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
THE SHUMAKER FAMILY FOUNDATION

A Employer identification number
65-6406193

Number and street (or P O box number if mail is not delivered to street address): c/o Kimberly S. Zellmer, 11150 Overbrook Road
Room/suite: Ste. 350

B Telephone number (see instructions)
913-236-6868

City or town, state, and ZIP code
Leawood, KS 66211-2298

C If exemption application is pending, check here ▶ ☐

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

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶ $ 15,831,914

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

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

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).)*

	Line	Description	(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)	0			
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments	7	7		
	4	Dividends and interest from securities	618,548	618,548		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	399			
	b	Gross sales price for all assets on line 6a 3,227,145				
	7	Capital gain net income (from Part IV, line 2)		399		
	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	618,954	618,954		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	50,000	12,500		37,500
	14	Other employee salaries and wages	58,000	14,500		43,500
	15	Pension plans, employee benefits	8,262	2,065		6,197
	16a	Legal fees (attach schedule)	12,427	8,183		3,617
	b	Accounting fees (attach schedule)	1,000	0		0
	c	Other professional fees (attach schedule)	66,401	66,401		0
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	5,192	0		0
	19	Depreciation (attach schedule) and depletion	696	0		
	20	Occupancy	7,317	0		0
	21	Travel, conferences, and meetings	6,713	671		6,042
	22	Printing and publications	450	0		0
	23	Other expenses (attach schedule)	3,804	0		858
	24	**Total operating and administrative expenses.** Add lines 13 through 23	220,262	104,320		97,714
	25	Contributions, gifts, grants paid	628,477			628,477
	26	**Total expenses and disbursements.** Add lines 24 and 25	848,739	104,320		726,191
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	-229,785			
	b	**Net investment income** (if negative, enter -0-)		514,634		
	c	**Adjusted net income** (if negative, enter -0-)				

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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	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	214,805	192,416	192,416
	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			
	10a	Investments—U.S. and state government obligations (attach schedule)	925,869	701,964	699,347
	b	Investments—corporate stock (attach schedule)	9,642,862	9,679,015	10,130,089
	c	Investments—corporate bonds (attach schedule)	4,723,446	4,704,498	4,703,695
	11	Investments—land, buildings, and equipment. basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	112,102	112,102	109,367
	14	Land, buildings, and equipment: basis ▶ 4,488			
		Less. accumulated depreciation (attach schedule) ▶ 3,408	1,776	1,080	0
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	15,620,860	15,391,075	15,831,914
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)	0	0	
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	15,620,860	15,391,075	
	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)	15,620,860	15,391,075	
	31	**Total liabilities and net assets/fund balances** (see instructions)	15,620,860	15,391,075	

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	15,620,860
2	Enter amount from Part I, line 27a	2	-229,785
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	15,391,075
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	15,391,075

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	399
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	701,739	15,536,537	0.0451670
2009	758,715	13,066,790	0.0580644
2008	867,181	15,607,050	0.0555634
2007	803,108	17,809,311	0.0450948
2006	794,228	16,793,376	0.0472941

2	**Total** of line 1, column (d)	2	0.2511838
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	0.0502368
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	16,735,203
5	Multiply line 4 by line 3	5	840,722
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	5,146
7	Add lines 5 and 6	7	845,868
8	Enter qualifying distributions from Part XII, line 4	8	726,191

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	10,293	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	10,293	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	10,293	00
6	Credits/Payments:			
a	2011 estimated tax payments and 2010 overpayment credited to 2011 — 6a — 4,400 00			
b	Exempt foreign organizations—tax withheld at source — 6b			
c	Tax paid with application for extension of time to file (Form 8868) — 6c			
d	Backup withholding erroneously withheld — 6d			
7	Total credits and payments Add lines 6a through 6d	7	4,400	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	5,893	00
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10		
11	Enter the amount of line 10 to be **Credited to 2012 estimated tax** ▶ **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		✓
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		✓
	*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		✓
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		✓
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		✓
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		✓
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		✓
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	✓	
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	✓	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ Kansas			
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	✓	
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		✓
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		✓

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
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		✓
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		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✓	

Website address ▶ www shumakerfamilyfoundation.org

14 The books are in care of ▶ Judy Wright Telephone no. ▶ 913-764-1772
Located at ▶ 1948 E. Santa Fe Street, Olathe, KS ZIP+4 ▶ 66062

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		✓
	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		✓
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 ▶ 20___ , 20___ , 20___ , 20___			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions.)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20___ , 20___ , 20___ , 20___			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ 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		✓
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		✓

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

				Yes	No
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
SEE ATTACHED SCHEDULE				

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
Judy R. Wright 1948 E Santa Fe Street, Olathe, KS 66062	Exec Dir./ part-time	58,000	0	0
Total number of other employees paid over $50,000 ▶				0

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
Stepp & Rothwell, Inc. 7300 College Blvd, Ste 150, Overland Park, KS 66210	Investment Management	$66,401
Total number of others receiving over $50,000 for professional services ▶		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 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	
Total. Add lines 1 through 3 ▶	0

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	16,611,466
b	Average of monthly cash balances	1b	378,588
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	16,990,054
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	16,990,054
4	Cash deemed held for charitable activities. Enter 1 ½ % of line 3 (for greater amount, see instructions)	4	254,851
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	16,735,203
6	**Minimum investment return.** Enter 5% of line 5	6	836,760

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	836,760
2a	Tax on investment income for 2011 from Part VI, line 5	2a	10,293		
b	Income tax for 2011 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	10,293
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	826,467
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	826,467
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	826,467

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	726,191
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	726,191
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	726,191

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				826,467
2	Undistributed income, if any, as of the end of 2011				
a	Enter amount for 2010 only			627,666	
b	Total for prior years 20___,20___,20___		0		
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	0			
4	Qualifying distributions for 2011 from Part XII, line 4: ▶ $ 726,191				
a	Applied to 2010, but not more than line 2a			627,666	
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				98,525
e	Remaining amount distributed out of corpus	0			
5	Excess distributions carryover applied to 2011 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	0			0
6	**Enter the net total of each column as indicated below:**				
a	Corpus Add lines 3f, 4c, and 4e. Subtract line 5	0			
b	Prior years' undistributed income. Subtract line 4b from line 2b		0		
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
d	Subtract line 6c from line 6b Taxable amount—see instructions		0		
e	Undistributed income for 2010. Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f	Undistributed income for 2011. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2012				727,942
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0			
8	Excess distributions carryover from 2006 not applied on line 5 or line 7 (see instructions)	0			
9	**Excess distributions carryover to 2012.** Subtract lines 7 and 8 from line 6a	0			
10	Analysis of line 9:				
a	Excess from 2007				
b	Excess from 2008				
c	Excess from 2009				
d	Excess from 2010				
e	Excess from 2011				

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			
	(a) 2011	(b) 2010	(c) 2009	(d) 2008	(e) Total
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			N/A		
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).)

Dianne C. Shumaker

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

None

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

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see 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:

Judy Wright, Executive Director
1948 E Santa Fe Street, Olathe KS, 66062 (913) 764-1772

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

Grant application form and information required is provided on website (www shumakerfamilyfoundation org)

c Any submission deadlines.

Submission deadlines are listed on website.

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

Restrictions and limitations are listed on website.

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 SCHEDULE ATTACHED				
Total ▶ **3a**				628,477
b *Approved for future payment*				
NONE				
Total ▶ **3b**				0

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			14	7	
4 Dividends and interest from securities			14	618,548	
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	399	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a Refund?					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				618,954	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 618,954

(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)		✓
	(2) Other assets	1a(2)		✓
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		✓
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		✓
	(3) Rental of facilities, equipment, or other assets	1b(3)		✓
	(4) Reimbursement arrangements	1b(4)		✓
	(5) Loans or loan guarantees	1b(5)		✓
	(6) Performance of services or membership or fundraising solicitations	1b(6)		✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		✓

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
		N/A	

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

Dianne L. Shumaker — 5-15-12 — 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	Preparer's signature	Date	Check ☑ if self-employed	PTIN
Kimberly S Zellmer	Kimberly S Zellmer	5-14-2012		P01218330
Firm's name ▶ Zellmer Law Firm, LLC			Firm's EIN ▶	20-8241638
Firm's address ▶ 11150 Overbrook Road, Ste. 350, Leawood, KS 66211			Phone no	913-236-6868

The Shumaker Family Foundation
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PART I, line 3(a)and(b) INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS

Source	Amount
Bank of America	$ 7

PART I, line 4(a)and(b) DIVIDENDS & INTEREST FROM SECURITIES

Source		(a) Revenue per Books	(b) Net investment income
Charles Schwab	DIVIDENDS	$289,573	$289,573
Acct No. 8121-8280	INTEREST	$ 99,180	$ 99,180
	CAPITAL GAIN DIST.	$210,012	$210,012
	OID	$ 19,783	$ 19,783
Total to 990-PF, Part I, line 4		$618,548	$618,548

Part I, line 15 PENSION PLANS, EMPLOYEE BENEFITS

Description	(a) Expenses Per Books	(b) Net Invest-ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Employer Payroll Taxes	8,262	2,065	0	6,197

Part I, line 16a LEGAL FEES

Description	(a) Expenses Per Books	(b) Net Invest-ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Zellmer Law Firm, LLC				
Preparation of 2009 and 2010 990PF	7,605	7,605	0	0
Other Legal	4,822	578	0	3,617
Total	12,427	8,183	0	3,617

Part I, line 16b ACCOUNTING FEES

Description	(a) Expenses Per Books	(b) Net Invest-ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Payroll/Bookkeeping	1,000	0	0	0

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Part I, line 16c OTHER PROFESSIONAL FEES

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Investment Mgt. Fees to Stepp & Rothwell	66,401	66,401	0	0

Part I, line 18 TAXES

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Tax on invest. income		0	0	0
2010 excise tax	792			
2011 estimated payments	4,400			
Total	5,192			

Part I, line 20 OCCUPANCY

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Rent	6,000	0	0	0
Telephone/Internet	1,317	0	0	0
Total	7,317			

Part I, line 23 OTHER EXPENSES

Description	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Liability Insurance	375	0	0	0
Office supplies	715	0	0	0
Postage/Delivery	44	0	0	0
Dues (COF)	1,800	0	0	0
IT/Web design	858	0	0	858
Bank Fees	12	0	0	0
Total	3,804	0	0	858

2011 Depreciation and Amortization Worksheet
Shumaker Family Foundation

FORM 990-PF

Description of Property	Date Placed in Service			Method	Life	Cost or Other Basis	Bus./ Invest. Use %	Sec 179 Deduct. & Special Allow.	Accum. Depreciation	Basis for Depreciation	Current Year Deduction
OFFICE FURNITURE	08	28	06	SL	7.00	1,977	100%		1,692	1,977	282
CONFERENCE TABLE/CHAIRS	08	13	06	SL	7.00	1,551	100%		1,332	1,551	222
COMPUTER	04	29	09	SL	5.00	960	100%		384	960	192
TOTAL									3,408	4,488	696

The Shumaker Family Foundation
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PART II BALANCE SHEETS
Line 2 Savings and temporary cash investments

	(b) Book value	(c) Fair Market Value
Charles Schwab account	$ 84,201	$ 84,201
Bank of America account	$108,215	$108,215
TOTAL CASH	**$192,416**	**$192,416**

PART II BALANCE SHEETS
Line 10a Investments-U.S. and state government obligations

	(b) Book value	(c) Fair Market Value
U.S. Treasuries:		
100,000 US INFLATION INDEX Non-callable 01/15/2012 3.375%	$136,057	$127,549
100,000 US INFLATION INDEX Non-callable 07/15/2012 3.00%	$130,993	$128,642
Government Agency Bonds:		
50,000 FEDERAL HOME LN Non-callable 05/12/2014 6.045%	$ 53,088	$ 56,399
50,000 FEDERAL NATL MTG Non-callable 09/25/2012 6.47%	$ 54,890	$ 52,284
70,000 FEDERAL NATL MTG Non-callable 12/10/2015 10.35%	$100,755	$ 95,340
Taxable Municipal Bonds:		
100,000 NORTHGATE SCH DIST, PA 08/15/2019	$ 60,463	$ 70,313
Mortgage Pools:		
250,000 FNMA PL #746019 12/01/2033 5.50%	$ 41,970	$ 40,769
120,000 GNMA II #004116 4/20/38 6.5%	$ 32,316	$ 31,003
Mortgage Pools:		
250,000 GNMA PL #619340 01/15/34 5.5%	$ 91,432	$ 97,048
TOTAL GOVERNMENT	**$701,964**	**$699,347**

The Shumaker Family Foundation
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PART II BALANCE SHEETS

Line 10b Investments-corporate stock

	(b) Book value	(c) Fair Market Value
Stock Mutual Funds:		
17,423.9580 AMER CENTURY HERITAGE FD	$275,000	$349,873
7,700.9940 ARTIO INTL EQUITY	$241,084	$174,196
7,631.6870 ARTISAN EMRG MKTS FD	$119,304	$ 88,146
17,654.3770 ARTISAN INTL FUND	$363,218	$350,086
18,560.3780 ARTISAN INTL SMALL CAP FD	$385,208	$311,629
13,500.0020 ARTISAN INTL VALUE FUND	$279,694	$338,715
17,273.9730 ARTISAN MIDCAP FUND	$445,319	$568,832
45,527.2880 ARTISAN MIDCAP VALUE FD	$739,752	$896,888
18,134.0760 ARTISAN SMALL CAP VALUE FD	$227,340	$270,560
17,613.1910 BERWYN INCOME FUND	$225,731	$226,682
6,733.9990 BROWN CAP MGMT SMALL CO FD	$276,303	$294,814
36,000.7900 BUFFALO MID CAP FUND	$441,865	$561,612
4,638.0620 COHEN & STEERS REALTY	$273,875	$282,133
3,518.7360 DRIEHAUS EMERG MKTS GR FD	$116,842	$ 90,467
22,508.8180 EII INTL PROPERTY	$388,827	$303,419
13,620.6370 FAIRHOLME FUND	$412,656	$315,318
8,361.2390 FIDELITY CONVERT SEC FD	$230,108	$190,887
47,893.8800 FORESTER VALUE FD CL N	$574,727	$574,248
12,355.7220 LONGLEAF PARTNERS SMALL CAP	$287,187	$311,735
14,283.3230 LOOMIS SAYLES SMALL CAP GR	$197,919	$244,245
18,994.7850 MATTHEWS ASIAN GR & INC FD	$336,938	$286,251
21,948.6270 OSTERWEIS FUND	$499,759	$562,543
4,524.1820 PARADIGM VALUE FUND	$194,159	$237,701
6,015.4429 RS GLOBAL NAT RESOURCES FD	$226,976	$208,134
4,216.8250 T ROWE PRICE NEW ERA FUND	$185,706	$177,317
8,024.8570 THIRD AVE REAL ESTATE	$139,550	$162,905
40,326.7560 WASATCH EMERG MKT SM CAP FD	$100,011	$ 89,122
7,063.1470 WASATCH INTL GROWTH FUND	$114,647	$125,441
7,933.6280 WASATCH SM CAP GROWTH FD	$237,577	$299,970
30,400.5850 WILLIAM BLAIR MIDCAP GR	$296,537	$360,855
16,666.0400 WINTERGREEN FD	$235,825	$234,824
36,581.4460 YACKTMAN FUND	$609,371	$640,541
TOTAL CORPORATE STOCK	**$9,679,015**	**$10,130,089**

The Shumaker Family Foundation
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PART II BALANCE SHEETS

Line 10b Investments-corporate bonds

Corporate Bonds:	(b) Book value	(c) Fair Market Value
100,000 BEAR STEARNS CO. Non-callable 11/15/2014 5.70%	$102,255	$108,616
100,000 COCA-COLA 06/20/20	$ 71,698	$ 78,661
50,000 CREDIT SUISSE 5.4% 01/14/20	$ 50,998	$ 46,816
60,000 DEAN WITTER DISC Non-callable 01/01/2016 6.75%	$ 66,379	$ 59,882
50,000 EXELON GENERATION 5.2% CALLABLE 10/01/19	$ 51,874	$ 54,871
100,000 GOLDMAN SACHS 01/15/15 5.125%	$ 98,472	$102,071
100,000 HERTZ CORP Non-callable 06/01/2012 7.625%	$102,085	$102,000
50,000 HSBC FINANCE CP 3.3% 02/15/16	$ 50,000	$ 49,579
55,000 INTL NK RECON 05/01/18 SERIES B	$ 43,909	$ 48,262
50,000 INTL BK RECON & DEVELOP Non-callable 11/25/2013 5.5%	$ 53,182	$ 54,240
50,000 ITALY REPUBLIC Non-callable 06/15/2012 5.625%	$ 53,670	$ 53,144
100,000 LILLY ELI & CO Non-callable 01/01/2016 6.57%	$113,857	$119,103
50,000 PPG INDUSTRIES INC. Non-callable 11/01/2017 6.875%	$ 54,900	$ 59,522

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PART II BALANCE SHEETS
Line 10b Investments-corporate bonds (continued)

	(b) Book value	(c) Fair Market Value
50,000 SAFEWAY INC 5% 08/15/19	$ 51,270	$ 53,224
35,000 SNAP-ON INC 4.25% 01/15/18	$ 35,667	$ 37,034
100,000 VERIZON NEW JERSEY 01/17/2012 5.875%	$105,957	$100,181
100,000 WYETH Non-callable 03/15/2013 5.5%	$100,125	$105,905
	$1,206,298	$1,233,111
Bond Funds:		
25,276.9150 BUFFALO HIGH YIELD FUND	$276,844	$276,782
18,238.6560 CALAMOS CONVERTIBLE FUND	$322,348	$312,063
28,127.9100 DWS FLOATING RATE PLUS FD	$262,312	$255,120
36,327.9780 LOOMIS SAYLES BOND CL I	$487,862	$506,049
23,513.3090 PIMCO EMERGING MKTS	$260,219	$264,525
20,614.5450 PIMCO FOREIGN BOND FUND	$212,194	$218,102
58,631.9320 PIMCO HIGH YIELD FUND	$545,199	$526,515
13.4720 PIMCO REAL RETURN FUND	$ 153	$ 159
10,841.2000 T ROWE PRICE INTL BOND FD	$109,732	$105,593
9,321.4520 TCW EMERGING MKTS INC FD	$ 79,863	$ 76,809
41,154.7570 TCW TOTAL RETURN BOND FD	$395,652	$396,732
13,333.0000 NEUBERGER BERMAN HI YLD STR	$200,020	$181,995
12,200 POWERSHARES ETF BUILD AMERICA BOND PORTFOLIO	$345,802	$350,140
	$3,498,200	$3,470,584
TOTAL CORPORATE BONDS	**$4,704,498**	**$4,703,695**

The Shumaker Family Foundation
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PART II   BALANCE SHEETS

Line 13 Investments-Other

	(b) Book value	(c) Fair Market Value
UNIT Trusts:		
153 FT UNIT 753 ADVISORS DISCIPLINED INC TR SER 2003-11	$112,102	$109,367
TOTAL OTHER INVESTMENTS	**$112,102**	**$109,367**

The Shumaker Family Foundation
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Part IV CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

	(a) Property Sold	(b) How Acquired	(c) Date Acquired	(d) Date Sold	(e) Gross Sales Price	(g) Basis	(h)&(l) Gain/Loss
1a	100,000 MORGAN STANLEY 01/21/2011 5.05%	P	03/13/07	01/21/11	100,000	100,239	-239
b	10,299.189 COHEN & STEERS INTL RLTY	P	Various	01/28/11	113,035	129,924	-16,889
c	10,788.167 COLUMBIA EMERG MKTS	P	Various	01/28/11	118,562	146,444	-27,882
d	10,156.579 IVY GLOBAL NAT RESOURCES	P	Various	01/28/11	225,629	274,605	-48,976
e	2,802.463 LONGLEAF SMALL CAP FD	P	Various	01/28/11	75,000	81,812	-6,812
f	3,020.516 LOOMIS SAYLES SMALL CAP	P	04/25/08	01/28/11	50,000	42,228	7,772
g	31,866.889 MUTUAL BEACON FUND	P	Various	01/28/11	398,286	450,179	-51,893
h	15,764.377 WILLIAM BLAIR MID CAP FD	P	Various	01/28/11	200,000	170,419	29,581
i	150,000 COON RAPIDS MINN 02/01/2015 5.30%	P	08/15/03	02/01/11	150,000	148,751	1,248
J	1,557.248 ARTIO-J BAER INTL EQUITY	P	Various	04/28/11	50,000	68,419	-18,419
k	2,699.784 ARTISAN SMALL CAP VAL FD	P	Various	04/28/11	50,000	33,378	16,622
l	4,148.230 BUFFALO MID CAP FD	P	Various	04/28/11	75,000	62,766	12,234
m	2,606.768 LOOMIS SAYLES SMALL CAP	P	Various	04/28/11	50,000	36,190	13,810

The Shumaker Family Foundation
2009 Form 990-PF
EIN 65-6406193

Part IV CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME (continued)

	(a) Property Sold	(b) How Acquired	(c) Date Acquired	(d) Date Sold	(e) Gross Sales Price	(g) Basis	(h)&(l) Gain/Loss
n	107.875 SCHWAB SHORT-TERM BOND	P	Various	08/30/11	1,000	981	19
o	22,602.983 SCHWAB SHORT-TERM BOND	P	Various	09/13/11	209,530	203,041	6,489
p	60,000 WACHOVIA CORP 10/15/2011 5.30%	P	08/07/07	10/15/11	60,000	59,515	485
q	26,153.061 AM CENTURY INFL ADJ BOND	P	Various	11/30/11	343,078	296,083	46,995
r	23,606.053 DRIEHAUS ACTIVE INCOME	P	Various	11/30/11	235,824	264,150	-28,326
s	7,077.612 PIMCO REAL RETURN FD I	P	Various	11/30/11	86,155	78,662	7,494
t	25,410.250 T ROWE PRICE MID CAP VAL	P	Various	11/30/11	571,426	519,635	51,791
u	50,000 UST INFLATION INDEX 07/15/2013 1.875%	P	08/14/03	12/01/11	64,620	59,325	5,295
					$3,227,145		

2 Net Capital Gain $ 399

3 Net short-term capital gain/loss

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PART VIII OFFICERS, DIRECTORS, TRUSTEES, FOUNDATION MANAGERS

Line 1 Trustees, Foundation Manager and Compensation

(a) Name and Address	(b) Title/Average Hours Per Week	(c) Compensation	(d) Contrib. to Plans	(e) Expense account
Dianne C. Shumaker 1948 E. Santa Fe Street Olathe, KS 66062	Trustee/ part-time	0	0	0
Eric A. Shumaker 1948 E. Santa Fe Street Olathe, KS 66062	Managing Trustee/ part-time	$25,000	0	0
Megan I. Shumaker 1948 E. Santa Fe Street Olathe, KS 66062	Managing Trustee/ part-time	$25,000	0	0

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PART XV, LINE 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

Recipient	Foundation Status	Purpose	Amount
Nelson-Atkins Museum of Art 4525 Oak Street Kansas City, MO 64111	public charity	Art education	$25,000
Power U Center for Social Change 164 NW 20th Street, #104 Miami, FL 33127	public charity	General support	$15,000
Leadership Council on Child Abuse & Interpersonal Violence P.O. Box 6815 Baltimore, MD 21285-6815	public charity	General support	$25,000
Nature's Voice Our Choice Carlyle Crescent Center 1940 Duke Street, Suite 200 Alexandria VA 22314	public charity	General support	$24,000
SEE (Social and Environmental Entreprenuers) Innovation 68 Morningside Dr. Asheville, NC 28806	public charity	Dream of a Nation project to raise public awareness of social & environmental issues	$40,000
Cincinnati Zoo 3400 Vine Street Cincinnati, OH 45220	public charity	Polar bear breeding project	$35,000
Metropolitan Organization to Counter Sexual Assault 3100 Broadway, Suite 400 Kansas City, Missouri 64111-2591	public charity	Strength Club program for teenage boys	$25,000

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PART XV, LINE 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR(continued)

Recipient	Foundation Status	Purpose	Amount
First Call 633 East 63rd Street Kansas City, Missouri 64110	public charity	Caring for Kids program for families with alcohol/substance abuse	$10,000
Science Pioneers Union Station 30 W. Pershing, Ste. 410 Kansas City, Missouri 64108	public charity	General support	$23,385
Lawrence Community Shelter 214 W 10th St Lawrence, KS 66044	public charity	Building Fund	$6,000
Sustainable Sanctuary Coalition P.O. Box 732 Mission, KS 66201	public charity	General support	$25,000
Animals & Society Institute 2512 Carpenter Road Suite #202-A Ann Arbor, MI 48108-1188	public charity	AniCare Rapid Response program to provide court-ordered classes for convicted animal abusers	$10,000
Hope House P.O. Box 577 Lee's Summit, MO 64063	public charity	Computers and other technology updates	$21,795
Junior League of Wyandotte & Johnson Counties in Kansas 9300 W. 87 St. Overland Park, KS 66212	public charity	Mary Jane Burke Scholarship Fund	$100
Kansas City Friends of Alvin Ailey 1714 East 18th Street Kansas City, MO 64108	public charity	General support	$100

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PART XV, LINE 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR(continued)

Recipient	Foundation Status	Purpose	Amount
Green Works in Kansas City 4334 McGee Kansas City, MO 64111	public charity	ECOS project for inner city youth	$9,500
Kids4Peace Vermont 1008 Hemenway Road Bridport VT 05734	public charity	Support of multi-faith summer camp	$9,500
Kansas Land Trust 16 East 13th Street Lawrence, KS 66044-3502	public charity	Promotion of conservation easements	$9,750
Defenders of Wildlife 1130 17th Street, NW Washington, DC 20036	public charity	Support of endangered animals	$15,000
Land Empowerment Amimals People 3378 Revere Avenue Oakland, California 94605	public charity	Support of endangered animals program	$50,000
Glory House Services 3924 Warwick Boulevard Kansas City, MO 64111-1522	public charity	General support	$100
Kansas Interfaith Power and Light 1204 Oread Avenue Lawrence, KS 66044	public charity	Support for strategic planning consultant	$7,493
Institute for Study & Practice of Nonviolence 265 Oxford Street Providence, RI 02905	public charity	Support of youth programs	$5,000

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PART XV, LINE 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR(continued)

Recipient	Foundation Status	Purpose	Amount
Kansas Big Brothers Big Sisters 3908 Washington Kansas City, MO 64111-2925	public charity	General Support	$15,000
The Family Conservancy 444 Minnesota Ave., Ste 200 Kansas City, KS 66101	public charity	TALK READ PLAY program	$25,000
S.A.F.E. Shelter & Assistance in Family Emergencies, Inc. 105 Clark Place Tupelo, MS 38804-373	public charity	Bullying prevention program	$9,200
TDC Learning Centers, Inc. 3500 SW 10th Ave. Topeka, KS 66604	public charity	Support parenting and early childhood education center	$9,500
Family Services & Guidance Center 325 SW Frazier Avenue Topeka, KS 66606-1963	public charity	Hiring of early educator for children with behavioral disorders	$22,040
Sheffield Place 6604 East 12th Street Kansas City, MO 64126	public charity	Education of homeless mothers in computer and finance skills	$8,000
Lyric Opera of Kansas City 1616 Broadway Kansas City, MO 64108	public charity	Support of opera outreach to inner city schools	$10,000

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PART XV, LINE 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR(continued)

Recipient	Foundation Status	Purpose	Amount
Teach for America 2000 Baltimore Ave Suite 300 Kansas City, MO 64108	public charity	Recruitment and training of teachers for inner city schools	$25,000
Partnership for Regional Educational Preparation (PREP-KC) 700 W. 47th, 6th Fl. Kansas City, MO 64112	public charity	Training for middle and high school math teachers	$25,000
Legal Aid of Western Missouri 1125 Grand Blvd., #1900 Kansas City, MO 64106	public charity	Immigration project hiring of bi-lingual attorney	$50,000
Kansas City Artists Coalition 201 Wyandotte Street Kansas City, MO 64105	public charity	General support	$100
Lawrence Humane Society 1805 East 19th Street Lawrence, KS 66046	public charity	General support	$100
Bishop Ward High School 708 North 18th St. Kansas City, Ks 66102	public charity	General support	$100
Kansas City Hospice & Pallative Care 9221 Ward Pkwy # 100 Kansas City, MO 64114	public charity	Kansas City Hospice House	$100
Theatre Lawrence 1501 New Hampshire Street Lawrence, KS 66044	public charity	Community theater outreach and scholarships	$10,000

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PART XV, LINE 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR(continued)

Recipient	Foundation Status	Purpose	Amount
Lawrence Arts Center 940 New Hampshire Street Lawrence, KS 66044	public charity	Scholarships for art classes	$9,999
Children's Campus of Kansas City, Inc. 444 Minnesota Ave, Ste. 100 Kansas City, KS 66101	public charity	Support of parent engagement network	$1,000
Stewards of Creation Alaska Interfaith Power & Light 565 University Ave., Ste, 4 Fairbanks, AK 99709	public charity	General support	$16,615

TOTAL GRANTS AND CONTRIBUTIONS PAID IN 2011 **$628,477**