

See a Social Security Number? Say Something! Report Privacy Problems to https://public.resource.org/privacy Or call the IRS Identity Theft Hotline at 1-800-908-4490



Return of Private Foundation

OMB No 1545-0052 Form **990-PF** or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation Department of the Treasury Note The foundation may be able to use a copy of this return to satisfy state reporting requirements Internal Revenue Service For calendar year 2011 or tax year beginning , and ending Name of foundation A Employer identification number DEAN AND JUANITA MITCHELL FOUNDATION 42-1082307 Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number 305 C/O BROOKS LODDEN, 1441 29TH STREET (515)223-7300 City or town, state, and ZIP code C If exemption application is pending, check here WEST DES MOINES, IA 50266 Initial return G Check all that apply: Initial return of a former public charity D 1. Foreign organizations, check here Fınal return Amended return Foreign organizations meeting the 85% test, 2. check here and attach computation X Address change Name change X Section 501(c)(3) exempt private foundation H Check type of organization: E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation under section 507(b)(1)(A), check here I Fair market value of all assets at end of year | J | Accounting method: X Cash l Accruat If the foundation is in a 60-month termination Other (specify) (from Part II, col. (c), line 16) under section 507(b)(1)(B), check here 340,055. (Part I, column (d) must be on cash basis) ▶\$ Part I Analysis of Revenue and Expenses (d) Disbursements (b) Net investment (a) Revenue and (c) Adjusted net (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) for charitable purposes (cash basis only) expenses per books income income 1,862 N/A Contributions, gifts, grants, etc., received Check Tribe foundation is not required to attach Sch B Interest on savings and temporary cash investments 17,713 17,713 STATEMENT Dividends and interest from securities 5a Gross rents b Net rental income or (loss) 392. 6a Net gain or (loss) from sale of assets not on line 10 40,000. 392 7 Capital gain net income (from Part IV, line 2) Net short-term capital gain Income modifications Gross sales less returns and allowances b Less Cost of goods sold c Gross profit or (loss) Other income 11 19,967 18,105 Total. Add lines 1 through 11 0. Compensation of officers, directors, trustees, etc Other employee Salalyes and wages SCANNED JUE Pension plans, employee benefits 15 16a Legal fees b Assountido lees 2 2 2012 EMT 2 1,620 1,620 0. Other professional fee Interest OGDEN 17 242 242 STMT 3 0. 18 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications Operating 23 Other expenses 24 Total operating and administrative

c Adjusted net income (if negative, enter -0-) 123501 12-02-11 LHA For Paperwork Reduction Act Notice, see instructions.

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

expenses. Add lines 13 through 23

25 Contributions, gifts, grants paid 26 Total expenses and disbursements.

Add lines 24 and 25 27 Subtract line 26 from line 12:

Form 990-PF (2011)

0.

19,282.

19,282.

1,862

19,282

21,144

-1,177

1,862

1.862

16,243

N/A

For	n 9 <u>9</u>	0-PF (2011) DEAN AND JUANITA MITCHEL			L082307 Page 2
P	art	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of	<u> </u>
_			(a) Book Value	(b) Book Value	(c) Fair Market Value
		Cash - non-interest-bearing			
		Savings and temporary cash investments	62,296.	102,308.	102,308.
ļ	3	Accounts receivable ► 1,290.	1 000	1 000	
1		Less: allowance for doubtful accounts	1,290.	1,290.	
	4	Pledges receivable			
	_	Less: allowance for doubtful accounts			
		Grants receivable			
	б	Receivables due from officers, directors, trustees, and other			
	-	disqualified persons			
	1	Other notes and loans receivable Less: allowance for doubtful accounts			
		Inventories for sale or use			
Assets	0	Prepaid expenses and deferred charges			
Ass	100	Investments - U.S. and state government obligations			
		Investments - corporate stock STMT 4	150,959.	149,378.	195,981.
	_	Investments - corporate bonds STMT 5	64,038.	24,430.	27,915.
	11	Investments - land, buildings, and equipment basis	0 = 7 0 3 0 .	24,450.	21,515.
		Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other STMT 6	19,047.	19,047.	13,851.
	14	Land, buildings, and equipment: basis			
		Less accumulated depreciation			
	15	Other assets (describe ▶)			
	16	Total assets (to be completed by all filers)	297,630.	296,453.	340,055.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
es	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
jab	21	Mortgages and other notes payable			
_	22	Other liabilities (describe >)			
		T + 111 11111 (add been 47 the cost 00)	0	0	
_	23		0.	0.	
S	24	and complete lines 24 through 26 and lines 30 and 31 Unrestricted			
ŭ	24	Temporarily restricted			
3ala	26	Permanently restricted			
Fund Balances	20	Foundations that do not follow SFAS 117, check here			
Ξ		and complete lines 27 through 31			
٥	27	Capital stock, trust principal, or current funds	297,630.	296,453.	
sets	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
Ass	29	Retained earnings, accumulated income, endowment, or other funds	0.	0.	
Net Assets or	30	Total net assets or fund balances	297,630.	296,453.	
-					
	31	Total liabilities and net assets/fund balances	297,630.	296,453.	<u></u>
Œ	art	III Analysis of Changes in Net Assets or Fund B	alances		
_					
1		Il net assets or fund balances at beginning of year - Part II, column (a), line	30		000 600
	•	st agree with end-of-year figure reported on prior year's return)		1	297,630.
2		er amount from Part I, line 27a		2	-1,177.
3		er increases not included in line 2 (itemize)		3	296,453.
4		Innes 1, 2, and 3 reases not included in line 2 (itemize)		4	296,453.
5 6		at net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	olumn (h). line 30		296,453.
<u> </u>	1 010	active accord or raine scalarious at one or your time a triming into of a ditti, of			Form 990-PF (2011)

(a) List and desci 2-story brick wa	tibe the kind(s) of property sold (e. rehouse; or common stock, 200 st	g , real estate, hs MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acq (mo , day,	ured yr.)	(d) Date sold (mo., day, yr.)
a FORD MOTOR CRE	DIT CO			P	03/27/	/02	10/25/11
b	····						
<u>c </u>							
<u>d</u> e				 			
(e) Gross sales price	(f) Depreciation allowed (or allowable)		t or other basis xpense of sale		(h) Gain (e) plus (f)		
a 40,000.			39,60	8.			392
)	<u> </u>						
c		 					
i							
Complete only for assets showing	ng gain in column (h) and owned by	v the foundation	on 12/31/60		(I) Coine (Cal	(b) agus	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Ex	cess of col. (I)		(I) Gains (Col. col. (k), but not Losses (fro	less tha	ın -0-) or
	83 01 12/3 1/03	- 0401	coi. ()), ii aiiy				392
<u>a</u> b		+					394
C							
d							
e							
Capital gain net income or (net ca		ter in Part I, line -0- in Part I, line	7 7	} 2			392
Net short-term capital gain or (lo	•						
If gain, also enter in Part I, line 8, If (loss), enter -0- in Part I, line 8	column (c).			} 3		N/F	<u> </u>
Part V Qualification U	Inder Section 4940(e) fo	or Reduced	Tax on Net	Investment	income		
section 4940(d)(2) applies, leave to vas the foundation liable for the section to the section of	tion 4942 tax on the distributable a	complete this pa	ırt.			_	Yes X No
(a) Base period years Calendar year (or tax year beginn	(b)			(c) encharitable-use as	ssets (or	Distri	(d) ibution ratio ivided by col. (c))
2010	"'9 "''/	20,474.		333,4		JI (D) UI	.06140
2009		22,314.		280,0			.07969
2008		20,867.		295,8			.07052
2007		20,320.		341,2			.05954
2006		16,707.		324,3	373.		.05150
Total of line 1, column (d)					2		.32267
Average distribution ratio for the the foundation has been in existe		ai on line 2 by 5,	or by the number	ot years	3		.06453
Enter the net value of noncharita	ble-use assets for 2011 from Part)	X, line 5			4		344,769
Multiply line 4 by line 3					5		22,250
Enter 1% of net investment inco	me (1% of Part I, line 27b)				6		162
7 Add lines 5 and 6					7		22,412
B Enter qualifying distributions fro	m Part XII, line 4				8		19,282
If line 8 is equal to or greater tha See the Part VI instructions	n line 7, check the box in Part VI, li	ne 1b, and com	plete that part usi	ng a 1% tax rate.			
123521 12-02-11							Form 990-PF (20

orm 990 Part V	-PF (2011) DEAN AND JUANITA MITCHELL FOUNDATION (I Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), o	<u>4:</u> r 494	2-1 8-	10823 see in:	07 stru		age 4 s)
1a Exer	npt operating foundations described in section 4940(d)(2), check here 🕨 🔲 and enter "N/A" on line 1.						
Date	of ruling or determination letter: (attach copy of letter if necessary-see instructions)						
b Dom	nestic foundations that meet the section 4940(e) requirements in Part V, check here 🕨 📖 and enter 1%		1			32	<u> 25.</u>
of Pa	art I, line 27b		İ				
c All o	ther domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b) \supset		- 1				
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			32	<u> 25.</u>
	title 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			32	<u> 25.</u>
6 Cred	tits/Payments:						
a 201	1 estimated tax payments and 2010 overpayment credited to 2011 6a	_					
b Exer	mpt foreign organizations - tax withheld at source 6b						
c Tax	paid with application for extension of time to file (Form 8868) 6c 32	5.					
d Bacl	kup withholding erroneously withheld						
	al credits and payments. Add lines 6a through 6d		7	<u>.</u>		3:	<u> 25.</u>
	er any penalty for underpayment of estimated tax. Check here if Form 2220 is attached		8				
9 Tax	due. If the total of lines 5 and 8 is more than line 7, enter amount owed	▶ _	9				0.
10 Ove	rpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	▶	10				
	er the amount of line 10 to be: Credited to 2012 estimated tax	<u>> </u>	11				
Part V	/II-A Statements Regarding Activities						
1a Duri	ing the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or inter	rene in		-		Yes	No
-	political campaign?			-	1a		<u>X</u> _
	it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition	•		L	1b		<u>X</u>
If th	ne answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials pub	lished	or	ļ	l		
dıst	inbuted by the foundation in connection with the activities			1			
	the foundation file Form 1120-POL for this year?			Ļ	1c		<u>X</u>
	er the amount (if any) of tax on political expenditures (section 4955) imposed during the year:			ļ	-	l	
		<u>0 .</u>		1			
e Ente	er the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation			-			
	nagers. ▶ \$ 0 .			İ]	
2 Has	the foundation engaged in any activities that have not previously been reported to the IRS?			_	2		<u>X</u>
	Yes," attach a detailed description of the activities						
	the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporati	on, or		-	ĺ		
-	aws, or other similar instruments? If "Yes," attach a conformed copy of the changes				3		<u>X</u>
	the foundation have unrelated business gross income of \$1,000 or more during the year?				4a		X
	'es," has it filed a tax return on Form 990-T for this year?		N	/A	4b		
	s there a liquidation, termination, dissolution, or substantial contraction during the year?			-	5		<u>X</u>
	Yes," attach the statement required by General Instruction T						
	the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:						
	y language in the governing instrument, or						
	y state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the	state la	W				
	emain in the governing instrument?				6	X	
7 Did	the foundation have at least \$5,000 in assets at any time during the year?				7	X	
	Yes, " complete Part II, col (c), and Part XV.						
	er the states to which the foundation reports or with which it is registered (see instructions) 🕨						
<u>I</u>							
b If th	ne answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)						
of e	each state as required by General Instruction G? If "No," attach explanation			ļ	8b_	X	<u></u>
	he foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) fo	calend	dar	ļ			
-	r 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV			1	9		X
10 Did	any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses				10	l	X

Form **990-PF** (2011)

	990-PF(2011) DEAN AND JUANITA MITCHELL FOUNDATION 42-1082	<u> 2307</u>	<u>F</u>	age 5
Pa	rt 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]	<u>X</u>
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		<u>X</u>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	_13	X	
	Website address ► N/A			
14	The books are in care of ► BROOKS LODDEN, P.C. Telephone no. ► 515/2:			
	Located at ► 1441 29TH ST, SUITE 305, WEST DES MOINES, IA ZIP+4 ►50	<u> 1266</u>		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here			
	and enter the amount of tax-exempt interest received or accrued during the year	N	/A	NI
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank,	1	Yes	No
	securities, or other financial account in a foreign country?	16	L	X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign	ļ		
Pa	country Int VII-B Statements Regarding Activities for Which Form 4720 May Be Required	<u> </u>		
<u> </u>	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	T^{-}	Yes	No
1 a	During the year did the foundation (either directly or indirectly):	-	1.00	
	(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?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(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)?		1	
	(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.)		\	,
t	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 instructions)? N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here			
C	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected			
	before the first day of the tax year beginning in 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			1
	defined in section 4942(j)(3) or 4942(j)(5)):			
ŧ	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 , , , , , , , , , , , , , , , , , , ,			
	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		1	
	statement - see instructions) N/A	n h	1	
	the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	2b	+-	
		Ì		
3:	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
	during the year?			
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			
	of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C,			
	Form 4720, to determine if the foundation had excess business holdings in 2011) N/A	3ь		
4:	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	1	X
	b 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?	4b	<u>L</u> .	X
	F	orm 99	0-PF	(2011)

123541 12-02-11

orm 990-PF (2011) DEAN AND JUANITA MITCHEL	L FOUNDATION		<u>42-10823(</u>) 7 Page 6
Part VII-B Statements Regarding Activities for Which I	Form 4/20 May Be F	Required (continu	ued)	
5a During the year did the foundation pay or incur any amount to:		 1		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	· · · ·		s X No	
(2) Influence the outcome of any specific public election (see section 4955); of	or to carry on, directly or indire			1
any voter registration drive?			s X No	1 1
(3) Provide a grant to an individual for travel, study, or other similar purposes	?	Ye	s X No	
(4) Provide a grant to an organization other than a charitable, etc., organization	n described in section			
509(a)(1), (2), or (3), or section 4940(d)(2)?		Ye	s X No	i 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?		☐ Ye	s X No	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify un	der the exceptions described i	n Regulations		, ,
section 53.4945 or in a current notice regarding disaster assistance (see instru	uctions)?		N/A 5	ь
Organizations relying on a current notice regarding disaster assistance check h	nere			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption f	rom the tax because it mainta	ined		
expenditure responsibility for the grant?		/A 🔲 Ye	s No	
If "Yes," attach the statement required by Regulations section 53 494		.,		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to				
a personal benefit contract?	pay promisino on	Ve	s X No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	nersonal henefit contract?			Sb X
If "Yes" to 6b, file Form 8870	ocisonal benefit contract.			- A
7a At any time during the tax year, was the foundation a party to a prohibited tax	shaltar transaction?		s X No	
		1 €	. [,,
b If "Yes," did the foundation receive any proceeds or have any net income attrib Book VIII Information About Officers, Directors, Trust		nagara Highli		'b
Part VIII Paid Employees, and Contractors	ees, Foundation Ma	magers, nigni	,	
List all officers, directors, trustees, foundation managers and their	compensation.			
		(c) Compensation	(d) Contributions to	(e) Expense
(a) Name and address	(b) Title, and average hours per week devoted	(If not paid,	(d) Contributions to employee benefit plans and deferred	(e) Expense account, other allowances
DEAN W. MITCHELL (DECEASED 2011)	to position TRUSTEE	`enter'-0-)´	compensation	allowalices
4210 HICKMAN RD, #255	TYOPIEE			
·	1 000		ا ۾ ا	0
	0.00	0.	0.	0.
DIANE KAE BREWER	TRUSTEE			
6405 LA MANGA DRIVE	0.00			•
DALLAS, TX 752482941	0.00	0.	0.	0.
DAVID C. CRAIG	TRUSTEE			
2905 SYLVANIA DR				
WEST DES MOINES, IA 50266	0.00	0.	0.	0.
]		
2 Compensation of five highest-paid employees (other than those in		enter "NONE."	(d) Cookshukanaka	
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week	(c) Compensation	(d) Contributions to employee benefit plans	(e) Expense account, other
	devoted to position	(c) componication	and deterred compensation	allowances
NONE				
	<u> </u>			
	1			
Total number of other employees paid over \$50,000		-1,	>	0
The state of the s				

Form **990-PF** (2011)

Form 990-PF (2011) DEAN AND JUANITA MITCHELL FOUNDATION 4:	2-10	82307 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)		
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		
		j
Total number of others receiving over \$50,000 for professional services		<u>▶</u> 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 MAKE CONTRIBUTIONS TO PRESELECTED QUALIFIED 501(C)(3)		
CHARITABLE ORGANIZATIONS. CONTRIBUTIONS TO ONLY ONE DURING		
THE YEAR.		19,282.
2		
3		
4		
Dow IV Place CD D Lt II		
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2		Amount
		Amount
1 <u>N/A</u>	—	
2		
	\neg	
All other program-related investments. See instructions.		
3		
Total, Add lines 1 through 3	ightharpoonup	0.
		Form 990-PF (2011)

P	Art X Minimum Investment Return (All domestic foundations must complete this part Foreign four	ndations, se	e 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	350,019.
b	Average of monthly cash balances	1b	
c	Fair market value of all other assets	10	
ď	Total (add lines 1a, b, and c)	1d	350,019.
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	350,019.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	5,250.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	344,769.
6	Minimum investment return. Enter 5% of line 5	6	17,238.
_	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.)	nd certain	
1	Minimum investment return from Part X, line 6	1	17,238.
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	2 <u>c</u>	325.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	16,913.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	16,913.
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	16,913.
P	art XII Qualifying Distributions (see instructions)		· · · · · · · · · · · · · · · · · · ·
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	19,282.
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	
3	Amounts set aside for specific charitable projects that satisfy the:		
а	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	19,282.
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	0.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	19,282.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation	qualifies for t	

Form **990-PF** (2011)

4940(e) reduction of tax in those years.

Part'XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2010	(¢) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI,			-	
line 7				16,913.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			0.	
b Total for prior years:				
,,		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006 872.				
b From 2007 3,640.			'	
c From 2008 6,382.				
d From 2009 8,635.				
e From 2010 4,146.				
f Total of lines 3a through e	<u>23,675.</u>			
4 Qualifying distributions for 2011 from				
Part XII, line 4: ▶ \$ 19,282.				
a Applied to 2010, but not more than line 2a			0.	
b Applied to undistributed income of prior				
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus	_			
(Election required - see instructions)	0.			·
d Applied to 2011 distributable amount				16,913.
e Remaining amount distributed out of corpus	2,369.			
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount	0.			0.
must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	26,044.			
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			<u></u>	0.
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	872.			<u> </u>
9 Excess distributions carryover to 2012.				
Subtract lines 7 and 8 from line 6a	25,172.	· · · · · · · · · · · · · · · · · · ·		<u> </u>
10 Analysis of line 9:				
a Excess from 2007 3, 640.				
b Excess from 2008 6,382.				
c Excess from 2009 8 , 6 3 5 .				
d Excess from 2010 4,146.				
e Excess from 2011 2,369.				Form 990-PF (2011)

	irt XIV Private Operating Fo	D JUANITA M			42-10	82307 Page 10
	If the foundation has received a ruling or			rA, question 9)	N/A	
ı a	foundation, and the ruling is effective for		· · · · · · · · · · · · · · · · · · ·			
h	Check box to indicate whether the found	•	•	un contion	4040(1)(2) 05	40(4)(5)
	Enter the lesser of the adjusted net	Tax year	ig louridation described	Prior 3 years	4942(j)(3) or49	42(j)(5)
~ a	income from Part I or the minimum	(a) 2011	(b) 2010	(c) 2009	(d) 2008	(e) Total
	investment return from Part X for	(4) 2011	(5) 20 10	(0) 2000	(4) 2000	- (c) total
	each year listed					
	85% of line 2a		. ,			
_	Qualifying distributions from Part XII,					
·	line 4 for each year listed					
	Amounts included in line 2c not		· · · · · · · · · · · · · · · · · · ·	 -		
	used directly for active conduct of					
	exempt activities					
	Qualifying distributions made directly			 		
٠	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)					
t	"Endowment" alternative test - enter					
	2/3 of minimum investment return shown in Part X, line 6 for each year listed					
	"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					11
	section 4942(j)(3)(B)(III)					
	(3) Largest amount of support from					
	an exempt organization					
	(4) Gross investment income					
Pa	art XV Supplementary Info			if the foundation	n had \$5,000 or mo	ore in assets
	at any time during t	he year-see instr	ructions.)	···		
1	Information Regarding Foundation	-				
í	List any managers of the foundation wh year (but only if they have contributed n			tributions received by th	e foundation before the clo	se of any tax
		ECEASED 201				
1	List any managers of the foundation who other entity) of which the foundation has	o own 10% or more of th s a 10% or greater interes	e stock of a corporation st.	(or an equally large port	ion of the ownership of a p	artnership or
<u>NC</u>	NE					
2	Information Regarding Contributi					
	Check here 🕨 🗓 if the foundation o	only makes contributions '	to preselected charitable	organizations and does	not accept unsolicited requ	ests for funds. If
	the foundation makes gifts, grants, etc	(see instructions) to indiv	viduals or organizations	under other conditions, o	complete items 2a, b, c, and	d d.
	a The name, address, and telephone num	ber of the person to whor	m applications should be	e addressed:		
	b The form in which applications should b	e submitted and informa	tion and materials they s	should include:		
	Any submission deadlines:					
	d Any restrictions or limitations on award	s, such as by geographic	al areas, charitable fields	, kinds of institutions, or	other factors:	
105	201 10 20 11				-	- 000 DE

3 Grants and Contributions Paid During t		Payment		
Recipient	If recipient is an individual,	Foundation	Purpose of grant or	····
Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	status of recipient	Purpose of grant or contribution	Amount
a Paid dunng the year		· · · · · · · · · · · · · · · · · · ·		
NEW HOPE VILLAGE FOUNDATION	NONE	PUBLIC	AIDING & ASSISTING	
1211 E 18TH ST			RETARDED CITIZENS	
CARROLL, IA 51401				19,282.
		-		
Total			▶ 3a	19,282.
b Approved for future payment				
NONE				
		-	_	
Total			▶ 3b	000 DE (2014)

Part XVI-A	Analysis of Income-Producing Activities

		d business income		by section 512, 513, or 514	(e)
1 Program service revenue:	(a) Business code	(b) Amount	(C) Exclu- sion code	(d) Amount	Related or exempt function income
a					
b					
c	_		ļ		
d					
e	_		 	-	
f			1		
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
investments			1 4	45 542	
4 Dividends and interest from securities			14	17,713.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property			-		
b Not debt-financed property			1		
6 Net rental income or (loss) from personal					
property 7. Other research second			 -		
7 Other investment income	-		+ +		
8 Gain or (loss) from sales of assets other			1.0	202	
than inventory			18	392.	
9 Net income or (loss) from special events			-		
O Gross profit or (loss) from sales of inventory Other revenue.	-		+ +		
a b		 			
	1		 -		
	1 1		 		
de					
12 Subtotal. Add columns (b), (d), and (e)		0 .	 	18,105.	0
13 Total. Add line 12, columns (b), (d), and (e)			 		18,105
(See worksheet in line 13 instructions to verify calculations	s.)			···	
Part XVI-B Relationship of Activitie		omnlishment of E	vemnt E	Purnoces	
Talt AVI-B Netationship of Activities		mphaiment of L	vembr i		
	income is reported				plishment of
Line No. Explain below how each activity for which					F
Line No. Explain below how each activity for which the foundation's exempt purposes (other t		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			
		nds for such purposes).			

Part X		mation Re npt Organi		sfers To a	nd Transactions a	and Relationsh	ips With None	charitable	;	
1 Did th				of the following	with any other organization	on described in section	un 501/c) of		Yes	No
		-			, relating to political organ		11 30 1(0) 01			-110
	-		ition to a noncharitab		· · · · · · · · ·	iizations.			.	
(1)		oporting loanua	anon to a nononarnac	no exempt or g	amzanon on			1a(1)	1	X
	Other assets							1a(1)		X
• •	r transactions:							10(2)		
		to a noncharital	ole exempt organizati	ion				1b(1)		X
			ncharitable exempt o					1b(2)		X
		es, equipment, (•	gamzanon				1b(3)		X
, ,	Reimbursement		or other assets					1b(4)	\vdash	X
` '	Loans or loan g	ŭ						1b(5)		X
			mbership or fundrais	una solicitation	19			1b(6)		X
			iling lists, other asset					1c	\vdash	X
	-				iule. Column (b) should al	wave show the fair m	arket value of the no	<u> </u>	L	
					d less than fair market vali	-	_		,013,	
	•	• •	other assets, or servi		a 1000 that law market vale	ao in any a anoaoaon	or onaring arrangem	10112, 011014 111		
(a) Line no		nt involved			exempt organization	(d) Description	of transfers, transaction	s. and sharing ar	rangeme	
<u> </u>	1			N/A				-1		
										
										
	-									
	_									
	 									
										
	 			· · · · · · ·						
	 	•								
	 									
	†			·						
										
					- ·		- ·			
					<u></u>					
ın se	ection 501(c) of	the Code (othe	r than section 501(c)		or more tax-exempt organ on 527?	iizations described		Yes	X	No.
b If "Yo		ne following sch								
		(a) Name of org	ganization	<u></u>	(b) Type of organization	 	(c) Description of rel	ationship		
		N/A				ļ				
						<u> </u>				
						<u> </u>				
			 			<u> </u>				
Sign					g accompanying schedules and n taxpayer) is based on all infor			May the IRS return with the	he prepa	arer
Here)("""	100 B	100112	1 10-15-12	TRUSTE	EE.	shown below		No No
	<i>y</i>	officer or trustee	Harry	- 1/Ama	Date	Title	!			
	_	pe preparer's n		Preparer's si		Date	Check If	PTIN		
					./ /		self- employed			
Paid	BRII	CE W. H	ARTLEY	1/2mm	w Hartle	6-11-12		P00075	315°	7
Prepa			OKS LODDE	N, P.C	. 7	-	Firm's EIN ▶ 4			-
Use C		11(0		, _ • •			, , , , , , , , , , , , , , , , , , ,		-00	
	·	ddress ▶ 14	41 29TH S	TREET	STE. 305					
					IA 50266-13!	57	Phone no. 5:	15/223-	-73(3 O
						<u>- </u>	17 HONO 110. J.	Form 99		
										_~ · · /

FORM 990-PF DIVIDEND	S AND	INTERI	EST FROM	SECUR	RITIES	STATEMENT	1
SOURCE		GROSS	AMOUNT		TAL GAINS	COLUMN (A) AMOUNT	
SMITH BARNEY - DIVIDENDS SMITH BARNEY - INTEREST	13,614. 4,099.		0.		13,614. 4,099.		
TOTAL TO FM 990-PF, PART I, I		17,713.	0.		17,713.		
FORM 990-PF	AC	COUNTI	NG FEES			STATEMENT	2
DESCRIPTION	EXPE	A) NSES BOOKS	(B) NET INV MENT IN		(C) ADJUSTED NET INCOM		
TAX PREPARATION & ACCOUNTING SERVICES		1,620.	1	,620.			0.
TO FORM 990-PF, PG 1, LN 16B		1,620.	1	,620.			0.
FORM 990-PF		TAX	ES			STATEMENT	3
DESCRIPTION	EXPE	A) INSES BOOKS	(B) NET INV MENT IN		(C) ADJUSTED NET INCOM		
PRIOR YEAR FINAL		242.	2. 2				0.
TO FORM 990-PF, PG 1, LN 18		242.		242.			0.
ORM 990-PF CORPORATE STOCK					STATEMENT	4	
DESCRIPTION				ВО	OK VALUE	FAIR MARKE	T
KAYNE ANDERSON MLP INVT CO. ALPINE TOTAL DYNAMIC DIVIDEND FUND WACHOVIA PFD FUNDING PRINCIPAL FINANCIAL GROUP					36,847. 43,752. 39,072.	66,6 9,6 56,8	21. 04.
					29,707.	62,9	25.

FORM 990-PF COR	CORPORATE BONDS			5
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE	
MERCK & CO INC. BONDS	-	24,430. 27,		
TOTAL TO FORM 990-PF, PART II, LINE	24,430.	27,915.		
FORM 990-PF OTHE	R INVESTMENTS		STATEMENT	6
	VALUATION		FAIR MARKE	т
DESCRIPTION	METHOD	BOOK VALUE	VALUE	
DESCRIPTION NUVEEN DIVERSIFIED DIV & INC FD	METHOD	BOOK VALUE 19,047.	VALUE 13,8	

Form **8868**

(Rev. January 2012)

Department of the Treasury

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

Italiai Reveilde Seivice	Frite a Separate appi	ication for each return.		<u> </u>		
If you are filing for an Automatic 3-Month					▶ X	
If you are filing for an Additional (Not Auto						
o not complete Part II unless you have al						
llectronic filing (e-file). You can electronica			•		•	
equired to file Form 990 T), or an additional						
f time to file any of the forms listed in Part I						
ersonal Benefit Contracts, which must be s	ent to the IRS in paper format	(see instructions). For more details	s on the elec	tronic filing o	f this form,	
isit www.irs gov/efile and click on e-file for C					·-	
Part I Automatic 3-Month Ex	ctension of Time. Only s	submit original (no copies n	eeded).			
corporation required to file Form 990-T and	I requesting an automatic 6-mo	onth extension - check this box an	d complete			
art I only						
Il other corporations (including 1120-C filers	s), partnerships, REMICs, and ti	rusts must use Form 7004 to requ	est an extens	sion of time		
o file income tax returns.					·	
ype or Name of exempt organization or	other filer, see instructions		Employer	Employer identification number (EIN		
rint						
DEAN AND JUANITA	MITCHELL FOUND	ATION	X	X 42-1082307		
le by the use date for Number, street, and room or suit	e no If a P O. box, see instruct	tions.	Social sec	curity numbe	r (SSN)	
turn See C/O BROOKS LODDE	<u>N, 1441 29TH STI</u>	REET, NO. 305				
structions City, town or post office, state, a	nd ZIP code For a foreign add	ress, see instructions.				
WEST DES MOINES,	IA 50266					
nter the Return code for the return that this	application is for (file a separa	te application for each return)			0 4	
		,	·		<u> </u>	
pplication	Return	Application			Return	
For	Code	Is For			Code	
orm 990	01	Form 990-T (corporation)				
orm 990-BL	02	Form 1041-A				
orm 990-EZ	01	Form 4720	08			
orm 990-PF	04	Form 5227				
form 990-T (sec 401(a) or 408(a) trust)	05	Form 6069			10 11	
Form 990-T (trust other than above)	06	Form 8870			12	
	KS LODDEN, P.C.	10/11/00/0			112	
The books are in the care of > 1441		305 - WEST DES M	OTNES	TA 501	266	
Telephone No. ► 515/223-730		FAX No 🔊	CTIATO,	TH 302	100	
If the organization does not have an office		·			. []	
If this is for a Group Return, enter the org			If this is fo	tha whala a		
ox Fig. 18 If it is for part of the group, cl	sock this box	ash a list with the names and FINe	. II UIIS IS IO	uie wilole gi	oup, check this	
				ers the exten	SION IS TOT	
	•	•		The auto	_	
	, to the the exempt organiza	tion return for the organization na	meu above.	me extensio	11	
is for the organization's return for ► X calendar year 2011 or						
tax year beginning	, an	nd ending		_		
		<u></u>	¬			
2 If the tax year entered in line 1 is for le	ss than 12 months, check reas	son Initial return	_ Fınal retur	n		
Change in accounting period						
						
3a If this application is for Form 990-BL, 9	990-PF, 990-T, 4720, or 6069, e	enter the tentative tax, less any				
nonrefundable credits. See instruction			3a_	\$	325	
b If this application is for Form 990-PF, 9	190-T, 4720, or 6069, enter any	refundable credits and				
estimated tax payments made Includ	any prior year overpayment a	llowed as a credit	3b_	\$	0.	
c Balance due. Subtract line 3b from lin	e 3a Include your payment wi	th this form, if required,				
by using EFTPS (Electronic Federal Ta	x Payment System) See instru	ictions	3c	\$	325	
Caution. If you are going to make an electro	nic fund withdrawal with this F	orm 8868, see Form 8453-EO and	Form 8879-	EO for payme	ent instructions	
.HA For Privacy Act and Paperwork Re					868 (Rev 1-2012	
					•	
00044						

01-04-12

Form **8868**

(Rev. January 2012)

Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

File a separate application for each return.

OMB No. 1545-1709

If you are filing for an Automatic 3-Month Extension, complete only Part I and check this box							
If you are filing for an Additional (No		-		his form)	• •		
Do not complete Part II unless you h	ave already been granted a	n automa	tic 3-month extension on a previous	ly filed For	m 8868		
Electronic filing (e-file). You can elec			·	•		oration	
equired to file Form 990-T), or an addr					•		
of time to file any of the forms listed in							
Personal Benefit Contracts, which mus							
visit www irs gov/efile and click on e-fil		or rommar	(eee mendenene) i er mere detalle e	71 the 6100	trorne ming or this	10111,	
		. Only s	ubmit original (no copies nee	eded).			
A corporation required to file Form 990							
Part I only	J			, , , , , , , , , , , , , , , , , , ,	_	• 🗂	
All other corporations (including 1120- o file income tax returns	C filers), partnerships, REMi	Cs, and ti	rusts must use Form 7004 to reques	t an exten	sion of time		
DEAN AND JUAN	DEAN AND JUANITA MITCHELL FOUNDATION X 42-10823						
iling your CO BROOKS TO	or suite no. If a P.O. box, se DDEN, 1441 291			Social sec	curity number (SSI	N)	
City, town or post office, s	tate, and ZIP code. For a fo				· 1.		
WEST DES MOIN	ES, IA 50266		·		-		
Enter the Return code for the return th	at this application is for file	a coporo	to application for each return)			0 4	
Lines the Netam code for the return to	at this application is for tille	a separa	te application for each return)		•	0 4	
Application		Return	Application		-	Return	
s For		Code	Is For			Code	
Form 990		01	Form 990-T (corporation)	07			
Form 990-BL		02	Form 1041-A	08			
Form 990-EZ		01		form 4720			
Form 990-PF	<u>-</u>	04	Form 5227			10	
Form 990-T (sec. 401(a) or 408(a) trust	1	05	Form 6069			11	
Form 990-T (trust other than above)		06	Form 8870				
	ROOKS LODDEN,		FOIII 8070			12	
• The books are in the care of $\triangleright 1$	-		305 - WEST DES MO	TNEC	TA 50266		
Telephone No. ► 515/223-		70111	FAX No ►	THEST	IA 30200		
If the organization does not have a		un tha Lir					
 If this is for a Group Return, enter the 			•	lf this is fo	r tha whala arewa	obook the	
	oup, check this box	1					
			ach a list with the names and EINs or to file Form 990-T) extension of time		ers the extension i	s tor	
1 I request an automatic 3-month AUGUST 15, 201	` <u>_</u>	-	· ·		T		
is for the organization's return for		t organiza	tion return for the organization name	ed above.	The extension		
► X calendar year 2011 c							
, <u></u>							
tax year beginning		, ar	ia enaing	 -	- -		
2 If the tax year entered in line 1 is Change in accounting per	•	heck reas	on Initial return	Fınal retur	n		
On If this application is for Farm 00:	D DL 000 DE 000 T 4700		inter the tentative to the control				
• •							
nonrefundable credits. See insti	3a	\$	325.				
b If this application is for Form 99			^				
estimated tax payments made.		_		3b	\$	0.	
c Balance due. Subtract line 3b f		-	•			205	
by using EFTPS (Electronic Fed				3c		325.	
Caution. If you are going to make an				orm 8879-			
LHA For Privacy Act and Paperwe	ork Reduction Act Notice,	see instr	uctions.		Form 8868 (I	Rev 1-2012)	