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Form 990-PF

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

OMB No 1545-0052

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

For calendar year 2011, or tax year beginning 01-01-2011, and ending 12-31-2011

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

Name of foundation: KUTSCHE CHARITABLE TRUST; A Employer identification number: 38-6610379; B Telephone number: (800) 400-0439; H Check type of organization: Section 501(c)(3) exempt private foundation; I Fair market value of all assets at end of year: \$ 2,206,907

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12), Operating and Administrative Expenses (13-26), and Summary (27-29).

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

Part II Balance Sheets		Beginning of year			End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing		1,625		2,365		2,365
	2 Savings and temporary cash investments		78,721		26,904		26,904
	3 Accounts receivable <input type="checkbox"/> _____ Less allowance for doubtful accounts <input type="checkbox"/> _____				0		0
	4 Pledges receivable <input type="checkbox"/> _____ Less allowance for doubtful accounts <input type="checkbox"/> _____						
	5 Grants receivable						
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)						
	7 Other notes and loans receivable (attach schedule) <input type="checkbox"/> _____ Less allowance for doubtful accounts <input type="checkbox"/> _____ 0						
	8 Inventories for sale or use						
	9 Prepaid expenses and deferred charges						
	10a Investments—U S and state government obligations (attach schedule)						
	b Investments—corporate stock (attach schedule)						
	c Investments—corporate bonds (attach schedule)						
	11 Investments—land, buildings, and equipment basis <input type="checkbox"/> _____ Less accumulated depreciation (attach schedule) <input type="checkbox"/> _____						
	12 Investments—mortgage loans						
	13 Investments—other (attach schedule)		2,061,961	<input checked="" type="checkbox"/>	2,101,455		2,177,638
	14 Land, buildings, and equipment basis <input type="checkbox"/> _____ Less accumulated depreciation (attach schedule) <input type="checkbox"/> _____						
15 Other assets (describe <input type="checkbox"/> _____)		<input checked="" type="checkbox"/> 7,022	<input checked="" type="checkbox"/>	1,812			
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)		2,149,329		2,132,536		2,206,907	
Liabilities	17 Accounts payable and accrued expenses						
	18 Grants payable						
	19 Deferred revenue						
	20 Loans from officers, directors, trustees, and other disqualified persons						
	21 Mortgages and other notes payable (attach schedule)						
	22 Other liabilities (describe <input type="checkbox"/> _____)						
23 Total liabilities (add lines 17 through 22)				0			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.						
	24 Unrestricted						
	25 Temporarily restricted						
	26 Permanently restricted						
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31.						
	27 Capital stock, trust principal, or current funds		2,139,241		2,112,462		
	28 Paid-in or capital surplus, or land, bldg, and equipment fund						
29 Retained earnings, accumulated income, endowment, or other funds		10,088		20,074			
30 Total net assets or fund balances (see page 17 of the instructions)		2,149,329		2,132,536			
31 Total liabilities and net assets/fund balances (see page 17 of the instructions)		2,149,329		2,132,536			

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	2,149,329
2	Enter amount from Part I, line 27a	2	-16,793
3	Other increases not included in line 2 (itemize) <input type="checkbox"/> _____	3	0
4	Add lines 1, 2, and 3	4	2,132,536
5	Decreases not included in line 2 (itemize) <input type="checkbox"/> _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,132,536

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	61,698
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2010	112,702	2,242,951	0.050247
2009	93,576	1,981,324	0.047229
2008	98,094	2,336,541	0.041983
2007	141,537	2,765,136	0.051186
2006	135,899	2,643,843	0.051402

2 Total of line 1, column (d).	2	0.242047
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.048409
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5.	4	2,339,658
5 Multiply line 4 by line 3.	5	113,261
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	1,040
7 Add lines 5 and 6.	7	114,301
8 Enter qualifying distributions from Part XII, line 4.	8	119,910

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	1,040
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	0
3	Add lines 1 and 2.	3	1,040
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	5	1,040
6	Credits/Payments		
a	2011 estimated tax payments and 2010 overpayment credited to 2011	6a	1,116
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments Add lines 6a through 6d.	7	1,116
8	Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	76
11	Enter the amount of line 10 to be Credited to 2012 estimated tax ▶ 76 Refunded ▶	11	0

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		No
c Did the foundation file Form 1120-POL for this year?		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		No
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ MI _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation .</i>	Yes	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV on page 27)? <i>If "Yes," complete Part XIV</i>		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No	
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No	
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ _____	13	Yes		
14	The books are in care of ▶ <u>FIFTH THIRD BANK</u> Telephone no ▶ <u>(616) 653-5417</u> Located at ▶ <u>111 LYON STREET NW GRAND RAPIDS MI</u> ZIP+4 ▶ <u>49503</u>				
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶ <table border="1" style="display: inline-table;"><tr><td style="width: 50px; text-align: center;">15</td></tr></table>	15			
15					
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?		Yes	No	
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ▶ _____	16		No	

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No 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 all years listed, answer "No" and attach statement—see page 20 of the instructions).	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
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 Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.</i>)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?	4b		No

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

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

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Fifth Third Bank 111 Lyon Street NW Grand Rapids, MI 49501	Trustee 1	0		

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

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

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

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services. **0**

Part IX-A Summary of Direct Charitable Activities

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

Part IX-B Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
3 All other program-related investments. See page 24 of the instructions	

Total. Add lines 1 through 3.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	2,375,287
b	Average of monthly cash balances.	1b	0
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,375,287
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	2,375,287
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	35,629
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,339,658
6	Minimum investment return. Enter 5% of line 5.	6	116,983

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

1	Minimum investment return from Part X, line 6.	1	116,983
2a	Tax on investment income for 2011 from Part VI, line 5.	2a	1,040
b	Income tax for 2011 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,040
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	115,943
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	115,943
6	Deduction from distributable amount (see page 25 of the instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	115,943

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	119,910
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	119,910
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	1,040
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	118,870

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

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

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				115,943
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only.			0	
b Total for prior years 2009, 20__, 20__		0		
3 Excess distributions carryover, if any, to 2011				
a From 2006.				0
b From 2007.				1,635
c From 2008.				0
d From 2009.				0
e From 2010.				2,782
f Total of lines 3a through e.	4,417			
4 Qualifying distributions for 2011 from Part XII, line 4 ▶ \$ <u>119,910</u>				
a Applied to 2010, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions).	0			
d Applied to 2011 distributable amount.				115,943
e Remaining amount distributed out of corpus	3,967			
5 Excess distributions carryover applied to 2011 <i>(If an amount appears in column (d), the same amount must be shown in column (a).)</i>	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	8,384			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions		0		
e Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions).	0			
8 Excess distributions carryover from 2006 not applied on line 5 or line 7 (see page 27 of the instructions).	0			
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	8,384			
10 Analysis of line 9				
a Excess from 2007.				1,635
b Excess from 2008.				0
c Excess from 2009.				0
d Excess from 2010.				2,782
e Excess from 2011.				3,967

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2011, enter the date of the ruling.

b Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2011	(b) 2010	(c) 2009	(d) 2008	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

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

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

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

c Any submission deadlines

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

Part XV **Supplementary Information** (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> MARY FREE BED HOS & REHAB CTR ATTN RANDALL L DENEFF 235 WEALTHY ST SE GRAND RAPIDS, MI 49503	NONE	509 A (1)	RESEARCH & DIAGNOSTIC EQUIPMENT	39,825
ST MARY'S HEALTH SERVICES MICHELLE RABIDEAU DIRECT 200 JEFFERSON SE GRAND RAPIDS, MI 49503	NONE	509 A (1)	RESEARCH & DIAGNOSTIC EQUIPMENT	39,825
SPECTRUM HEALTH FOUNDATION ATTN LARRY B JONGEKRIK 100 MICHIGAN ST NE GRAND RAPIDS, MI 49503	NONE	509 A (1)	RESEARCH AND DIAGNOSTIC EQUIPMENT	39,825
Total			▶ 3a	119,475
b <i>Approved for future payment</i>				
Total			▶ 3b	

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code... 1a(1) Cash... 1a(2) Other assets... 1b(1) Sales of assets... 1b(2) Purchases of assets... 1b(3) Rental of facilities... 1b(4) Reimbursement arrangements... 1b(5) Loans or loan guarantees... 1b(6) Performance of services... 1c Sharing of facilities... 1d If the answer to any of the above is "Yes," complete the following schedule.

Table with 4 columns: (a) Line No, (b) Amount involved, (c) Name of noncharitable exempt organization, (d) Description of transfers, transactions, and sharing arrangements.

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code... [] Yes [x] No

b If "Yes," complete the following schedule. Table with 3 columns: (a) Name of organization, (b) Type of organization, (c) Description of relationship.

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge. Signature of officer or trustee, Date, Title, Preparer's Signature, Date, Firm's name, Firm's address, Firm's EIN, Phone no, PTIN, Check if self-employed.

May the IRS discuss this return with the preparer shown above? See instructions [] Yes [x] No

Additional Data

Software ID:

Software Version:

EIN: 38-6610379

Name: KUTSCHE CHARITABLE TRUST

Form 990PF - Special Condition Description:

Special Condition Description

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
3808 209 PIMCO ALL ASSET FUND		2008-06-25	2011-03-03
1047 PIMCO ALL ASSET FUND		2010-12-27	2011-03-03
925 PIMCO ALL ASSET FUND		2010-04-15	2011-03-03
3560 PIMCO ALL ASSET FUND		2010-06-29	2011-03-03
137 T ROWE PRICE NEW ERA FUND INC COM		2010-12-27	2011-03-03
458 T ROWE PRICE NEW ERA FUND INC COM		2010-11-24	2011-03-03
271 VANGUARD REIT ETF		2010-12-27	2011-03-03
234 VANGUARD REIT ETF		2010-11-24	2011-03-03
395 VANGUARD REIT ETF		2009-06-09	2011-03-03
4164 595 BLACKROCK GLOBAL ALLOCATION-A		2011-03-03	2011-05-24
195 FIDELTIY ADV SMALL CAP FD-I		2010-12-27	2011-05-24
115 FIDELTIY ADV SMALL CAP FD-I		2009-06-09	2011-05-24
480 ISHARES TR MSCI EMERGING MKTS INDEX FD ETF [RIC]		2005-10-04	2011-05-24
55 ISHARES S&P MIDCAP 400 GROWTH ETF		2008-12-17	2011-05-24
30 ISHARES S&P MIDCAP 400 VALUE ETF		2010-04-15	2011-05-24
40 ISHARES S&P MIDCAP 400 VALUE ETF		2008-12-17	2011-05-24
637 OPPENHEIMER DVLPING MKTS-Y		2010-12-27	2011-05-24
740 T ROWE PRICE NEW ERA FUND INC COM		2010-11-24	2011-05-24
580 ROYCE FD TOTAL RETURN FD		2010-12-27	2011-05-24
75 VANGUARD REIT ETF		2009-06-09	2011-05-24
1385 T ROWE PRICE NEW ERA FUND INC COM		2010-11-24	2011-07-11
3900 846 DODGE & COX INCOME FD COM		2010-11-24	2011-08-30
590 559 FIDELTIY ADV SMALL CAP FD-I		2009-06-09	2011-08-30
336 046 FIDELITY ADV NEW INSIGHTS-I		2011-05-24	2011-08-30
302 94 FIRST EAGLE GOLD FUND-A		2011-07-11	2011-08-30
10 ISHARES BARCLAYS TIPS BOND FUND		2011-03-03	2011-08-30
12 ISHARES S&P MIDCAP 400 GROWTH ETF		2008-12-17	2011-08-30
2170 373 MERGER FD SH BEN INT		2011-05-24	2011-08-30
3173 PIMCO ALL ASSET ALL AUTH FUND		2011-05-24	2011-08-30
234 154 PIMCO ALL ASSET ALL AUTH FUND		2011-03-03	2011-08-30

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
5172 099 PIMCO TOTAL RETURN FUND		2008-06-25	2011-08-30
1397 292 ROYCE FD PREMIER		2010-04-15	2011-08-30
1228 683 ROYCE FD TOTAL RETURN FD		2010-12-27	2011-08-30
141 VANGUARD DIVIDEND APPRECIATION ETF [RIC]		2011-05-24	2011-08-30
460 DODGE & COX INTL STOCK FUND		2010-12-27	2011-12-20
190 DODGE & COX INTL STOCK FUND		2010-11-24	2011-12-20
115 835 DODGE & COX INTL STOCK FUND		2011-08-30	2011-12-20
900 DODGE & COX INTL STOCK FUND		2009-12-22	2011-12-20
2196 DODGE & COX INTL STOCK FUND		2008-12-17	2011-12-20
503 DODGE & COX INTL STOCK FUND		2009-04-21	2011-12-20
8 576 DODGE & COX INTL STOCK FUND		2008-12-23	2011-12-20
217 553 DODGE & COX INTL STOCK FUND		2008-12-23	2011-12-20
2979 DODGE & COX INCOME FD COM		2010-11-24	2011-12-20
103 954 FIDELITY ADV NEW INSIGHTS-I		2011-05-24	2011-12-20
975 046 FIDELITY ADV NEW INSIGHTS-I		2010-12-27	2011-12-20
133 ISHARES TR MSCI EMERGING MKTS INDEX FD ETF [RIC]		2011-08-30	2011-12-20
41 ISHARES S&P MIDCAP 400 GROWTH ETF		2008-12-17	2011-12-20
67 ISHARES S&P MIDCAP 400 VALUE ETF		2008-12-17	2011-12-20
180 OPPENHEIMER DVLPING MKTS-Y		2010-12-27	2011-12-20
3471 PIMCO TOTAL RETURN FUND		2008-06-25	2011-12-20
290 T ROWE PRICE EQUITY INCOME FD SH BEN INT		2011-05-24	2011-12-20
730 T ROWE PRICE EQUITY INCOME FD SH BEN INT		2010-11-24	2011-12-20
3646 TCW FDS INC EMERGING MKTS INCOME FD CL I		2011-08-30	2011-12-20
2479 TEMPLETON INCOME TR TEMPLETON INTL BD FD ADVISOR		2011-08-30	2011-12-20
69 VANGUARD DIVIDEND APPRECIATION ETF [RIC]		2011-05-24	2011-12-20
205 VANGUARD DIVIDEND APPRECIATION ETF [RIC]		2010-12-27	2011-12-20
183 VANGUARD REIT ETF		2011-08-30	2011-12-20

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
46,841		47,897	-1,056
12,878		13,119	-241
11,378		10,980	398
43,788		42,044	1,744
7,808		7,025	783
26,101		22,323	3,778
15,786		14,894	892
13,630		12,606	1,024
23,009		13,194	9,815
82,959		83,751	-792
5,402		5,142	260
3,186		2,248	938
22,339		13,733	8,606
6,013		3,025	2,988
2,518		2,268	250
3,358		2,028	1,330
22,289		22,416	-127
38,976		36,068	2,908
7,917		7,685	232
4,503		2,495	2,008
72,893		67,505	5,388
52,427		52,193	234
14,693		11,545	3,148
6,691		6,953	-262
10,866		9,894	972
1,147		1,080	67
1,200		660	540
34,075		35,247	-1,172
34,586		34,776	-190
2,552		2,505	47

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
56,893		55,030	1,863
28,379		25,766	2,613
15,518		16,280	-762
7,318		7,876	-558
13,308		16,257	-2,949
5,497		6,579	-1,082
3,351		3,688	-337
26,037		28,378	-2,341
63,530		54,329	9,201
14,552		10,719	3,833
248		180	68
6,294		4,560	1,734
39,472		39,859	-387
2,060		2,151	-91
19,325		19,628	-303
4,986		5,590	-604
4,025		2,255	1,770
5,014		3,396	1,618
5,157		6,334	-1,177
37,799		36,930	869
6,569		7,160	-591
16,535		16,243	292
30,080		31,694	-1,614
27,616		29,798	-2,182
3,734		3,854	-120
11,094		10,791	303
10,502		10,392	110

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-1,056
			-241
			398
			1,744
			783
			3,778
			892
			1,024
			9,815
			-792
			260
			938
			8,606
			2,988
			250
			1,330
			-127
			2,908
			232
			2,008
			5,388
			234
			3,148
			-262
			972
			67
			540
			-1,172
			-190
			47

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			1,863
			2,613
			-762
			-558
			-2,949
			-1,082
			-337
			-2,341
			9,201
			3,833
			68
			1,734
			-387
			-91
			-303
			-604
			1,770
			1,618
			-1,177
			869
			-591
			292
			-1,614
			-2,182
			-120
			303
			110

TY 2011 Accounting Fees Schedule

Name: KUTSCHE CHARITABLE TRUST

EIN: 38-6610379

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE	870	435		435

TY 2011 Investments - Other Schedule**Name:** KUTSCHE CHARITABLE TRUST**EIN:** 38-6610379

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ISHARES MSCI EMERGING	AT COST	45,916	58,617
FIFTH THIRD HIGH YIELD BD FD	AT COST	88,329	93,605
ISHARES BARCLAY'S TIPS BD	AT COST	43,055	47,843
ISHARES S&P PEF STK	AT COST	95,718	93,146
PIMCO TOTAL RETURN FUND	AT COST	292,140	298,920
ROYCE FUND TOTAL RETURN FUND	AT COST	14,537	15,600
FIDELITY ADV SMALL	AT COST	14,237	15,808
DODGE & COX INCOME FUND	AT COST	297,736	297,523
FIDELITY ADV NEW INSIGHTS	AT COST	83,885	84,630
ISHARES S&P MIDCAP 400 VALUE	AT COST	12,825	19,223
OPPENHEIMER DVLPIING MKTS	AT COST	69,696	58,526
T ROWE PRICE EQUITY INCOME	AT COST	82,770	85,783
ROYCE FD PREMIER INVT	AT COST	102,487	104,267
VANGUARD DIVIDEND APPRECIATION	AT COST	191,138	206,577
TCW FUNDS INC EMERGING MARKETS	AT COST	73,498	69,669
TEMPLETON INC INTL BOND FUND	AT COST	75,481	69,955
HARBOR INTL	AT COST	61,143	58,757
HARDING LOEVNER FUNDS	AT COST	56,500	57,272
ISHARES S&P MIDCAP 400 GROWTH	AT COST	10,561	18,956
FIRST EAGLE GOLD FUND	AT COST	64,106	56,726
THE MERGER FUND	AT COST	84,929	81,530
PIMCO ALL ASSET ALL AUTH	AT COST	135,709	128,105
VANGUARD REIT ETF	AT COST	105,059	156,600

TY 2011 Other Assets Schedule

Name: KUTSCHE CHARITABLE TRUST

EIN: 38-6610379

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ACCRUED INCOME	7,022	1,812	0

TY 2011 Other Expenses Schedule

Name: KUTSCHE CHARITABLE TRUST

EIN: 38-6610379

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK SERVICE FEES	14,927	14,927		0
BANK SERVICE FEES	14,751	14,751		0

TY 2011 Taxes Schedule

Name: KUTSCHE CHARITABLE TRUST

EIN: 38-6610379

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX ESTIMATE	922	0		0
FOREIGN TAXES ON QUALIFIED FOR	741	741		0
FOREIGN TAXES PAID - NQDI	54	54		0