▶ 300 GRANITE STREET, SUITE 408, BRAINTREE, MA 2IP+4 ▶02184 15 Section 4947(3)(1) nonexempt charactelle trusts filling from 930-PF in lieu of Form 1041 - Check here and enter the amount of tax-exampt interest received a cacued during the year 16. At any time during calendar year 2011, dot the foundation have an interest in or a signature or other authority over a bank, securities, or or her financial account in a foreign country? See the instructions for exceptions and filing requirements for Form 10 F90-22 1 If Yes, enter the name of the foreign country. Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 19 Surging her was during the size of exchange, or fessing of property with a disqualified person? 20 Berrow money from, lend money to, or otherwise extend credit to (or accept throm) a disqualified person? 3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? 4) Yes X No 4) Pay compensation to, or pay or remburse the expenses of, a disqualified person? 4) 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, (or make any of either available for the benefit or use of a disqualified person, (or make any of either available for the person for or use of the extension to the care of the compensation to, or pay or remburse the expenses of, a disqualified person? (6) Agnee to pay money or property to a government official for a period after termination of government service, if the expenses of the acts has to quality under the exceptions described an Regulations section 544(4)(4) or an a current notice regarding disaster assistance (see instructions)? (7) Transfer any income of the care of the acts fail to quality under the exceptions described and the		,			<u>X</u>
14. The books are in care of ▶ MARY GILLIGAN Located at ▶ 300 GRANITE STREET, SUITE 408, BRAINTREE, MA 2/P+4 ▶ 02184 15. Section 4947(a)(1) nonexempt charable trusts fling form 990-PF in les of form 1041 - Check here and eleter the amount of tax-exempt interest received or accouse during the year At 15. At any time during cleandry are 2011, duit the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22 1 if Yes, eiter the name of the foreign country ▶ Part VIII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 10. 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish pods, servoices, or facilities to (or accept them from) adequalified person? (3) Transfer any income or assets to a disqualified person (or make any of orther available for the benefit or use of a disqualified person (or make any of orther available for the benefit or use of a disqualified person (or make any of orther available for the benefit or use of a disqualified person (or make any of orther available for the benefit or use of a disqualified person (or make any of orther available for the benefit or use of a disqualified person (or make any of orther available for the benefit or use of a disqualified person (or make any of orther available for the benefit or use of a disqualified person (or make any of orther available for the benefit or use of a disqualified person (or make any of orther available) for the benefit or use of a disqualified person (or make any of orther available) for years any order or a current notice regarding disaster assistan	13		13	<u> </u>	
Located at N 300 GRANTTE STREET, SUITE 408, BRAINTRE, MA IP+4 N02184 Section 4947(a(I) nonexempt chartable trusts filing form 990-PF in leu of Form 1041 - Check here and either the amount of tax-exempt interest received or accrued during the year 16. At any time during cleanedary year 2011, did the foundation have an interest in or a signature or other authority over a bank, so the instructions for exceptions and filing requirements for Form TD F 90-22 I If Yes, anter the name of the foreign country See the instructions for exceptions and filing requirements for Form TD F 90-22 I If Yes, anter the name of the foreign country Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any time is checked in the "Yes" column, unless an exception applies. 18 buring the year of the foundation (either directly or indirectly) 19 buring the year of the foundation (either directly or indirectly) 10 buring the year of the foundation (either directly or indirectly) 10 buring the year of the foundation (either directly or indirectly) 10 buring the year of the foundation (either directly or indirectly) 10 buring the year of the foundation (either directly or indirectly) 11 buring the year or received the foundation of the year sex shade created the foundation on a sustained person? Yes No 10 buring the year or pay or reimburs the expenses of, a disqualified person? Yes No 10 buring the year or pay or reimburs the expenses of, a disqualified person? Yes No 10 buring the year or pay or property to a powerment official? (Exception, Check Yio* 11 the foundation agreed to make a grant to or to employ the official for a peniod after termination of government service, if terminating within 90 days) 10 buring the year of the foundation of the acts described in 1, other than excepted acts, that were not corrected before the first day of the tax year beginning microsing disaster assistance check here 10 but the foundation of sastelly 10 bu			040 1	160	
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orm 990-PF(2011) WILLIAM S. KAISER FAM			<u>26–35055</u>	36 Page 6
Part VII-B Statements Regarding Activities for WI	nich Form 4/20 May Be i	Required (contin	ued)	
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))?	Ye	es X No	
(2) Influence the outcome of any specific public election (see section 4	1955), or to carry on, directly or indir		[32] .	
any voter registration drive?			es X No	
(3) Provide a grant to an individual for travel, study, or other similar pu		Ye	es X No	
(4) Provide a grant to an organization other than a charitable, etc., organization of the charitable of the control of the charitable of t	anization described in section		□	
509(a)(1), (2), or (3), or section 4940(d)(2)?		— —	es X No	
(5) Provide for any purpose other than religious, charitable, scientific, the prevention of cruelty to children or animals?	literary, or educational purposes, or		es X No	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qu	alify under the exceptions described	ın Regulations		
section 53 4945 or in a current notice regarding disaster assistance (se	e instructions)?		N/A	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 exer				
expenditure responsibility for the grant?		I/A 🔲 Ye	s L No	
If "Yes," attach the statement required by Regulations section by	53.4945-5(d).			
6a Did the foundation, during the year, receive any funds, directly or indire	ectly, to pay premiums on	_		
a personal benefit contract?		Ye	es X No	
b Did the foundation, during the year, pay premiums, directly or indirectly	y, on a personal benefit contract?			6b X
If "Yes" to 6b, file Form 8870.				
7a At any time during the tax year, was the foundation a party to a prohibit	ted tax shelter transaction?	Ye	es 🗓 No 📗	
b If "Yes," did the foundation receive any proceeds or have any net incom				7b
Part VIII Information About Officers, Directors,	Trustees, Foundation Ma	anagers, Highly	У	
Faid Employees, and Contractors	1 AV			
List all officers, directors, trustees, foundation managers and		(c) Compensation	(d) Contributions to	(-) Fyrana
(a) Name and address	(b) Title, and average hours per week devoted to position	(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
WILLIAM S. KAISER	TRUSTEE			
23 INVERNESS ROAD				
VELLESLEY, MA 02481	1.00	0.	0.	0.
ROWAN T. O'RILEY	TRUSTEE			
BERKSHIRE ROAD				
WELLESLEY, MA 02481	1.00	0.	0.	0.
		<u> </u>		
2 Compensation of five highest-paid employees (other than the		, enter "NONE."	(d) Contributions to	(-) Suppose
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
				L
Total number of other employees paid over \$50,000			>	0
			Form 9	990-PF (2011)

Form 990-PF (2011) WILLIAM S. KAISER FAMILY FOUNDA	TION 26-	-3505536 Page 7
Part VIII Information About Officers, Directors, Trustees, Found Paid Employees, and Contractors (continued)	ation Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, ent	er "NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
		
	-	
Total number of others receiving over \$50,000 for professional services		▶ 0
Part IX-A Summary of Direct Charitable Activities		-
List the foundation's four largest direct charitable activities during the tax year. Include relevant stat number of organizations and other beneficiaries served, conferences convened, research papers pr	istical information such as the oduced, etc	Expenses
1 N/A		
2		
2		
3		-
4		
		<u></u>
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year of N/A	in lines 1 and 2	Amount
1N/A		-
		-
2		
<u> </u>		1
		1
All other program-related investments. See instructions		
3		_
		_
		I

Total. Add lines 1 through 3

Form **990-PF** (2011)

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndation	s, see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
а		1a	1,165,068.
b	Average of monthly cash balances	1b	<u> </u>
	Fair market value of all other assets	10	
d	Total (add lines 1a, b, and c)	1d	1,165,068.
e	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0 .		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,165,068.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	17,476.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	1,147,592.
6	Minimum investment return. Enter 5% of line 5	6	57,380.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here and do not complete this part.)	id certai	n
1	Minimum investment return from Part X, line 6	1	57,380.
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)		
C	Add lines 2a and 2b	2c	917.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	56,463.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	56,463.
6	Deduction from distributable amount (see instructions)	6	0.
<u>7</u>	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	56,463.
	art XII Qualifying Distributions (see instructions)	1	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		25 250
a	(2),	1a	25,250.
	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a _		3a	
b	the second secon	3b	25,250.
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	25,230.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		^
c	Income Enter 1% of Part I, line 27b	5	25,250.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation 4940(e) reduction of tax in those years	qualities	TOT LITE SECTION

Form **990-PF** (2011)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI,				· · · · · · · · · · · · · · · · · · ·
line 7				<u>56,463.</u>
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			21,792.	
b Total for prior years		0		
3 Excess distributions carryover, if any, to 2011	******	0.		
a From 2006				
b From 2007				
¢ From 2008				
d From 2009				
e From 2010				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2011 from		***************************************		·····
Part XII, line 4 ►\$ 25,250.				
a Applied to 2010, but not more than line 2a			21,792.	
b Applied to undistributed income of prior		<u> </u>		· · · · · · · · · · · · · · · · · · ·
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus			••••••••••••••••••••••••••••••••••••••	
(Election required - see instructions)	0.			
d Applied to 2011 distributable amount		.''''		3,458.
e Remaining amount distributed out of corpus	0.			······································
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract				······
line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable				
amount - see instructions		0.		
e Undistributed income for 2010 Subtract line				······
4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2011 Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2012				53,005.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2006	_			
not applied on line 5 or line 7	0.	***************************************		
9 Excess distributions carryover to 2012.				
Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2007				
b Excess from 2008				
c Excess from 2009				
d Excess from 2010				
e Excess from 2011				5 000 DE (00 (1)

Form 990-PF (2011)

Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment Recipient If recipient is an individual, Purpose of grant or contribution Foundation show any relationship to Amount status of any foundation manager Name and address (home or business) recipient or substantial contributor a Paid during the year HORIZON FOR HOMELESS CHILDREN NONE SUPPORT N/A 1705 COLUMBUS AVENUE ROXBURY, MA 02119 10,000. MILTON ACADEMY NONE N/A SUPPORT 170 CENTRE STREET MILTON, MA 02186 10,000. DANA FARBER CANCER INSTITUTE NONE SUPPORT N/A 450 BROOKLINE AVENUE BOSTON, MA 02215 5,000. **▶** 3a Total 25,000. b Approved for future payment NONE **▶** 3b 0. Total

Part XVI-A Analysis of Income-Prod	lucing Activities
------------------------------------	-------------------

Enter gross amounts unless otherwise indicated	Unrelated	business income		ded by section 512, 513, or 514	(B)
•	(a)	(b)	(C) Exclu-	(d)	Related or exempt
1 Program service revenue	Business code	Amount	sion	Amount	function income
a			† · · · ·		
b					
C			1	-	
d			1		
8					
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	36,045.	
5 Net rental income or (loss) from real estate			1		
a Debt-financed property					***************************************
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			14	1,102.	
8 Gain or (loss) from sales of assets other					
than inventory			18	14,939.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a					
b	_				
C	_	·			
d	_				
e			1		
12 Subtotal Add columns (b), (d), and (e)		0		52,086.	
13 Total. Add line 12, columns (b), (d), and (e)				13	52,086.
(See worksheet in line 13 instructions to verify calculations)					

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

7	the foundation's exempt purposes (other than by providing funds for such purposes)
+-	
11	

Form 990-PF (2		AM S. KAI	SER FA	MILY FOUNDA	ATION	26-35	<u>05536</u>	Pa	ge 1 3
Part XVII	Information Ro Exempt Organ		sfers To a	and Transaction	s and Relation	onships With Nonch	naritable	•	
1 Did the ord	ganization directly or indi		of the following	g with any other organiz	ation described in	section 501(c) of		Yes	No
	other than section 501(c			-		(0)			
a Transfers	from the reporting found	lation to a noncharita	ble exempt org	janization of	•				
(1) Cash							1a(1)		X
(2) Other	assets						1a(2)		X
b Other trans									
	of assets to a noncharita						1b(1)		<u> X</u>
	ases of assets from a no		organization				1b(2)		X
• •	of facilities, equipment,						1b(3)		X
	oursement arrangements	3					1b(4)		X
	or loan guarantees						1b(5)		X
	rmance of services or me						1b(6)		X
-	facilities, equipment, ma	•			I always show the	fair market value of the good	1c	L	
						iction or sharing arrangemen		ocis,	
) the value of the goods,			or 1000 than tan market	value in any transc	ionon or onaring arrangemen	t, 011044 111		
	(b) Amount involved	·, · · · · · · · · · · · · · · · · · ·		exempt organization	(d) Desc	ription of transfers, transactions, a	ind sharing ar	rangeme	ents
			N/A						
		ļ							
		<u> </u>							
		 			<u> </u>				
- +	 	 					-		
				•					
									
									-
		<u> </u>							
	idation directly or indirec				janizations describ	ped			_
	501(c) of the Code (othe)(3)) or in sect	ion 527?			Yes	X	∐ No
b it Yes, co	mplete the following sch (a) Name of org			(h) Type of ergenization	\n_	(e) Description of relation			
	N/A	gamzation		(b) Type of organization	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	(c) Description of relation	пэшр		
	217,22								
									
								-	
Under	penalties of penjury, I declare	that I have examined the	ıs retum, ıncludin	g accompanying schedules	and statements, and	to the best of my knowledge	May the IRS	discuss	this
Sign L	elief, it is true, correct, and co	Postaration of pr	eparer (other than	taxpayer) is based on all in		eparer has any knowledge	return with th shown below	e prepar	rer
Here	- William	. Jan	ur_			STEE	X Yes		No
Sign	ature of officer or trustee	-	15 .	Date	Title	L 051			
	Print/Type preparer's n	arne	Preparer's si	gnature	Date	Check if PTI	IV		
Paid	SONIA STIN	ICO	CONTA	COTNO	05/10/	self- employed	00110	562	
Paid Preparer	Firm's name LIV		SONIA	S, P.C.	05/10/	Firm's EIN ► 04 -	$\frac{00110}{25361}$		
Use Only	rum s name P 11 V	TIGOTON 0	HAINE	D, F.C.		FIRM'S EIN P 04-	2J30I	, 3	
Jinj	Firm's address ► 40	GROVE ST	REET						

Form **990-PF** (2011)

(781)237-3339

WELLESLEY, MA 02482-7711

Phone no

Schedule B (Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Name of the organization

Schedule of Contributors

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

OMB No 1545-0047

2011

Employer identification number

\$

WILLIAM S. KAISER FAMILY FOUNDATION 26-3505536 Organization type (check one): Filers of: Section: Form 990 or 990-EZ 501(c)() (enter number) organization 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization Form 990-PF X 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule. Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions. **General Rule** For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. **Special Rules** For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II. For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, 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. For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not 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, charitable, etc., purpose. Do not complete any of the parts unless the General Rule applies to this organization because it received nonexclusively

but it must answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on Part I, line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF),

religious, charitable, etc., contributions of \$5,000 or more during the year.

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2011)

Name of organization

Employer identification number

WILLIAM S. KAISER FAMILY FOUNDATION

26-3505536

Part I	Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.					
(a)	(b)	(c)				
No.	Name, address, and ZIP + 4	Total contributions				

No.	Name, address, and ZIP + 4	lotal contributions	Type of contribution
1	WILLIAM S. KAISER 23 INVERNESS ROAD WELLESLEY, MA 02481	\$180,013.	Person Payroll Noncash X (Complete Part II if there is a noncash contribution.)
(a)	(b)	(c)	(d)
No.	Name, address, and ZIP + 4	Total contributions	Type of contribution
2	WILLIAM S. KAISER		Person X
!	23 INVERNESS ROAD	\$\$	Payroll Noncash Complete Part II of these
_	WELLESLEY, MA 02481		(Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroli Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)

Name of organization

Employer identification number

WILLIAM S. KAISER FAMILY FOUNDATION

26-3505536

Part II Noncash Property (see instructions). Use duplicate copies of Part II if ac
--

No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	5 SHARES OF SUCCESS FACTORS		
		\$\$	12/28/11
(a) No. from Part i	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received

ame or orgai	nization		Employer Identification number
VILLIAN Part III	M. S. KAISER FAMILY FOUN	IDATION dual contributions to section 501(c	26-3505536
F*************************************	year. Complete columns (a) through (e) and the total of exclusively religious, charitable, etc	e following line entry: For organization)(7), (8), or (10) organizations that total more than \$1,000 for the one completing Part III, enter the year (Figer this information open) \$
	Use duplicate copies of Part III if additional		(cital distributions)
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-		(e) Transfer of gif	t
-	Transferee's name, address, an	d ZIP + 4	Relationship of transferor to transferee
(a) No.	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
Part I	(u) Fulpose of gift	(c) Ose of grit	(a) Description of now girt is need
		(e) Transfer of gif	it
-	Transferee's name, address, an	d ZIP + 4	Relationship of transferor to transferee
(a) No. from Part i	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
		(e) Transfer of gif	it .
-	Transferee's name, address, an	d ZIP + 4	Relationship of transferor to transferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
[-			
	Transferee's name, address, an	(e) Transfer of git	Relationship of transferor to transferee
-			

Part IV Capital Gains and Los	ses for Tax on Investment Income				
	describe the kind(s) of property solick warehouse, or common stock, 20		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a BAYTEX ENERGY (CORP			08/27/08	05/10/11
b PG&E CORP			P	03/08/10	04/04/11
c VENTAS INC			P	02/26/04	05/10/11
d WESTPAC BANKING	ADR		P	01/31/06	
₆ FNMA POOL # 725	5690		P	VARIOUS	VARIOUS
	5580		P	VARIOUS	VARIOUS
g FNMA POOL # 889			P	VARIOUS	VARIOUS
h FNMA POOL # 890)314		P	VARIOUS	VARIOUS
NALCO			P	11/04/11	07/11/11
<u>k</u>					
1					
<u>n</u>					
0				L.,.,,,,,	
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		Gain or (loss) lus (f) minus (g)	
a 6,319.		3,192.			3,127.
b 11,295.		10,896.			399.
c 15,314.		7,462.			7,852.
d 13,528.		9,386.			4,142.
e 6,571.		6,703.			-132.
<u>1</u> 3,136.		3,355.			-219.
g 2,294.		2,467.			-173.
h 1,844.		2,009.			-165.
5,594.		5,486.			108.
1					
k					
1					
<u>m</u>					
n					
Complete only for seests above	a gate to column (h) and award hy	the foundation on 10/01/60			
(i) F M V as of 12/31/69	g gain in column (h) and owned by (j) Adjusted basis as of 12/31/69	(k) Excess of col (I)	Gains (excess	sses (from col. (h)) of col. (h) gain ove ot less than "-0-")	
	25 01 12/51/09	over col (j), if any	·		2 127
a .					3,127. 399.
<u>b</u>					7,852.
<u>c</u>					4,142.
d					-132.
e f		-			-219.
					-213.
<u>g</u>					-165 .
			 		108.
1			··		100.
<u></u>	 _				
k 1	······································				
m		 - - 			-
n		 			
0					
2 Capital gain net income or (net ca	pital loss) { If gain, also enter "-(r in Part I, line 7 0-" in Part I, line 7	2		14,939.
3 Net short-term capital gain or (los		nd (6)			
If gain, also enter in Part I, line 8, If (loss), enter "-0-" in Part I, line 8		}	3	N/A	

FORM 990-PF DIVIDEN	DS AND	INTER	EST FROM	SEC	URITIES	STATEMENT	1
SOURCE		GROSS	AMOUNT		PITAL GAINS DIVIDENDS	COLUMN (A	7)
DIVIDEND AND INTEREST INCOME	•		36,045.		0.	36,0	45.
TOTAL TO FM 990-PF, PART I,	LN 4		36,045.	====	0.	36,0	45.
FORM 990-PF	O'	THER I	NCOME			STATEMENT	2
DESCRIPTION			(A) REVENUE PER BOOK		(B) NET INVEST- MENT INCOME		
CLASS ACTION LITIGATION			1,	102.	1,102	•	
TOTAL TO FORM 990-PF, PART I	, LINE	11 _	1,	102.	1,102	•	
FORM 990-PF	OTHER :	PROFES	SIONAL F	EES		STATEMENT	3
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INV MENT IN	EST-	(C) ADJUSTED NET INCOM		
INVESTMENT MANAGEMENT FEES -MERRILL LYNCH CUSTODY FEES - STATE		5,332.	5	,332	-		0.
STREET BANK INVESTMENT MANGEMENT FEE -		117.		117	•		0.
GANNETT, WELSH & KOTLER		809.		809	•		0.
TO FORM 990-PF, PG 1, LN 16C		6,258.	6	,258	•		0.

FORM 990-PF	TAXES			STATEMENT 4		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVE MENT INC		(C) ADJUSTED NET INCOM		
FEDERAL EXCISE TAXES	19,819.		0.			0.
TO FORM 990-PF, PG 1, LN 18	19,819.		0.			0.
FORM 990-PF	OTHER E	XPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVE MENT INC		(C) ADJUSTED NET INCOM		
BANK FEE STATE FILING FEES	23. 250.		0.			0. 50.
TO FORM 990-PF, PG 1, LN 23	273.		0.			50.
FORM 990-PF U.S. AND S	STATE/CITY G	OVERNMENT	OBL	GATIONS	STATEMENT	6
DESCRIPTION	U.S GOV'		вос	OK VALUE	FAIR MARKE VALUE	Т
US GOVERNMENT MUNICIPAL OBLIGATIONS	X			68,025. 27,667.	69,3 29,0	
TOTAL U.S. GOVERNMENT OBLIGAT	rions	•		68,025.	69,3	32.
TOTAL STATE AND MUNICIPAL GOV	VERNMENT OBL	IGATIONS		27,667.	29,0	11.
TOTAL TO FORM 990-PF, PART I	I, LINE 10A	•		95,692.	98,3	43.

FORM 990-PF	CORPORATE STOCK	STATEMENT 7
DESCRIPTION	BOOK VA	FAIR MARKET LUE VALUE
ANNALY CAP MGMT	25	23,541.
AT&T INC		1,015. 15,816.
AMN ELEC POWER		744. 9,006.
BAYTEX ENERGY TR		,561. 12,408.
BAYTEX ENERGY TR		7,992.
BRISTOL MEYERS SQUIB		,639. 9,515.
CHIMERA INVESTMENT		,965. 6,463.
ENTERTAINMENT PPTYS TR		5,332. 18,708.
GENUINE PARTS		,951. 13,648.
INTEGRYS ENERGY GROUP		5,469. 27,090.
ROYAL DUTCH SHELL		7,706. 16,811.
VORNADO REALTY TRUST		3,674. 13,835.
VORNADO REALTY TRUST	13	96. 154.
VENTAS INC	7	7,595. 15,712.
VODAFONE GROP PLC		7,220. 11,632.
WESTPAC BANKING		174. 12,800.
TORTOISE ENERGY INFR. CORP.		28,393.
KAYNE ANDERSON MLP		20,333.
ASTRAZENECA PLC		5,582. 5,786.
ASTRAZENECA PLC		5,306. 4,860.
BCE INC		2,444. 14,584.
BRISTOL MEYERS SQUIB		14,304. 1,480. 5,991.
CHIMERA INVESTMENT		2,894.
CHIMERA INVESTMENT		,310. 808.
DIGITAL RLTY TR		13,334.
PHILIP MORRIS INTL		2,424. 16,088.
PFIZER INC		13,633.
SOUTHERN COPPER CORP		7,903. 13,033. 10,412.
STARWOOD PPTY TR		7,297. 6,941.
STARWOOD PPTY TR		2,818. 2,536.
STARWOOD PPTY TR		,939. 1,721.
SEADRILL LTD		1,721.
ALLIANT ENERGY CORP		5,180. 11,201. 6,616.
BANK OF NOVA SCOTIA		5,290. 5,230.
CONOCOPHILLIPS		5,230. 5,339. 6,194.
KRAFT FOODS		5,375. 6,725.
KIMBERLY CLARK		5,373. 0,723. 5,359. 6,988.
REPSOL YPF S A SPND ADR		·
TEEKAY OFFSHORE PARTNERS		5,276. 6,102. 5,323. 5,586.
SUCCESSFACTORS INC),013. 180,013.
TELEFONICA SA SPAIN ADR		3,376. 160,013. 8,939.
		· · · · · · · · · · · · · · · · · · ·
TOTAL TO FORM 990-PF, PART II, L	INE 10B 564	610,019.

FORM 990-PF	CORPORATE BONDS		STATEMENT 8
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
CROWN CASTLE		F 470	5,419.
CASE CORP		5,478. 5,410	
TEREX CORP		5,410.	5,363.
CONSTELLATION BRANDS		5,738.	5,525.
DOMTAR CORP		5,469.	5,494.
BANK OF AMERICA CORP		6,400.	6,300.
COMSTOCK RES INC		5,493.	4,883.
WINDSTREAM CORP		5,275.	4,838.
MOTOROLA INC		5,325.	5,413.
JP MORGAN CHASE		5,766.	5,604.
AMERICAN TOWER CORP		5,638.	5,578.
AUTONATION		4,993.	5,086.
GEN ELEC CAP CORP		5,263.	5,250.
AMKOR TECHNOLOGIES		5,531.	5,600.
XEROX CORP		5,125.	5,113.
BE AEROSPACE INC		5,804.	5,632.
CSC HOLDINGS INC		5,400.	5,475.
CRH AMERICA INC		5,462.	5,500.
VALERO ENERGY CORP		6,055.	5,705.
CITIZENS COMMS		6,552.	6,412.
PENN VIRGINIA CORP		5,125.	4,875.
TESORO CORP		4,975.	4,650.
NRG ENERGY		5,694.	5,613.
SCIENTIFIC GAMES INTITL		5,125.	5,075.
CINEMARK USA		5,375.	5,300.
PIONEER NATURAL RES		5,525.	5,438.
DENBURY RES INC		5,675. 5,474.	5,864. 5,588.
LEAR CORP		•	5,500.
DIRECT TV HOLDINGS LLC		5,437. 5,346.	5,389.
AK STEEL CORP			4,700.
AES CORP		5,094. 5,300.	5,500.
GOODYEAR TIRE		5,350.	5,450.
POLYONE CORP		5,325.	5,163.
ARCH COAL INC		5,206.	5,103.
ENERGY TRANSFER		5,423.	5,462.
METROPCS WIRELESS		· · · · · · · · · · · · · · · · · · ·	
JABIL CIRCUIT		5,025.	4,662.
HANES BRANDS INC		4,900.	5,087.
CHESAPEAKE ENERGY CO		5,087. 5,044	5,075.
INTL PAPER CO		5,044. 5,952.	5,137.
IRON MOUNTAIN		5,269.	6,172.
GEORGIA PAC CORP		6,012.	5,325. 6,410.
LIBERTY MEDIA CORP			
FORD MOTOR CO		4,850. 5,650.	4,806. 6,000.
GOLDMAN SACHS GRP			
COMCAST CORP		5,085.	4,845.
US STEEL CORP		5,862. 4,500.	6,319. 3,900.
of diffill cont		4,500.	3,300.

WILLIAM S. KAISER FAMILY FOUNDATION			26-3505536 4,906. 5,775. 263,288.
CENTURYTEL INC EL PASO CORP MTN TOTAL TO FORM 990-PF, PART II, LINE 10C		4,841. 5,874.	
		265,577.	
FORM 990-PF OTH	HER INVESTMENTS		STATEMENT
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
DODGE & COX INTERNATIONAL	COST	53,866.	51,286
OBERWEIS EMERGING GROWTH FUND	COST	41,712.	27,050
STRATTON SMALL CAP VALUE FUND	COST	59,868.	75,198
THIRD AVENUE INTERNATIONAL VALUE	COST	26,640.	19,652
VANGUARD GNMA	COST	38,571.	40,912
ARCELORMITTAL	COST	6,442.	5,561
RIO TINTO FIN USA LTD ROYAL CARIBBEAN	COST COST	6,705.	6,824
TECK COMINCO LTD	COST	6,211. 5,271.	5,900 5,486
TEEKAY CORP	COST	5,213.	4,813
WEATHERFORD INTL LTD	COST	6,552.	6,466
TOTAL TO FORM 990-PF, PART II, LIN	NE 13	257,051.	249,148

LIST OF FOUNDATION MANAGERS

NAME OF MANAGER

WILLIAM S. KAISER ROWAN T. O'RILEY