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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.

For	cale	ndar year 2011 or tax year beginning			, and e	nding		
Nai	ne o	of foundation					A Employer identification	number
M	ARY	ELLA JEROME FAMILY FOUNDATION, INC	•				39-2001356	
Nur	nber	and street (or P O box number if mail is not delivered to street	address	)		Room/suite	B Telephone number	
1	480	EAST MAPLE AVENUE					(715) 537-3511	
Crty	or or	town, state, and ZIP code					C If exemption application is p	ending, check here
_B	ARR	ON, WI 54812		_				
G	Chec	k all that apply: Initial return		Initial return of a fo	ormer public o	harity	D 1. Foreign organizations	s, check here
		Final return		Amended return			Foreign organizations mo	oting the 85% test
		Address change		Name change			2. check here and attach co	imputation
H (	_	k type of organization: X Section 501(c)(3) ex					E If private foundation stat	
<u>_</u>				axable private found			under section 507(b)(1)	(A), check here
I Fa	air m	narket value of all assets at end of year   J   Accounti	-		Accr	ual	F If the foundation is in a (	
			her (sp		<del></del>		under section 507(b)(1)	(B), check here
_	-\$	876 , 753 . (Part I, colu	mn (d)	must be on cash	basis.)			T (4)
Pa	art	(The total of amounts in columns (b), (c), and (d) may not		Revenue and      penses per books		vestment ome	(c) Adjusted net income	(d) Disbursements for chantable purposes
	-	necessarily equal the amounts in column (a)		•			N/A	(cash basis only)
	1		$\vdash$	1,700.			M/A	
	2	Interest on savings and temporary		2.		2.		STATEMENT1
	4	cash investments Dividends and interest from securities		22,167.		22,167.		STATEMENT2
	Ι.	a Gross rents		22,107.		20,107,		
	1	Net rental income or (loss)	<u> </u>	<del>-</del> ·				
	١.	Net gain or (loss) from sale of assets not on line 10		5,871.				
Revenue	ľ	b Gross sales price for all 83,298.		-,				
Š	٦	Capital gain net income (from Part IV, line 2)				5,871.		
æ	8	Net short-term capital gain						
	9		<del></del>					
	1 -	Income modifications Gross sales less returns and allowances  RECEIVED	$\vdash \vdash$		· · · · · ·			
	1	b Less Cost of goods sold	TQ.					
		c Gross profit or (loss) MAY 2 1 2012	löi					
	11	Other income   m	S					
	12	Total. Add lines 1 through 1	1=1	29,740.		28,040.		
	13	Compensation of officers, directors, trostees, etc.		0.		0.		0.
	14	Other employee salaries and wages						
10	15							
enses	16	a Legal fees						
ber	.[	b Accounting fees STMT 3	<u> </u>	1,700.		0.		1,700.
Exp		c Other professional fees	<u> </u>			- <del>-</del> .		
tive	17				ļ			_
itra	18	-		617.		117.		0.
Ë	19	•					<u> </u>	***************************************
and Administrative	20	• •	<u> </u>	<del></del>	<u> </u>		<del> </del>	<del> </del>
ıd Adır	21		├				<del> </del>	
ating an	22	•	-	10.	1	0.	-	10.
Operating	23			10.		· · · · · · · · · · · · · · · · · · ·		10.
era	29	expenses. Add lines 13 through 23		2,327.		117,	1	1,710.
ô	25	Contributions, gifts, grants paid	$\vdash$	85,620.	<del>                                     </del>			85,620.
		Total expenses and disbursements.	$\vdash$	05,020.				33,020.
Ope	[	Add lines 24 and 25		87,947.		117,		87,330.
	27	Subtract line 26 from line 12:	<del>                                     </del>	,,-	-			
)		Excess of revenue over expenses and disbursements	1	-58,207.	<u> </u>			
		b Net investment income (if negative, enter -0-)		, ,	<del>                                     </del>	27,923.		
		C Adjusted net income (if negative, enter -0-)			<u> </u>	·	N/A	

123501 12-02-11 LHA For Paperwork Reduction Act Notice, see instructions. Form **990-PF** (2011)

	_ این	TULA	Havillues	anu nei	assets/lulit	<i>i</i> valalices			1	
Ξ										
n	1	1 111	Analve	ie ot (	Change	: IN NAT	Decote	or Fund	Ralance	26

Foundations that do not follow SFAS 117, check here

28 Paid-in or capital surplus, or land, bldg., and equipment fund

29 Retained earnings, accumulated income, endowment, or other funds

	····	
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]	930,886.
2 Enter amount from Part I, line 27a	2	-58,207.
3 Other increases not included in line 2 (itemize)	3	0.
4 Add lines 1, 2, and 3	4	872,679.
5 Decreases not included in line 2 (itemize) ► GAIN/LOSS DIFFERENCE	5	52.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	872,627.

0

0

930,886

930,886

930,886,

0.

872,627

872,627

872,627

 $\triangleright$   $\boxed{x}$ 

26 Permanently restricted

and complete lines 27 through 31. Capital stock, trust principal, or current funds

30 Total net assets or fund balances

F	Part IV Capital Gains	and Lo	osses for Tax on In	vestment	Income						
			ind(s) of property sold (e.g. or common stock, 200 shs			I P	low ac - Purcl - Dona	nase	c) Date ad (mo., day		(d) Date sold (mo., day, yr.)
1a	77 SHS OF ISHARES S&F	500 I	NDEX					P 1	2/29/0	5	03/21/11
b	3673.095 SHS OF PIMCO				P (	5/31/0	2	03/23/11			
_	2705.14 SHS OF PIMCO		RETURN					P (	5/31/0	2	08/10/11
	CAPITAL GAINS DIVIDEN	IDS .									
e	B					Ц.					_
	(e) Gross sales price	(f)	Depreciation allowed (or allowable)		st or other basis expense of sale					n or (loss (f) minus	
а	•				9,6	_					363.
b	<del></del>				39,0						964.
-	•				28,7	38.					1,227.
d											3,317.
е		2012.12	column (h) and award by	ha faundation	on 10/01/60						
_	Complete only for assets show		<del></del>	ſ						l. (h) gain ot less thai	
	(i) F.M.V. as of 12/31/69		(j) Adjusted basis as of 12/31/69		cess of col. (ı) col. (ı), if any			0011		from col. (	
_		<del> </del>	40 01 120 1700								363.
a											964.
	<u>,                                    </u>	<del> </del>				_					1,227.
_	·		<del></del>		<del></del>						3,317.
e											5,527.
Ť		1	∫ If gain, also enter	ın Dart I line	<del></del>	7			<del></del>		
2	Capital gain net income or (net c	apıtal loss					2				5,871.
3	Net short-term capital gain or (lo	cc) ac def			•	1					
٠	If gain, also enter in Part I, line 8,			u (0).		J					
	If (loss), enter -0- in Part I, line 8	•	•				3			N/A	
F	Part V   Qualification U	Jnder S	Section 4940(e) for	Reduced	Tay on Net	lnv	estn	ent Inco	ome		
Ь					TUX OII IVE		•				
(Fo	or optional use by domestic privat		<del></del>								<u>-</u>
•		e foundati	ons subject to the section 4								<del></del>
i If s	section 4940(d)(2) applies, leave 1	e foundati	ons subject to the section 4	1940(a) tax on	net investment in	come					
if s Wa	section 4940(d)(2) applies, leave to	e foundati his part bi	ons subject to the section 4 lank.  tax on the distributable am	1940(a) tax on ount of any ye	net investment in ear in the base per	come					Yes X No
if s Wa	section 4940(d)(2) applies, leave the section 4940(d)(2) applies, leave the section for the se	e foundati his part bl ction 4942 lify under	ons subject to the section 4 lank.  tax on the distributable am section 4940(e). Do not co	1940(a) tax on ount of any ye mplete this pa	net investment in ear in the base per rt.	come					Yes X No
if s Wa	section 4940(d)(2) applies, leave the foundation liable for the sections, the foundation does not quarent the appropriate amount in	e foundati his part bl ction 4942 lify under	ons subject to the section 4 lank.  tax on the distributable am section 4940(e). Do not comm for each year, see instru	1940(a) tax on ount of any ye mplete this pa	net investment in ear in the base per rt.	riod?					
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If s Wa If "	section 4940(d)(2) applies, leave to as the foundation liable for the sectives," the foundation does not quate in the appropriate amount in (a)  Base period years Calendar year (or tax year beginn	e foundati his part bi ction 4942 lify under each colu	ons subject to the section 4 lank.  tax on the distributable am section 4940(e). Do not comm for each year, see instru	ount of any ye mplete this pa uctions before	net investment in ear in the base per rt.	riod?	.)	use assets		Distrit col. (b) div	(d) pution ratio rided by col. (c))
If s Wa If "	section 4940(d)(2) applies, leave to as the foundation liable for the sections of the section of	e foundati his part bi ction 4942 lify under each colu	ons subject to the section 4 lank.  tax on the distributable am section 4940(e). Do not comm for each year, see instru	ount of any yearnplete this paractions before tributions	net investment in ear in the base per rt. making any entrie	riod?	.)	use assets 913,861	(0	Distrit col. (b) div	(d) oution ratio rided by col. (c)) .136850
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If s Wa If "	section 4940(d)(2) applies, leave to as the foundation liable for the section of	e foundati his part bi ction 4942 lify under each colu	ons subject to the section 4 lank.  tax on the distributable am section 4940(e). Do not comm for each year, see instru	ount of any yemplete this partitions before tributions 125,062. 74,086. 54,397. 36,191.	net investment in ear in the base per rt. making any entrie	riod?	itable-	use assets 913,861 891,830 ,011,186 ,104,421	(c	Distrit col. (b) div	(d) Sutton ratio rided by col. (c)) . 136850 . 083072 . 053795 . 032769
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1f s Walf 1 2 3	section 4940(d)(2) applies, leave to as the foundation liable for the sectives," the foundation does not quate the appropriate amount in (a)  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	e foundation of the foundation of the foundation of the following in the f	ons subject to the section 4 lank.  tax on the distributable am section 4940(e). Do not comm for each year, see instru(b)  Adjusted qualifying dist  se period - divide the total of than 5 years  sets for 2011 from Part X, I	ount of any yemplete this partitions before tributions 125,062. 74,086. 54,397. 36,191. 45,996.	net investment in ear in the base per rt. making any entric Net value of no	come riod? (c) nchar	1 1	use assets 913,861 891,830 ,011,186 ,104,421	2 3 4 5	Distrit col. (b) div	(d) Sution ratio rided by col. (c))  .136850 .083072 .053795 .032769 .044261 .350747 .070149  908,868. 63,756.
Walf s Wa	section 4940(d)(2) applies, leave to as the foundation liable for the section. Yes," the foundation does not quate in the appropriate amount in the section of the appropriate amount in the appropriate	e foundation this part bitter 4942 bitter	ons subject to the section 4 lank.  Itax on the distributable am section 4940(e). Do not common for each year, see instruction.  Adjusted qualifying distributable am section 4940(e). Do not common for each year, see instruction.  (b)  Adjusted qualifying distributable am see period - divide the total of than 5 years.  Sets for 2011 from Part X, I	ount of any yemplete this partitions before tributions 125,062. 74,086. 54,397. 36,191. 45,996.	net investment in ear in the base per rt. making any entric Net value of no	come riod? (c) nchar	1 1	use assets 913,861 891,830 ,011,186 ,104,421	2 3 4 5 6	Distrit col. (b) div	(d) Dution ratio Inded by col. (c)) I 36850 I 083072 I 053795 I 032769 I 044261 I 350747 I 070149 I 908,868 I 63,756. I 279.
Walf s Wa	section 4940(d)(2) applies, leave to as the foundation liable for the sectives," the foundation does not quate the appropriate amount in (a)  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 incomed and lines 5 and 6  Enter qualifying distributions from	e foundation of the part by th	ons subject to the section 4 lank.  tax on the distributable am section 4940(e). Do not common for each year, see instruction (b)  Adjusted qualifying distributable am section 4940(e). Do not common for each year, see instruction (b)  Adjusted qualifying distributable am see period - divide the total of than 5 years  sets for 2011 from Part X, I	ount of any yearplete this partitions  125,062. 74,086. 54,397. 36,191. 45,996.	net investment in ear in the base per rt. making any entric Net value of no or by the number	come (c) (c) nchar	table-	use assets 913,861 891,830 ,011,186 ,104,421 ,039,202	2 3 4 5 6	Distrit col. (b) div	(d) Dution ratio Inded by col. (c)) I 36850 I 083072 I 053795 I 032769 I 044261 I 350747 I 070149 I 908,868 I 63,756. I 279.
Walf s Wa	section 4940(d)(2) applies, leave to as the foundation liable for the section. Yes," the foundation does not quate in the appropriate amount in the section of the appropriate amount in the appropriate	e foundation of the part by th	ons subject to the section 4 lank.  tax on the distributable am section 4940(e). Do not common for each year, see instruction (b)  Adjusted qualifying distributable am section 4940(e). Do not common for each year, see instruction (b)  Adjusted qualifying distributable am see period - divide the total of than 5 years  sets for 2011 from Part X, I	ount of any yearplete this partitions  125,062. 74,086. 54,397. 36,191. 45,996.	net investment in ear in the base per rt. making any entric Net value of no or by the number	come (c) (c) nchar	table-	use assets 913,861 891,830 ,011,186 ,104,421 ,039,202	2 3 4 5 6 7	Distrit col. (b) div	(d) Oution ratio Inded by col. (c)) I 36850 I 083072 I 053795 I 032769 I 044261 I 350747 I 070149 I 908,868. I 63,756. I 279. I 64,035.

	n 990-PF (2011) maky ELLA JEROME FAMILY FOUNDATION, INC.		001356			Page 4
	art VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or	<u>4948</u>	- see	instr	uctio	ns)
18	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1.					
_	Date of ruling or determination letter: (attach copy of letter if necessary-see instructions)	<u> </u>	ļ			
ì	Domestic foundations that meet the section 4940(e) requirements in Part V, check here x and enter 1%	1				279.
	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).	<u> </u> -				
_	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	ļ	_		0.
3		3	-			279.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	<u> </u>			0.
	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5				279.
	Credits/Payments:	.				
	2011 estimated tax payments and 2010 overpayment credited to 2011  Exempt foreign organizations - tax withheld at source  68  68	닉				
		4				;
	I Backup withholding erroneously withheld  6c  6d	┥				
	Total credits and payments. Add lines 6a through 6d	ــــ	ļ			F 2 F
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached	7	<u> </u>			535.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	8	<del> </del>			_
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	9	<del>                                     </del>			25.0
	Enter the amount of line 10 to be: Credited to 2012 estimated tax   256. Refunded	10	1			256.
	irt VII-A   Statements Regarding Activities	<u> </u>	<u> </u>			0.
	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or interver				Vec	No
	any political campaign?	IG III		1a	163	x
ь	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?			1b	-	x
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials publis.			"U		
	distributed by the foundation in connection with the activities.	ica oi				li
C	Did the foundation file Form 1120-POL for this year?			10		
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:			<del>- "</del>		<del>                                     </del>
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation	-				
	managers. ►\$ 0.				1	
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?			2		X
	If "Yes," attach a detailed description of the activities					
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation,	or		i		!
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes			3	1	x
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?			4a		х
þ	If "Yes," has it filed a tax return on Form 990-T for this year?	N	/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?			5		х
	If "Yes," attach the statement required by General Instruction T.					;
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:					Ì
	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.	te law				1
	remain in the governing instrument?			6	Х	
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.					
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)					
_	WI					
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)					
_	of each state as required by General Instruction G? If "No," attach explanation			8b	Х	<u> </u>
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for ca	endar				}
4.0	year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV			9		х
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses			10		lх

	1990-PF (2011) MARY ELLA JEROME FAMILY FOUNDATION, INC. 39-200135	-6		Page 5
Pa	irt VII-A   Statements Regarding Activities (continued)			
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
	section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		х
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			
	If "Yes," attach statement (see instructions)	12		х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	х	
	Website address N/A			
14	The books are in care of ► MARY ELLA JEROME Telephone no. ►715-537	-3511	-	
	Located at ▶ 1480 EAST MAPLE AVENUE, BARRON, WI			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		•	$\Box$
	and enter the amount of tax-exempt interest received or accrued during the year	N	/A	
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	16		x
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign		<b>-</b>	
	country			
Pa	rt 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.	1	Yes	No
1a	During the year did the foundation (either directly or indirectly):		1	
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	·	'	
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)		-	
	a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  Yes X No			-
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  Yes X No		1	
	(5) Transfer any income or assets to a disqualified person (or make any of either available	1		
	for the benefit or use of a disqualified person)?	1		
	· · · · · · · · · · · · · · · · · · ·			
	(6) Agree to pay money or property to a government official? (Exception, Check "No"		1	
	If the foundation agreed to make a grant to or to employ the official for a period after			
	termination of government service, if terminating within 90 days.)  Yes X No			, '
L	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations	ـ ا		
	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?  N/A	1b		ļ
	Organizations relying on a current notice regarding disaster assistance check here			
C	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected			
_	before the first day of the tax year beginning in 2011?	1c	<u> </u>	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation			
	defined in section 4942(j)(3) or 4942(j)(5)):	- 1		
а	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? Yes X No			
	If "Yes," list the years $\blacktriangleright$			
b	Are there any years listed in 2a for which the foundation is <b>not</b> 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 instructions.) N/A	2b		L
C	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here.		İ	
	<b>&gt;</b>	1		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time		ľ	
	during the year? $\qquad \qquad		1	
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		1	
	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		1	
	of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C,		1	
	Form 4720, to determine if the foundation had excess business holdings in 2011)	3b	1	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	T	x
	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that		T	
	had not been removed from jeopardy before the first day of the tax year beginning in 2011?	46		x

orm 990-PF (2011) MARY ELLA JEROME FAMILY FOUNDATION,	INC.		39-2001356		F	Page <b>6</b>
Part VII-B Statements Regarding Activities for Which I	orm 4720 May Be F	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	1 4945(e))?	Y	es X No	- 1		
(2) Influence the outcome of any specific public election (see section 4955); o	r to carry on, directly or indire	ectly,		- 1		
any voter registration drive?		Y	es X No			
(3) Provide a grant to an individual for travel, study, or other similar purposes	7	Y	es X No	ŀ		
(4) Provide a grant to an organization other than a charitable, etc., organization	n described in section			l		,
509(a)(1), (2), or (3), or section 4940(d)(2)?		Y	es X No	-	l	
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f	or				
the prevention of cruelty to children or animals?		Y	es 🗶 No	1		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	ler the exceptions described i	n Regulations		- 1		
section 53.4945 or in a current notice regarding disaster assistance (see instru	ctions)?		N/A	5b	_	
Organizations relying on a current notice regarding disaster assistance check h	ere					
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr	om the tax because it mainta	ıned				
expenditure responsibility for the grant?	N	/A 🔲 Ye	es 🔲 No			
If "Yes," attach the statement required by Regulations section 53.4945	5-5(d).			- 1		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on			- 1		
a personal benefit contract?		Ye	es 🗶 No	- 1		
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?			6b		x
If "Yes" to 6b, file Form 8870.			Γ			
7a At any time during the tax year, was the foundation a party to a prohibited tax s	helter transaction?	Ye	es 🗶 No			
b If "Yes," did the foundation receive any proceeds or have any net income attribu	table to the transaction?		N/A	7b		
Part VIII Information About Officers, Directors, Trust	ees, Foundation Ma	nagers, Highly	1			
1 List all officers, directors, trustees, foundation managers and their		Lt. Companyation	/a\.			
(a) Name and address	(b) Title, and average hours per week devoted	(c) Compensation (If not paid,	(d) Contributions to employee benefit plans and deferred	act	e) Expe count,	ense other
	to position	`enter -0-)	and deterred compensation	а	llowar	ices
MARY ELLA JEROME	DIRECTOR			:		
480 EAST MAPLE AVENUE						
BARRON, WI 54812	20.00	0.	0.			<u> </u>
	DIRECTOR			ł		
480 EAST MAPLE AVENUE		_	_			_
BARRON, WI 54812	1.00	0.	0.	₩.		<u> </u>
	DIRECTOR					
480 EAST MAPLE AVENUE	4 00					_
BARRON, WI 54812	1.00	0.	0.	<del> </del>		0.
				1		
2 Compensation of five highest-paid employees (other than those inc	luded on line 1) If none	enter "NONE "				
	(b) Title, and average	i	(d) Contributions to	10	e) Exp	ense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred	acc	Expectation () Expect	other
NONE	devoted to position		compensation	<del>      °</del>	illowai	1003
				l		
			·······			
· <u>-</u> · · · · · · · · · · · · · · · · · · ·	-			<del>                                     </del>		
·						
				$\vdash$		
1						
·····	<u>-</u>		-	t		
		]				
otal number of other employees paid over \$50,000	· .	·	<b>•</b>			0

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Part VIII Information About Officers, Directors, Trustees, Founda Paid Employees, and Contractors (continued)	tion Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter	· "NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	7	
	7	
	7	
	7	
Total number of others receiving over \$50,000 for professional services		<b>&gt;</b> (
Part IX-A Summary of Direct Charitable Activities		· · · · ·
List the foundation's four largest direct charitable activities during the tax year. Include relevant statist number of organizations and other beneficiaries served, conferences convened, research papers prod	ical information such as the uced, etc.	Expenses
1 N/A		
		0.
2		
3		
4		
D-MV Blo		
Part IX-B Summary of Program-Related Investments	In the state of th	
Describe the two largest program-related investments made by the foundation during the tax year on largest program-related investments made by the foundation during the tax year on largest program-related investments made by the foundation during the tax year on largest program-related investments made by the foundation during the tax year on largest program-related investments.	ines 1 and 2.	Amount
1 N/A		
		_
2		0.
All other program-related investments. See instructions.	<del></del>	<del></del>
3 N/A		
	1	

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▶

0. 0.

Total. Add lines 1 through 3

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations, s	ee instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1ã	899,413.
	Average of monthly cash balances	1b	23,296.
	Fair market value of all other assets	1c	<del></del>
d	Total (add lines 1a, b, and c)	1d	922,709.
е	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	922,709.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	13,841.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	908,868.
6	Minimum investment return. Enter 5% of line 5	6	45,443.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here   ■ and do not complete this part.)	d certain	
1	Minimum investment return from Part X, line 6	1	45,443.
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	279.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	45,164.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	45,164.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	45,164.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		07 220
	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	87,330.
	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	Suitability test (prior IRS approval required)	3a	
	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	87,330.
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	5	279.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	87,051.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of 4940(e) reduction of tax in those years.	qualifies for	the section

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#### Part XIII Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount fo	r 2011 from Part XI.				
line 7	. 25				45,164.
2 Undistributed income, if any	, as of the end of 2011				
a Enter amount for 2010				0.	
b Total for prior years:	•			· · · · · · · · · · · · · · · · · · ·	
,	,		0.		
3 Excess distributions car	ryover, if any, to 2011:			, , , , , , , , , , , , , , , , , , , ,	
a From 2006					
<b>b</b> From 2007	18,074.				
c From 2008	54,397.				
d From 2009	74,495.				
e From 2010	125,510.				
f Total of lines 3a through	h e	272,476.			
4 Qualifying distributions	for 2011 from				
Part XII, line 4: ▶\$	87,330.				
a Applied to 2010, but no	t more than line 2a			0.	
b Applied to undistributed	I income of prior				
years (Election required	- see instructions)		0.		
c Treated as distributions	out of corpus				
(Election required - see	instructions)	87,330.			
d Applied to 2011 distribu	itable amount				0.
e Remaining amount distr	ributed out of corpus	0.			
5 Excess distributions carryov (If an amount appears in columnust be shown in column (a	umn (d), the same amount	45,164.			45,164.
6 Enter the net total of ea	''				
a Corpus Add lines 3f, 4c, an	d 4e. Subtract line 5	314,642.			
b Prior years' undistribute	i i				
line 4b from line 2b	d moomo. Cabtract		0.		
c Enter the amount of price	nr vears'				
undistributed income fo deficiency has been issu the section 4942(a) tax assessed	r which a notice of ued, or on which		0.1		
d Subtract line 6c from lin	e 6b. Taxable				
amount - see instruction	ns I		0.		
e Undistributed income fo	r 2010. Subtract line				
4a from line 2a. Taxable	amount - see instr.			0.	
f Undistributed income fo	r 2011. Subtract			-	
lines 4d and 5 from line	1. This amount must				
be distributed in 2012				;	0.
7 Amounts treated as dist	ributions out of				
corpus to satisfy require	ements imposed by				
section 170(b)(1)(F) or	4942(g)(3)	0.			
8 Excess distributions car	ryover from 2006				
not applied on line 5 or	line 7	0.			
9 Excess distributions ca	rryover to 2012.				
Subtract lines 7 and 8 fr	om line 6a	314,642.			
O Analysis of line 9:					
a Excess from 2007				<u> </u>	
<b>b</b> Excess from 2008	27,307.				
c Excess from 2009	74,495.				
d Excess from 2010	125,510.				
e Excess from 2011	87,330.				

		JEROME FAMILY FOU			39-2001	356 Page 10
	rt XIV Private Operating F			-A, question 9)	N/A	
1 a	If the foundation has received a ruling o					
	foundation, and the ruling is effective for	•	•	▶	, , , , , , , , , , , , , , , , , , , ,	
	Check box to indicate whether the found	lation is a private operation	ng foundation described i		4942(j)(3) or49	42(j)(5)
2 a	Enter the lesser of the adjusted net	Tax year		Prior 3 years		
	income from Part I or the minimum	(a) 2011	(b) 2010	(c) 2009	(d) 2008	(e) Total
	investment return from Part X for					-
	each year listed					
b	85% of line 2a					
C	Qualifying distributions from Part XII,				<u> </u>	
	line 4 for each year listed			İ		
d	Amounts included in line 2c not		<u>"</u>			<del>- · -</del>
	used directly for active conduct of					
	exempt activities					
۰	Qualifying distributions made directly				<del> </del>	
٠	for active conduct of exempt activities.					
	Subtract line 2d from line 2c					
3				<u> </u>		
	alternative test relied upon:					
а	"Assets" alternative test - enter:					
	(1) Value of all assets					
	(2) Value of assets qualifying					
	under section 4942(j)(3)(B)(i)					
D	"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					
Pa	irt XV   Supplementary Info	rmation (Comple	te this part only	l if the foundation	n had \$5 000 or me	are in assets
<u> </u>	at any time during t			ii tiio iodiidatio		)
1	Information Regarding Foundatio	<del>-</del>				<del></del>
	List any managers of the foundation who	•	than 2% of the total cont	ributions received by th	e foundation before the clos	se of any tay
	year (but only if they have contributed m			indutions received by the	o touridation botore tric cio.	oc or any tax
MAR	Y ELLA JEROME	, ,	. ,, ,,			
	List any managers of the foundation who	n own 10% or more of th	e stock of a cornoration (	or an equally large port	ion of the ownership of a n	ertnerehin or
·	other entity) of which the foundation has	s a 10% or greater interes	e stock of a corporation ( St.	or an equally large port	ion of the ownership of a pi	arthership or
NON		-				
2	Information Regarding Contributi	on Grant Gift Loan	Scholarchin etc. Pr			
-	Check here ► x If the foundation o				not accept uncollected requi	ests for funds. If
	the foundation makes gifts, grants, etc.					
a	The name, address, and telephone numl	<u> </u>				<u> </u>
n/a	•	oo. Of the person to who	approauono orionia De	a.a.i 0000a.		
	The form in which applications should b	e submitted and informat	tion and materials they sh	ould include.	<del></del>	
N/A			and materials they st			
	Any submission deadlines:				·-	
N/A	·					
d	Any restrictions or limitations on awards	s, such as by geographica	al areas, charitable fields,	kınds of institutions, or	other factors:	
N/A						

Part'XV Supplementary Information (continued) 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 status of recipient **Amount** any foundation manager or substantial contributor Name and address (home or business) a Paid during the year BARRON AREA COMMUNITY CENTER NONE OPERATING PUBLIC 800 MEMORIAL DRIVE BARRON, WI 54812 1,122. BARRON AREA EDUCATION FOUNDATION NONE PUBLIC OPERATING 100 WEST RIVER AVE. BARRON, WI 54812 9,000. BARRON AREA SCHOOL DISTRICT NONE PUBLIC OPERATING 100 WEST RIVER AVE. BARRON, WI 54812 2,998. BLUE EARTH AREA EDUCATIONAL NONE PUBLIC OPERATING ASSISTANCE 117 WEST 5TH STREET, PO BOX 95 BLUE EARTH, MN 56013 11,000. MINNESOTA STATE UNIVERSITY MANKATO NONE PUBLIC OPERATING POUNDATION 126 ALUMNI FOUNDATION CENTER MANKATO, MN 56001 16,000. SEE CONTINUATION SHEET(S) 85,620. Total ➤ 3a **b** Approved for future payment NONE 0. Total

Part XV Supplementary Information							
3 Grants and Contributions Paid During the							
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount			
Name and address (home or business)	any foundation manager or substantial contributor	recipient					
SHELL LAKE ARTS CENTER	NONE	PUBLIC	OPERATING	1			
PO BOX 315, 802 FIRST STREET	10112	0000	51 21G11 1110				
SHELL LAKE, WI 54871				1,000.			
VIII. TAVI GLATER TOVERNATON	1000	h-m	D TO THE TAXA				
UW EAU CLAIRE FOUNDATION PO BOX 4004	NONE	PUBLIC	OPERATING				
EAU CLAIRE, WI 54702				6,000.			
				3,353.			
UW RIVER FALLS FOUNDATION	NONE	PUBLIC	OPERATING				
410 SOUTH THIRD STREET							
RIVER FALLS, WI 54022		<del> </del>		34,000.			
WISCONSIN FEDERATION OF MUSIC CLUBS	NONE	PUBLIC	OPERATING				
7084 W. GREYHAWK LANE							
FRANKLIN, WI 53132				4,500.			
	<del></del>	<del> </del>	<del> </del>	<del>                                       </del>			
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			<del></del>	<u> </u>			
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				•			
				,			
	<del> </del>	<del>                                     </del>					
Total from continuation sheets	<u> </u>	<u> </u>		45,500.			
Total Holli Collulination Sheets	<del> </del>			45,500.			

## Part XVI-A Analysis of Income-Producing Activities

	Therefore 216	unaimaga inda aasa			· · · · · · · · · · · · · · · · · · ·
Enter gross amounts unless otherwise indicated.	(a) Business	(b) Amount	(C) Exclu- sion	y section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
1 Program service revenue:	code	Amount	code	Amount	
a					
b	.				
<u> </u>	.				
d	.		4		
e			<u> </u>		
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments		_			
3 Interest on savings and temporary cash					
investments	L		14	2.	
4 Dividends and interest from securities			14	22,167.	
5 Net rental income or (loss) from real estate:					,
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal	1-				
property					
7 Other investment income			+-+	<u>.                                      </u>	·
8 Gain or (loss) from sales of assets other	<del></del>		+++		
than inventory			18	5,871.	
9 Net income or (loss) from special events	<del></del>		+-"+		
10 Gross profit or (loss) from sales of inventory	<del></del>		+-+-		····
11 Other revenue:	<b></b>		+ +		
<u> </u>			+		
b	·				
<u> </u>					
d			$\bot$		
e					
12 Subtotal. Add columns (b), (d), and (e)		0	).	28,040.	0.
13 Total. Add line 12, columns (b), (d), and (e)				13	28,040.
(See worksheet in line 13 instructions to verify calculations.)					
Part XVI-B Relationship of Activities	to the Accom	plishment of F	xempt P	urnoses	
Line No. Explain below how each activity for which inco			A contributed	importantly to the accomp	olishment of
the foundation's exempt purposes (other than	by providing funds	for such purposes).			
N/A		-			
				<del>-</del>	
			- ·		
			<u>-</u>		·
		· ·			
	<del>.</del>			· <del>-</del> · · ·	<u> </u>
	<del> </del>				
					<del></del>
<del></del>					<del></del>
		<del></del> .			

Part XV		LA JEROME PANILY FOUNDA egarding Transfers To a hizations	TION INC. and Transactions a	nd Relationsh	39-2001356 ips With Nonchar			ge 13
1 Did the	organization directly or Indi-	rectly engage in any of the followin	g with any other organizatio	n described in secto	n 501(c) of	1	Yes	No
the Coo	de (other than section 501(c	:)(3) organizations) or in section 52	7, relating to political organi	izations?	• •	1 [		
		lation to a noncharitable exempt on						
						1a(1)		x
(2) 01					, ,	1a(2)		X
	ransactions:					13327		
		able exempt organization				16(1)		x
(2) Pu	rchases of assets from a no	onchantable exempt organization				16(2)		X
(3) Re	ental of facilities, enumment	or other assets				16(3)		x
(A) Re	atnement arrangements		*** ******* * ** ***			1b(4)		x
						16(5)		x
		embership or fundraising solicitation				-		$\overline{}$
c Sharine	n of facilities equipment ma	alling lists, other assets, or paid em	mlawace		· ·	1b(6)		X
		"Yes," complete the following sche						X
		foundation. If the foundation receive					:15,	
		other assets, or services received.		ic iii aliy u alisacuoli t	n enginiñ mi anfienient' zi	ום איטו		
(a) Line no	(b) Amount involved	(c) Name of nonchantable		(4) =				<del></del>
14/0/8/10	(b) ranoultinyoned		e evenible or Bennessons	(u) Description o	of termina, transactions, and s	um ind atte	angeme	mis —
		N/A		<del> </del>	<del></del> -			
-+		<del> </del>		<del></del>				
	<del></del>	<del></del>		<del> </del>	<del></del>			
		<del></del>		<del></del>				
	<del></del>	<del> </del>		<b>-</b>				
$\longrightarrow$	· · · · · · · · · · · · · · · · · · ·	<u></u>						
			<del></del>					
					<del></del>			
	<u> </u>	<u> </u>						
		1						
m sect			tion 527?			∵ Yes		] No
	(a) Name of or	ganization	(b) Type of organization	(1	) Description of relationsh	цр		
			N/A		<del></del>			
			<del> </del>	<del></del>	<del> </del>			
			ļ	<u> </u>				
	<del></del>		<u> </u>	ļ	<del></del>			
Sign Here	oder penalties of perjury. I declarated before, at its true, correct, and company and comp	a that I have extendined thus return, including property for the Selles Wome.	ng eccompanying schedules and in texpeyer) is based on all inform      5   12   2 0 12     Date	nation of which preparer	nas any knowledge. Maj retu sho	the IAS domestic the IA	prepa	rer
	Print/Type preparer's n	name / Preparer's s			Check if PTIN			
			Λ	1 " '	self- employed			
Paid	Sound Dod	ten Samb	a Kledden 100	612 112	vp.o, ou			
Prepare	Furnic name A			171414	Circula CIN D			
Use On	TOTAL OF DEED	HTTE TAX LLP			Firm's EIN 🕨			
USE VII	·				· · · · · · · · · · · · · · · · · · ·			
	L L	SCOTH SIXTH STREET, ST	B 2800					
	<u> MI</u>	NNEAPOLIS MN 55402			Phone no. 612-391	7-4000 rm <b>990</b>		(2011)
					10	555		(=0 11)

FORM 990-PF	INTEREST	ON	SAVINGS	AND	TEMPORARY	CASH	INVESTMENTS	STATEMENT	1
SOURCE								AMOUNT	
FIDELITY									2.
TOTAL TO FOR	M 990-PF,	PAR'	T I, LII	NE 3,	, COLUMN A				2.

FORM 990-PF DIVIDENDS AND	INTEREST FROM	SECURITIES	STATEMENT 2
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
FIDELITY SELECT MONEY MARKET	4.	0.	4.
HARBOR INTERNATIONAL RETAIL	506.	0.	506.
ISHARES S&P 500 INDEX	4,435.	0.	4,435.
PENNSYLVANIA MUTUAL	169.	0.	169.
PENNSYLVANIA MUTUAL	3,317.	3,317.	0.
PIMCO TOTAL RETURN	16,684.	0.	16,684.
UMB SCOUT WORLDWIDE	369.	0.	369.
TOTAL TO FM 990-PF, PART I, LN 4	25,484.	3,317.	22,167.

FORM 990-PF	ACCOUNTI	NG FEES	S	STATEMENT 3		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
ACCOUNTING FEES	1,700.	0.		1,700.		
TO FORM 990-PF, PG 1, LN 16B	1,700.	0.		1,700.		

FORM 990-PF	TAX	ES	STATEMENT 4		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES FEDERAL TAX	117. 500.	117.		0.	
TO FORM 990-PF, PG 1, LN 18	617.	117.		0.	

FORM 990-PF	OTHER E	XPENSES	STATEMENT 5		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
DEPARTMENT OF FINANCIAL INSTITUTIONS	10.	0.		10.	
TO FORM 990-PF, PG 1, LN 23	10.	0.		10.	

FORM 990-PF C	ORPORATE STOCK		STATEMENT	6
DESCRIPTION	воок	VALUE	FAIR MARKET	r
PIMCO TOTAL RETURN FUND	<del></del>	403,271.	412,	148.
HARBOR INTERNATIONAL		20,650.	21,	139.
ISHARES S&P 500		214,293.	214,	510.
PENNSYLVANIA MUTUAL		98,177.	97,	521.
UMB SCOUT WORLDWIDE		21,806.	21,	432.
WILLIAM BLAIR SM CAP GROWTH		91,853.	87,	426.
TOTAL TO FORM 990-PF, PART II, LI	NE 10B	850,050.	854,	176.

MARY ELLA JEROME FAMILY FOUNDATION, INC. 39-2001356

ATTACHMENT TO FORM 990-PF, PART XIII, LINE 4c

FOR THE TAX PERIOD ENDED DECEMBER 31, 2011

#### **Election to Treat Qualifying Distributions as Distributions Out of Corpus**

The Foundation Manager, Mary Ella Jerome, hereby elects to treat the 2011 qualifying distribution of \$87,330 as a distribution out of corpus under Treasury Regulation § 53.4942(a)-3(d)(2).

Mary Ella Glome
Mary Ella perome

May 12, 2012
Date