Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0052

2011

For calendar year 2011 or tax year beginning , 2011, and ending , 20

Name of foundation: JOHN & CATHERINE SHULER CHARITABLE TRUST (23-37498)

A Employer identification number: 42-6076704

Number and street (or P O box number if mail is not delivered to street address): PO BOX 803878

Room/suite:

B Telephone number (see instructions): (312)630-6000

City or town, state, and ZIP code: CHICAGO, IL 60680

C If exemption application is pending check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

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

H Check type of organization ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)* ▶ $ 712,134.00

J Accounting method ☒ Cash ☐ Accrual
☐ Other (specify)
(Part I, column (d) must be on cash basis)

SCANNED AUG 15 2012

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))*

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	23,359.00	23,359.00		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	8,563.00			
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		8,563.00		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 **Total.** Add lines 1 through 11	31,922.00	31,922.00		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	650.00	650.00		
	c Other professional fees (attach schedule)	3,250.00	3,250.00		
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	318.00	318.00		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	183.00	183.00		
	24 **Total operating and administrative expenses.** Add lines 13 through 23	4,401.00	4,401.00		
	25 Contributions, gifts, grants paid	40,500.00			40,500.00
	26 Total expenses and disbursements Add lines 24 and 25	44,901.00	4,401.00		40,500.00
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-12,979.00			
	b **Net investment income** (if negative, enter -0-)		27,521.00		
	c **Adjusted net income** (if negative, enter -0-)				

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For Paperwork Reduction Act Notice, see instructions.

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JSA

Part II Balance Sheets

		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1	Cash - non-interest-bearing	20,614.00	9,697.00	9,697.00
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶			
		Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10 a	Investments - U S and state government obligations (attach schedule)	30,807.00	31,159.00	32,599.00
	b	Investments - corporate stock (attach schedule)	297,866.00	313,731.00	362,283.00
	c	Investments - corporate bonds (attach schedule)	227,543.00	231,726.00	249,192.00
	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	12	Investments - mortgage loans			
	13	Investments - other (attach schedule)	15,713.00	15,713.00	20,365.00
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)	48,088.00	26,797.00	37,998.00
	16	**Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	640,631.00	628,823.00	712,134.00
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 ▶)			
	23	**Total liabilities** (add lines 17 through 22)			
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ 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 and complete lines 27 through 31. ▶ ☒			
	27	Capital stock, trust principal, or current funds	640,631.00	628,823.00	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see instructions)	640,631.00	628,823.00	
	31	**Total liabilities and net assets/fund balances** (see instructions)	640,631.00	628,823.00	

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	640,631.00
2	Enter amount from Part I, line 27a	2	-12,979.00
3	Other increases not included in line 2 (itemize) ▶	3	1,171.00
4	Add lines 1, 2, and 3	4	628,823.00
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	628,823.00

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	LONG TERM CAP GAIN DIVIDENDS			
b	SHORT TERM CAPITAL LOSSES - SEE ATTACHED			
c	LONG TERM CAPITAL GAINS - SEE ATTACHED			
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	378.00			378.00
b	9,275.00		12,691.00	-3,416.00
c	91,798.00		80,197.00	11,601.00
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				378.00
b				-3,416.00
c				11,601.00
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	8,563.00
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 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 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	32,178.00	706,983.00	0.0455
2009	37,622.00	657,630.00	0.0572
2008	41,207.00	761,027.00	0.0541
2007	39,821.00	859,574.00	0.0463
2006	38,752.00	810,896.00	0.0478

2	**Total** of line 1, column (d)	2	0.2509
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	0.0502
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	739,854.18
5	Multiply line 4 by line 3	5	37,140.68
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	275.21
7	Add lines 5 and 6	7	37,415.89
8	Enter qualifying distributions from Part XII, line 4	8	40,500.00

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 . . . Date of ruling or determination letter _______________ **(attach copy of letter if necessary - see instructions)**				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☒ and enter 1% of Part I, line 27b			1	275.00
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	
3	Add lines 1 and 2			3	275.00
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-			5	275.00
6	Credits/Payments				
a	2011 estimated tax payments and 2010 overpayment credited to 2011	6a			
b	Exempt foreign organizations - tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c	300.00		
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments Add lines 6a through 6d			7	300.00
8	Enter 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	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	25.00
11	Enter the amount of line 10 to be **Credited to 2012 estimated tax** ▶ 25.00 **Refunded** ▶			11	

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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶$ ____________ **(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? *If "Yes," attach a detailed description of the activities*	2		X
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? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		X
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?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ FLORIDA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b		X
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

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 instructions)	**11**		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	**12**		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	**13**	X	

Website address ▶

14 The books are in care of ▶ THE NORTHERN TRUST COMPANY Telephone no ▶ (312) 630-6000

Located at ▶ PO BOX 803878, CHICAGO, IL ZIP + 4 ▶ 60680

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ **15**

		Yes	No
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?	**16**		X
See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes," enter the name of the foreign country ▶			

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? ☐ **Yes** ☒ **No**			
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ **Yes** ☒ **No**			
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ **Yes** ☒ **No**			
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ **Yes** ☒ **No**			
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ **Yes** ☒ **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) ☐ **Yes** ☒ **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 instructions)?	**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**		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))			
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? ☐ **Yes** ☒ **No**			
If "Yes," list the years ▶ , , ,			
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 instructions)	**2b**		X
c If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ , , ,			
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ **Yes** ☒ **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? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011)*	**3b**		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	**4a**		X
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**		X

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(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 instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

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 instructions)? **5b**

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53 4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b**

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **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 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
GIVEN CHASE 14324 WEST THORNE ;LANE	CO-TRUSTEE	0.00	0.00	0.00
LAKEWOOD, WA 98498				

2 Compensation of five highest-paid employees (other than those included on line 1 - see 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 ▶ NONE

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 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 . . . ▶		

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 NONE	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2	
All other program-related investments See instructions 3 NONE	
Total. Add lines 1 through 3 . . . ▶	

Part X Minimum Investment Return (All domestic foundations must complete this part Foreign foundations, see 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	724,818.00
b	Average of monthly cash balances			1b	26,303.00
c	Fair market value of all other assets (see instructions)			1c	
d	**Total** (add lines 1a, b, and c)			1d	751,121.00
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e			
2	Acquisition indebtedness applicable to line 1 assets			2	
3	Subtract line 2 from line 1d			3	751,121.00
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)			4	11,266.82
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4			5	739,854.18
6	**Minimum investment return.** Enter 5% of line 5			6	36,992.71

Part XI Distributable Amount (see 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	36,992.71
2a	Tax on investment income for 2011 from Part VI, line 5	2a	275.00		
b	Income tax for 2011 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	275.00
3	Distributable amount before adjustments Subtract line 2c from line 1			3	36,717.71
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	36,717.71
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	36,717.71

Part XII Qualifying Distributions (see 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	40,500.00
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	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	40,500.00
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 instructions)	5	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	40,500.00

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 instructions)

		(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7					36,717.71
2 Undistributed income, if any, as of the end of 2011					
a Enter amount for 2010 only					
b Total for prior years 20_____,20_____,20_____					
3 Excess distributions carryover, if any, to 2011					
a From 2006					
b From 2007					
c From 2008					
d From 2009					
e From 2010					
f **Total** of lines 3a through e					
4 Qualifying distributions for 2011 from Part XII, line 4 ▶ $ 40,500.00					
a Applied to 2010, but not more than line 2a					
b Applied to undistributed income of prior years (Election required - see instructions)					
c Treated as distributions out of corpus (Election required - see instructions)					
d Applied to 2011 distributable amount					
e Remaining amount distributed out of corpus					
5 Excess distributions carryover applied to 2011 *(If an amount appears in column (d), the same amount 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					
b Prior years' undistributed income Subtract line 4b from line 2b					
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					
d Subtract line 6c from line 6b Taxable amount - see instructions					
e Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount - see instructions					
f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012					36,717.71
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)					
8 Excess distributions carryover from 2006 not applied on line 5 or line 7 (see instructions)					
9 **Excess distributions carryover to 2012.** Subtract lines 7 and 8 from line 6a					
10 Analysis of line 9					
a Excess from 2007					
b Excess from 2008					
c Excess from 2009					
d Excess from 2010					
e Excess from 2011					

Part XIV Private Operating Foundations (see 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 foundation 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 foundation had $5,000 or more in assets at any time during the year - see 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))

N/A

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

N/A

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 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

N/A

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

N/A

c Any submission deadlines

N/A

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

N/A

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	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
a *Paid during the year*				
SEE ATTACHED				40,500.00
Total . . . . ▶ **3a**				40,500.00
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	23,359.00	
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 property .					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	8,563.00	
9 Net income or (loss) from special events . . .					
10 Gross profit or (loss) from sales of inventory . .					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				31,922.00	

13 **Total.** Add line 12, columns (b), (d), and (e) 13 31,922.00

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
	N/A

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

			Yes	No
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 (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(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 (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

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) is based on all information of which preparer has any knowledge

▶ 8/9/12 ▶ TRUSTEE

Signature of officer or trustee Date Title

May the IRS discuss this return with the preparer shown below (see instructions)? ☒ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name ALBERT C RAWSON III	Preparer's signature	Date 08/07/2012	Check ☒ if self-employed	PTIN
Firm's name ▶ ALBERT C RAWSON III, CPA			Firm's EIN ▶ 59-2118251	
Firm's address ▶ 808-A NW 16TH AVENUE GAINESVILLE, FL 32601			Phone no 352-375-6608	

42-6076704
JOHN & CATHERINE SHULER CHARITABLE TRUST
Supplemental Schedules
2011

Page 1, Part 1 – Analysis of Revenues & Expenses

Line 16b – Accounting Fees

Tax Preparation Fee $ 650

Line 16c – Other Professional Fees

Trustee Fees $ 3,250

Line 18 – Taxes

Foreign Taxes $ 318

Line 23 – Other Expenses

Other Transaction Expenses $ 183

Page 2, Part - Analysis of Change In Fund Balance

Line 3 – Other Increases

Timing Differences-Tax/Book $ 1,171

Part VII – A – Statements Regarding Activities

Question 8(b) No, because the Attorney General does not require A copy of the Foundation's 990-PF.

Portfolio Summary

	Market Value	Change From Prior Period	Cost	Unrealized Gain/Loss	Estimated Annual Income	Yield	% of Assets
Equity Securities							
Large Cap	$ 202,464.69	$ 19,436.70	$ 163,492.79	$ 38,757.48	$ 3,830.49	1.9%	28.4%
Mid Cap	23,506.49	2,389.57	20,650.32	2,856.17	238.22	1.0%	3.3%
Small Cap	19,849.03	2,505.45	18,712.00	1,137.03	145.95	0.7%	2.8%
International Developed	68,622.26	1,283.17	70,225.29	(1,603.03)	1,374.50	2.0%	9.6%
International Emerging	47,840.12	1,872.41	40,651.09	7,189.03	720.88	1.5%	6.7%
Total Equity Securities	**$ 362,282.59**	**$ 27,487.30**	**$ 313,731.49**	**$ 48,336.68**	**$ 6,310.04**	**1.7%**	**50.9%**
Fixed Income Securities							
Corporate/Government	249,191.72	3,731.16	231,726.04	17,267.90	12,219.57	4.9%	35.0%
Inflation-Linked	32,599.23	103.99	31,158.55	1,004.40	944.42	2.9%	4.6%
Total Fixed Income Securities	**$ 281,790.95**	**$ 3,835.15**	**$ 262,884.59**	**$ 18,272.30**	**$ 13,163.99**	**4.7%**	**39.6%**
Real Estate							
Real Estate Funds	20,365.19	1,264.23	15,713.28	4,651.91	447.98	2.2%	2.9%
Total Real Estate	**$ 20,365.19**	**$ 1,264.23**	**$ 15,713.28**	**$ 4,651.91**	**$ 447.98**	**2.2%**	**2.9%**
Commodities							
Commodities	37,997.50	($ 13,519.57)	26,796.54	11,200.96	0.00	0.0%	5.3%
Total Commodities	**$ 37,997.50**	**($ 13,519.57)**	**$ 26,796.54**	**$ 11,200.96**	**$ 0.00**	**0.0%**	**5.3%**
Cash and Short Term Investments							
Cash	9,697.27	($ 21,385.92)	9,697.14	0.00	0.97	0.0%	1.4%

Continued on next page.

2011 Tax Information Statement

Account Number: 23-37498
Recipient's Tax ID Number: XX-XXX6704
Payer's Federal ID Number: 36-7158276
Questions? (941)486-4808

☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
SHULER CHARITABLE TRUST J & C
C/O ALBERT C RAWSON III, CPA
808A NW 16TH AVENUE
GAINESVILLE, FL 32601-4012

Payer's Name and Address:
THE NORTHERN TRUST COMPANY
P.O. BOX 803878
CHICAGO, IL 60680

2011 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is Sales Price less commissions and option premiums.

Cusip Number		Description	Date of Sale	Date of Acquisition	Sales Price of Stocks Bonds, etc.	Cost or Other Basis	Net Gain or Loss	Federal Income Tax Withheld
Covered *(Box 6 is not checked)*		*(Box 9)*	*(Box 1a)*	*(Box 1b)*	*(Box 2)*	*(Box 3)*		*(Box 4)*
Short Term Sales Reported on 1099-B								
704326107	60.0000	PAYCHEX INC	08/29/2011	Various	1,578.89	2,014.13	-435.24	0.00
48203R104	50.0000	JUNIPER NETWORKS INC	09/22/2011	Various	949.32	2,064.29	-1,114.97	0.00
Total Short Term Sales Reported on 1099-B **Report on Form 8949, Part I, with Box A checked**					**2,528.21**	**4,078.42**	**-1,550.21**	**0.00**

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. The taxpayer is ultimately responsible for the accuracy of their own tax return.

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2011 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is Sales Price less commissions and option premiums.
For noncovered securites shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the Internal Revenue Service.

Cusip Number		Description	Date of Sale	Date of Acquisition	Sales Price of Stocks Bonds, etc.	Cost or Other Basis	Net Gain or Loss	Federal Income Tax Withheld
Noncovered *(Box 6 is checked)*		*(Box 9)*	*(Box 1a)*		*(Box 2)*			*(Box 4)*
Short Term Sales Reported on 1099-B								
194162103	25.0000	COLGATE PALMOLIVE CO	02/03/2011	02/04/2010	1,902.60	2,003.62	-101.02	0.00
084670702	25.0000	BERKSHIRE HATHAWAY INC-CL B	07/06/2011	08/05/2010	1,909.50	2,016.75	-107.25	0.00
291011104	10.0000	EMERSON ELECTRIC CO	08/10/2011	12/28/2010	428.98	572.20	-143.22	0.00
85590A401	35.0000	STARWOOD HOTELS & RESORTS	08/10/2011	Various	1,508.56	2,129.62	-621.06	0.00
48203R104	28.0000	JUNIPER NETWORKS INC	09/22/2011	12/28/2010	531.62	1,037.12	-505.50	0.00
48203R104	22.0000	JUNIPER NETWORKS INC	09/23/2011	12/28/2010	420.49	814.88	-394.39	0.00
78463V107	.0000	MFC SPDR GOLD TR GOLD SHS	12/31/2011	02/05/2010	6.89	5.38	1.51	0.00
78463V107	.0000	MFC SPDR GOLD TR GOLD SHS	12/31/2011	02/16/2010	5.51	4.54	0.97	0.00
78463V107	.0000	MFC SPDR GOLD TR GOLD SHS	12/31/2011	05/07/2010	17.62	15.15	2.47	0.00
78463V107	.0000	MFC SPDR GOLD TR GOLD SHS	12/31/2011	12/28/2010	14.95	13.33	1.62	0.00
Total Short Term Sales Reported on 1099-B **Report on Form 8949, Part I, with Box B checked**					**6,746.72**	**8,612.59**	**-1,865.87**	**0.00**
Long Term 15% Sales Reported on 1099-B								
808513105	100.0000	CHARLES SCHWAB CORP NEW	01/03/2011	Various	1,731.98	1,875.05	-143.08	0.00

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Cusip Number		Description	Date of Sale	Date of Acquisition	Sales Price of Stocks Bonds, etc.	Cost or Other Basis	Net Gain or Loss	Federal Income Tax Withheld
Noncovered *(Box 6 is checked)*		*(Box 9)*	*(Box 1a)*		*(Box 2)*			*(Box 4)*
665162582	1687.1100	MFB NORTHN FUNDS EMERGING MKTS EQTY EQTY INDEX FD	02/10/2011	Various	20,549.00	16,933.27	3,615.73	0.00
881624209	40.0000	TEVA PHARMACEUTICALS INDS LTD ADR	02/28/2011	Various	1,999.65	1,707.49	292.16	0.00
021441100	25.0000	ALTERA CORP	03/08/2011	04/02/2009	1,085.05	444.90	640.15	0.00
713448108	40.0000	PEPSICO INC	03/08/2011	05/17/2005	2,544.27	2,252.40	291.87	0.00
31428X106	10.0000	FEDEX CORP	03/25/2011	12/08/2009	905.19	899.55	5.64	0.00
31428X106	25.0000	FEDEX CORP	03/28/2011	01/12/2010	2,296.10	2,164.95	131.15	0.00
17275R102	135.0000	CISCO SYS INC	04/11/2011	02/24/1998	2,358.99	1,480.78	878.21	0.00
654106103	11.0000	NIKE INC CLASS B	04/26/2011	Various	879.61	706.54	173.07	0.00
654106103	9.0000	NIKE INC CLASS B	04/27/2011	12/08/2009	721.99	574.38	147.61	0.00
594918104	125.0000	MICROSOFT CORP COM	05/23/2011	02/24/1998	3,014.69	2,609.37	405.32	0.00
548661107	75.0000	LOWES COMPANIES INC	06/24/2011	04/27/2010	1,739.58	2,082.60	-343.02	0.00
58405U102	50.0000	MEDCO HEALTH SOLUTIONS INC	06/24/2011	03/05/2008	2,684.11	2,145.50	538.61	0.00
254687106	40.0000	WALT DISNEY CO	07/15/2011	Various	1,572.24	1,332.51	239.73	0.00
291011104	65.0000	EMERSON ELECTRIC CO	08/10/2011	01/12/2007	2,788.34	2,864.72	-76.38	0.00
665162533	640.0600	MFB NORTHERN FUNDS BD INDEX FD	08/25/2011	02/05/2010	6,951.00	6,701.39	249.61	0.00
665162806	630.1300	MFB NORTHERN FDS FIXED INCOME FD	08/25/2011	07/10/2009	6,547.00	6,301.30	245.70	0.00
713448108	13.0000	PEPSICO INC	08/29/2011	05/17/2005	830.58	732.03	98.55	0.00
713448108	12.0000	PEPSICO INC	08/30/2011	05/17/2005	769.53	675.72	93.81	0.00

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Cusip Number		Description	Date of Sale	Date of Acquisition	Sales Price of Stocks Bonds, etc.	Cost or Other Basis	Net Gain or Loss	Federal Income Tax Withheld
Noncovered *(Box 6 is checked)*		*(Box 9)*	*(Box 1a)*		*(Box 2)*			*(Box 4)*
89417E109	30.0000	THE TRAVELERS COMPANIES INC.	09/22/2011	11/09/2009	1,413.91	1,605.06	-191.15	0.00
867224107	23.0000	SUNCOR ENERGY INC NEW COM STK	09/28/2011	05/03/2010	629.40	791.72	-162.32	0.00
867224107	27.0000	SUNCOR ENERGY INC NEW COM STK	09/29/2011	Various	711.16	834.35	-123.19	0.00
231021106	25.0000	CUMMINS ENGINE INC	10/24/2011	09/02/2009	2,448.05	1,124.87	1,323.18	0.00
722005667	1623.4200	PIMCO COMMODITY REALRETURN STRATEGY FUND	12/14/2011	02/05/2010	11,623.67	12,484.11	-860.44	0.00
Total Long Term 15% Sales Reported on 1099-B					**78,795.09**	**71,324.56**	**7,470.52**	**0.00**

Report on Form 8949, Part II, with Box B checked

Long Term 28% Sales Reported on 1099-B								
78463V107	75.0000	MFC SPDR GOLD TR GOLD SHS	08/25/2011	05/07/2010	12,870.50	8,784.33	4,086.17	0.00
78463V107	.0000	MFC SPDR GOLD TR GOLD SHS	12/31/2011	02/05/2010	37.98	24.88	13.10	0.00
78463V107	.0000	MFC SPDR GOLD TR GOLD SHS	12/31/2011	02/16/2010	30.38	21.02	9.36	0.00
78463V107	.0000	MFC SPDR GOLD TR GOLD SHS	12/31/2011	03/19/2009	38.89	23.63	15.26	0.00
78463V107	.0000	MFC SPDR GOLD TR GOLD SHS	12/31/2011	05/07/2010	25.31	18.84	6.47	0.00
					13,003.06	**8,872.70**	**4,130.36**	**0.00**

Report on Form 8949, Part II, with Box B checked

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```
          DISTRIBUTIONS NOT MATCHED TO BENEFICIARY
          ----------------------------------------
04/25/11  CHECK PAYMENT TO WORLD AFFAIRS COUNCIL O                          -1000.00                      -1000.00   1104000027
          F OREGON                                                                     BENE DISTRIBUTION WITH NO SSN
          2010 GIFT FROM WILLIAM RAWSON,                                                    **CHANGED** 12/08/11 JSG
          REPLACEMENT CHECK FOR LOST CHECK ISSUED
          ON 12/20/10.
          FOR:
          TR TRAN#=08742           TR CD=750     REG=0    PORT=PRIN

07/12/11  CHECK PAYMENT TO RIDGE CREEK SCHOOL                                -500.00                       -500.00   1107000014
          FBO ALBERT C. RAWSON III                                                     UNMATCHED BENE DISTRIBUTION
          2010 GIFT FROM ALBERT CUMMINS RAWSON                                              **CHANGED** 12/08/11 JSG
          III, REPLACEMENT CHECK FOR LOST CHECK
          ISSUED ON 12/20/10.
          FOR: [redacted]
          TR T                     TR CD=750     REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO UNITED WAY OF CENTRAL M                          -9750.00                      -9750.00   1112000019
          INNESOTA                                                                     BENE DISTRIBUTION WITH NO SSN
          2011 GIFT FROM DAVID S. AND SYLVIA E.                                              **CHANGED** 01/03/12 KN
          CHASE.
          FOR:
          TR TRAN#=04880           TR CD=750     REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO MARY BRIDGE CHILDREN'S                           -4400.00                      -4400.00   1112000020
          FOUNDATION                                                                   BENE DISTRIBUTION WITH NO SSN
          2011 GIFT FROM GIVIN AND NANCY CHASE -                                             **CHANGED** 01/03/12 KN
          FOR THE AREA OF MOST NEED.
          FOR:
          TR TRAN#=04881           TR CD=750     REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO SARASOTA MEMORIAL HEALT                          -2600.00                      -2600.00   1112000021
          HCARE FOUNDATION                                                             BENE DISTRIBUTION WITH NO SSN
          2011 GIFT FROM GIVIN AND NANCY CHASE -                                             **CHANGED** 01/03/12 KN
          100% FOR PSYCHIATRIC CARE SERVICES.
```

```
TAX                                                                                       EDIT
CODE/DATE TRANSACTIONS                                    TAXABLE       INCOME   PRINCIPAL  NUMBER
--------- ------------                               ------------ ------------ ------------ ----------

314   OTHER DISBURSEMENTS (CONTINUED)
          DISTRIBUTIONS NOT MATCHED TO BENEFICIARY (CONTINUED)
          --------------------------------------------------

          FOR:
          TR TRAN#=04882         TR CD=750   REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO FRIENDS OF WASHOE                 -1375.00               -1375.00  1112000023
          2011 GIFT FROM GIVIN AND NANCY CHASE -                     BENE DISTRIBUTION WITH NO SSN
          FOR THE AREA OF MOST NEED.                                          **CHANGED** 01/03/12 KN
          FOR:
          TR TRAN#=04884         TR CD=750   REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO PORTLAND ART MUSEUM                -300.00                -300.00  1112000024
          2011 GIFT FROM WILLIAM M. RAWSON.                          BENE DISTRIBUTION WITH NO SSN
          FOR:                                                                **CHANGED** 01/03/12 KN
          TR TRAN#=04885         TR CD=750   REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO PORTLAND ART MUSEUM               -1000.00               -1000.00  1112000025
          2011 GIFT FROM WILLIAM M. RAWSON.                          BENE DISTRIBUTION WITH NO SSN
          FOR:                                                                **CHANGED** 01/03/12 KN
          TR TRAN#=04886         TR CD=750   REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO LAKEWOLD GARDENS                  -1375.00               -1375.00  1112000022
          2011 GIFT FROM GIVIN AND NANCY CHASE -                     BENE DISTRIBUTION WITH NO SSN
          FOR THE AREA OF MOST NEED.                                          **CHANGED** 01/03/12 KN
          FOR:
          TR TRAN#=04883         TR CD=750   REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO DOERNBECHER CHILDREN'S            -1000.00               -1000.00  1112000027
          FOUNDATION                                                 BENE DISTRIBUTION WITH NO SSN
          2011 GIFT FROM WILLIAM M. RAWSON.                                   **CHANGED** 01/03/12 KN
          FOR:
          TR TRAN#=04888         TR CD=750   REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO OREGON PUBLIC BROADCAST            -500.00                -500.00  1112000028
          ING                                                        BENE DISTRIBUTION WITH NO SSN
          2011 GIFT FROM WILLIAM M. RAWSON.                                   **CHANGED** 01/03/12 KN
          FOR:
          TR TRAN#=04889         TR CD=750   REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO ARTZ CENTER FOR DEVELOP            -500.00                -500.00  1112000029
          MENTAL HEALTH                                              BENE DISTRIBUTION WITH NO SSN
          2011 GIFT FROM WILLIAM M. RAWSON.                                   **CHANGED** 01/03/12 KN
          FOR:
          TR TRAN#=04890         TR CD=750   REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO MACDONALD CENTER                   -500.00                -500.00  1112000030
          2011 GIFT FROM WILLIAM M. RAWSON.                          BENE DISTRIBUTION WITH NO SSN
          FOR:                                                                **CHANGED** 01/03/12 KN
          TR TRAN#=04891         TR CD=750   REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO THE OREGON STUDENT ASSI            -500.00                -500.00  1112000026
          STANCE COMMISSION                                          BENE DISTRIBUTION WITH NO SSN
          2011 GIFT FROM WILLIAM M. RAWSON.                                   **CHANGED** 01/03/12 KN
          FOR:
          TR TRAN#=04887         TR CD=750   REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO T.E.S.S.A.                        -2200.00               -2200.00  1112000036
          2011 GIFT FROM STEVE AND HOLLIS SHUMWAY.                   BENE DISTRIBUTION WITH NO SSN
          FOR:                                                                **CHANGED** 01/03/12 KN
          TR TRAN#=04897         TR CD=750   REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO CARE & SHARE FOOD BANK             -700.00                -700.00  1112000037
          OF SOUTHERN CO                                             BENE DISTRIBUTION WITH NO SSN
          2011 GIFT FROM STEVE AND HOLLIS SHUMWAY.                            **CHANGED** 01/03/12 KN
          FOR:
          TR TRAN#=04898         TR CD=750   REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO HUMANE SOCIETY OF PIKES            -700.00                -700.00  1112000038
           PEAK REGION                                               BENE DISTRIBUTION WITH NO SSN
          2011 GIFT FROM STEVE AND HOLLIS SHUMWAY.                            **CHANGED** 01/03/12 KN
          FOR:
          TR TRAN#=04899         TR CD=750   REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO EL PASO COUNTRY SEARCH             -700.00                -700.00  1112000039
          & RESCUE                                                   BENE DISTRIBUTION WITH NO SSN
          2011 GIFT FROM STEVE AND HOLLIS SHUMWAY.                            **CHANGED** 01/03/12 KN
          FOR:
          TR TRAN#=04900         TR CD=750   REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO RAPHAEL HOUSE OF PORTLA            -500.00                -500.00  1112000031
          ND                                                         BENE DISTRIBUTION WITH NO SSN
          2011 GIFT FROM WILLIAM M. RAWSON.                                   **CHANGED** 01/03/12 KN
          FOR:
          TR TRAN#=04892         TR CD=750   REG=0    PORT=PRIN

12/14/11  CHECK PAYMENT TO PORTLAND RESCUE MISSION            -500.00                -500.00  1112000032
          2011 GIFT FROM WILLIAM M. RAWSON.                          BENE DISTRIBUTION WITH NO SSN
          FOR:                                                                **CHANGED** 01/03/12 KN
          TR TRAN#=04893         TR CD=750   REG=0    PORT=PRIN
```

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TAX                                                                                                             EDIT
CODE/DATE TRANSACTIONS                                                  TAXABLE        INCOME      PRINCIPAL    NUMBER
--------- ------------                                               ------------   ------------  ------------  ----------

314   OTHER DISBURSEMENTS (CONTINUED)
          DISTRIBUTIONS NOT MATCHED TO BENEFICIARY (CONTINUED)
          ---------------------------------------------------

12/14/11  CHECK PAYMENT TO OUTREACH IN BURNSIDE                         -500.00                       -500.00  1112000033
          2011 GIFT FROM WILLIAM M. RAWSON.                                          BENE DISTRIBUTION WITH NO SSN
          FOR:                                                                                 **CHANGED** 01/03/12 KN
          TR TRAN#=04894           TR CD=750     REG=0     PORT=PRIN

12/14/11  CHECK PAYMENT TO BOYS & GIRLS AID SOCIET                      -700.00                       -700.00  1112000034
          Y                                                                          BENE DISTRIBUTION WITH NO SSN
          2011 GIFT FROM WILLIAM M. RAWSON.                                                    **CHANGED** 01/03/12 KN
          FOR:
          TR TRAN#=04895           TR CD=750     REG=0     PORT=PRIN

12/14/11  CHECK PAYMENT TO SUMMIT FOUNDATION                           -2200.00                      -2200.00  1112000035
          2011 GIFT FROM STEVE AND HOLLIS SHUMWAY.                                   BENE DISTRIBUTION WITH NO SSN
          FOR:                                                                                 **CHANGED** 01/03/12 KN
          TR TRAN#=04896           TR CD=750     REG=0     PORT=PRIN

12/15/11  CHECK PAYMENT TO FLORIDA UNITED METHODIS                     -1000.00                      -1000.00  1112000042
          T CHILDREN'S HOME                                                          BENE DISTRIBUTION WITH NO SSN
          2011 GIFT FROM ALBERT CUMMINS RAWSON III                                             **CHANGED** 01/03/12 KN
          FOR:
          TR TRAN#=12942           TR CD=750     REG=0     PORT=PRIN

12/15/11  CHECK PAYMENT TO BIG BROTHERS/BIG SISTER                     -1000.00                      -1000.00  1112000043
          S OF MID-FLORIDA                                                           BENE DISTRIBUTION WITH NO SSN
          2011 GIFT FROM ALBERT CUMMINS RAWSON III                                             **CHANGED** 01/03/12 KN
          FOR:
          TR TRAN#=12943           TR CD=750     REG=0     PORT=PRIN

12/15/11  CHECK PAYMENT TO CULVER MILITARY ACADEMY                      -500.00                       -500.00  1112000044
          2011 GIFT FROM ALBERT CUMMINS RAWSON III                                   BENE DISTRIBUTION WITH NO SSN
          FOR:                                                                                 **CHANGED** 01/03/12 KN
          TR TRAN#=12944           TR CD=750     REG=0     PORT=PRIN

12/15/11  CHECK PAYMENT TO DARLINGTON SCHOOL                            -500.00                       -500.00  1112000045
          2011 GIFT FROM ALBERT CUMMINS RAWSON III                                   BENE DISTRIBUTION WITH NO SSN
          FOR:                                                                                 **CHANGED** 01/03/12 KN
          TR TRAN#=12945           TR CD=750     REG=0     PORT=PRIN

12/15/11  CHECK PAYMENT TO HIPPODROME STATE THEATE                      -500.00                       -500.00  1112000046
          R                                                                          BENE DISTRIBUTION WITH NO SSN
          2011 GIFT FROM ALBERT CUMMINS RAWSON III                                             **CHANGED** 01/03/12 KN
          FOR:
          TR TRAN#=12946           TR CD=750     REG=0     PORT=PRIN

12/15/11  CHECK PAYMENT TO GAINESVILLE COMMUNITY F                     -3000.00                      -3000.00  1112000047
          OUNDATION                                                                  BENE DISTRIBUTION WITH NO SSN
          2011 GIFT FROM ALBERT CUMMINS RAWSON III                                             **CHANGED** 01/03/12 KN
          FOR:
          TR TRAN#=12947           TR CD=750     REG=0     PORT=PRIN
                                                                     ------------   ------------  ------------
                                                                        -40500.00           0.00     -40500.00
```

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 (Not Automatic) 3-Month Extension, complete only Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

Electronic filing *(e-file)*. You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions) For more details on the electronic filing of this form, visit *www irs gov/efile* and click on *e-file for Charities & Nonprofits*

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed)

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only . . . . ▶ ☐

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Enter filer's identifying number, see instructions

Type or print
File by the due date for filing your return See instructions

Name of exempt organization or other filer, see instructions
JOHN & CATHERINE SHULER CHARITABLE TRUST (23-37498)

Employer identification number (EIN) or
☐ 42-6076704

Number, street, and room or suite no If a P O box, see instructions
PO BOX 803878

Social security number (SSN)
☐

City, town or post office, state, and ZIP code For a foreign address, see instructions
CHICAGO,IL 60680

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

Application Is For	**Return Code**	**Application Is For**	**Return Code**
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	01	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ▶ GREGORY COLBY

Telephone No ▶ 941-486-4808 FAX No ▶ 941-484-7898

- If the organization does not have an office or place of business in the United States, check this box . . . . ▶ ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ________ If this is for the whole group, check this box . . . . ▶ ☐ If it is for part of the group, check this box . . . . ▶ ☐ and attach a list with the names and EINs of all members the extension is for

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 20 12, to file the exempt organization return for the organization named above The extension is for the organization's return for

▶ ☒ calendar year 20 11 or
▶ ☐ tax year beginning ________, 20____, and ending ________, 20____

2 If the tax year entered in line 1 is for less than 12 months, check reason ☐ Initial return ☐ Final return
☐ Change in accounting period

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions	**3a**	$ 300.00
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit	**3b**	$
c	**Balance due.** Subtract line 3b from line 3a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	**3c**	$ 300.00

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

For Privacy Act and Paperwork Reduction Act Notice, see Instructions.