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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.

2012

Open to public inspection

For calendar year 2012 or tax year beginning JUL 1, 2012, and ending JUN 30, 2013

Name of foundation <b>PUKALL LUMBER FOUNDATION, INC.</b>		A Employer identification number <b>23-7396586</b>
Number and street (or P O box number if mail is not delivered to street address) <b>10894 HWY 70 EAST</b>		B Telephone number <b>715-356-3252</b>
City or town, state, and ZIP code <b>ARBOR VITAE, WI 54568</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) <b>\$ 643,626.</b> (Part I, column (d) must be on cash basis.)		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		21,010.	21,010.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		16,305.			
b Gross sales price for all assets on line 6a <b>267,627.</b>					
7 Capital gain net income (from Part IV, line 2)			16,305.		
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)					
11 Other income					
12 Total. Add lines 1 through 11		37,315.	37,315.		
13 Compensation of officers, directors, trustees, etc		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees <b>STMT 2</b>		555.	0.		555.
c Other professional fees <b>STMT 3</b>		5,343.	5,343.		0.
17 Interest					
18 Taxes					
19 Depreciation and depletion <b>NOV 18 2013</b>					
20 Occupancy					
21 Travel, conferences, and meetings <b>TOLLER 02</b>					
22 Printing and publications <b>IRS OGDEN, UTAH</b>					
23 Other expenses <b>STMT 4</b>		19.	0.		19.
24 Total operating and administrative expenses. Add lines 13 through 23		5,917.	5,343.		574.
25 Contributions, gifts, grants paid		30,100.			30,100.
26 Total expenses and disbursements. Add lines 24 and 25		36,017.	5,343.		30,674.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		1,298.			
b Net investment income (if negative, enter -0-)			31,972.		
c Adjusted net income (if negative, enter -0-)				N/A	

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**Part II Balance Sheets**

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing	11,028.	16,479.	16,479.
	2 Savings and temporary cash investments	13,814.	23,331.	23,331.
	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			
	7 Other notes and loans receivable ▶			
	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			
	b Investments - corporate stock			
	c Investments - corporate bonds STMT 5	50,004.	50,004.	52,574.
11 Investments - land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 6	559,879.	546,209.	551,242.	
14 Land, buildings, and equipment: basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers)	634,725.	636,023.	643,626.	
<b>Liabilities</b>	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			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds	634,725.	636,023.		
30 Total net assets or fund balances	634,725.	636,023.		
31 Total liabilities and net assets/fund balances	634,725.	636,023.		

**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	634,725.
2 Enter amount from Part I, line 27a	2	1,298.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	636,023.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	636,023.

**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.)
<b>1a PUBLICLY TRADED SECURITIES</b>			<b>P</b>	<b>VARIOUS</b>	<b>VARIOUS</b>
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
(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)		
<b>a</b> 267,627.		251,322.	16,305.		
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
<b>a</b>			16,305.		
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
<b>2</b> 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 }			<b>2</b>	16,305.	
<b>3</b> 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). If (loss), enter -0- in Part I, line 8			<b>3</b>	N/A	

**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))
2011	31,491.	631,076.	.049900
2010	32,651.	647,353.	.050438
2009	27,570.	656,658.	.041985
2008	32,463.	622,611.	.052140
2007	32,810.	647,008.	.050710

<b>2</b> Total of line 1, column (d)	<b>2</b>	.245173
<b>3</b> 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	<b>3</b>	.049035
<b>4</b> Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	<b>4</b>	649,315.
<b>5</b> Multiply line 4 by line 3	<b>5</b>	31,839.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	320.
<b>7</b> Add lines 5 and 6	<b>7</b>	32,159.
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	30,674.

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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	639.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	639.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	639.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2012 estimated tax payments and 2011 overpayment credited to 2012	6a	280.	
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	280.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> 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	359.	
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 2013 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 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		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
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.		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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		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?	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.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> WI		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	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 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

**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 ► N/A

14 The books are in care of ► SUE PUKALL Telephone no. ► 715-356-3252  
 Located at ► WOODRUFF, WI ZIP+4 ► 54568

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 N/A

16 At any time during calendar year 2012, 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?  
 See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►

16	Yes	No
		X

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	<u>N/A</u>	
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 2012?		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 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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.)	<u>N/A</u>	
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2012 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 2012.)	<u>N/A</u>	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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 2012?		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)?

☐ 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)?

N/A

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?

N/A

☐ 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

X

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?

N/A

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.

(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
ROGER PUKALL ARBOR VITAE, WI	DIRECTOR			
	0.25	0.	0.	0.
MARY E. PUKALL ARBOR VITAE, WI	DIRECTOR			
	0.25	0.	0.	0.
SUSAN C. PUKALL ARBOR VITAE, WI	DIRECTOR			
	0.25	0.	0.	0.
DEBRA J. CHRISTENSEN BLOOMINGTON, MN	DIRECTOR			
	0.25	0.	0.	0.

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

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

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

0

Form 990-PF (2012)





**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	625,540.
b	Average of monthly cash balances	1b	33,663.
c	Fair market value of all other assets	1c	
d	<b>Total</b> (add lines 1a, b, and c)	1d	659,203.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	659,203.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	9,888.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	649,315.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	32,466.

**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	32,466.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	639.
b	Income tax for 2012. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	639.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	31,827.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	31,827.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	31,827.

**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	30,674.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	30,674.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	30,674.

**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 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				31,827.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2012:				
a From 2007				
b From 2008	924.			
c From 2009				
d From 2010				
e From 2011	335.			
f Total of lines 3a through e	1,259.			
4 Qualifying distributions for 2012 from Part XII, line 4: ▶ \$	30,674.			
a Applied to 2011, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2012 distributable amount				30,674.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a))	1,153.			1,153.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	106.			
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 2011. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a	106.			
10 Analysis of line 9:				
a Excess from 2008				
b Excess from 2009				
c Excess from 2010				
d Excess from 2011	106.			
e Excess from 2012				

N/A

- ☐ 4942(1)(3) or ☐ 4942(1)(5)

- (4) Gross investment income

[illegible]

### 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).)

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.

**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 or e-mail of the person to whom applications should be addressed:

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

- c Any submission deadlines:**

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



## Analysis of Income-Producing Activities

Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
		14	21,010.	
		18	16,305.	
	0.		37,315.	0.

### Relationship of Activities to the Accomplishment of Exempt Purposes

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).

N/A
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Pukall Lumber Foundation, Inc.  
Form 990PF, Part XV - Grants and Contributions Paid During the Year  
6/30/2013

EIN 27-7396586

Recipient Name and Address	Date of Grant or Contribution	Foundation Status of Recipient	Purpose of Grant or Contribution	2013
Alzheimer's Association of Greater 8A West Davenport St. Rhinelander, WI 54501	4/9/2013	Public Charity	General Fund	350
American Cancer Society Pewaukee, WI	12/5/2012	Public Charity	General Fund General Fund	700
American Cancer Society - Rhi division Rhinelander, WI	12/18/2012	Public Charity	General Fund	300
American Legion Post 89 Minocqua, WI 54548	5/29/2013	Public Charity	General Fund	300
Angel on My Shoulder (Cancer support)	2/19/2013	Public Charity	General Fund	150
Arbor Vitae Volunteer Fire Dept. 10672 Big Arbor Vitae Dr. Arbor Vitae, WI	4/15/2013	Municipality	General Fund	1000
Ascension Lutheran PO Box 940 Minocqua, WI 54548	5/29/2013		General Fund Building Fund	1000
Big Brothers, Big Sisters of the Northw. PO Box 142 Park Falls, WI 54552	5/29/2013	Public Charity	General Fund	300
Boulder Junction Volunteer Fire Dept. PO Box 395 Boulder Junction, WI 54512	4/15/2013	Municipality	General Fund	500
Boy Scouts of America, Samoset Council 3511 Camp Phillips Rd. Weston, WI 54476	5/15/2013	Public Charity	General Fund	275
Calvary Lutheran Church po Box 63 Minocqua, WI	4/16/2013	Public Charity	General Fund	1500
Camp Nawakwa YMCA 13400 Camp Nawakwa Lane Lac du Flambeau, WI 54538	4/9/2013	Public Charity	General Fund	500

Pukall Lumber Foundation, Inc.  
Form 990PF, Part XV - Grants and Contributions Paid During the Year  
6/30/2013

EIN 27-7396586

Recipient Name and Address	Date of Grant or Contribution	Foundation Status of Recipient	Purpose of Grant or Contribution	2013
Campanile Center for the Arts PO Box 905 Minocqua, WI 54548	6/12/2013	Public Charity	General Fund	500
Care PO Box 1871 Merrifield, VA 22116	1/2/2013	Public Charity	General Fund Haitian Relief	500
Doctors Without Borders New York, NY	1/2/2013	Public Charity	General Fund Haitian Relief	750
Dr. Kate Hospice PO Box 770 Woodruff, WI	7/3/2012 2/12/2013	Public Charity	General Fund	750 100
Dr. Kate Museum PO Box 851 Woodruff, WI	4/15/2013	Public Charity	General Fund	300
Girl Scouts of Northwestern Great Lakes 3511 Camp Phillips Rd. Schofield, WI 54476	5/15/2013	Public Charity	General Fund	275
Girls on the Run Northwoods PO Box 1231 Minocqua	12/5/2012	Public Charity	General Fund	150
Howard Young Foundation PO Box 470 Woodruff, WI 54568	3/22/2013	Public Charity	General Fund	5000 MP memorial
Humane Society of Vilas County PO Box 904 Eagle River, WI 54521	5/29/2013	Public Charity	General Fund	400
Lac du Flambeau Fire & Rescue PO Box 68 Lac du Flambeau, WI 54538	4/15/2013	Municipality	General Fund	500
Lac du Flambeau Lion's Club	5/31/2013	Public Charity	General Fund	250
Lakeland Food Pantry c/o HYHC Fdn, PO Box 470 Woodruff	8/22/2012	Public Charity	General Fund Endowment	250



Pukall Lumber Foundation, Inc.  
Form 990PF, Part XV - Grants and Contributions Paid During the Year  
6/30/2013

EIN 27-7396586

Recipient Name and Address	Date of Grant or Contribution	Foundation Status of Recipient	Purpose of Grant or Contribution	2013
Lakeland Rotary Foundation PO Box 620 Minocqua, WI	7/20/2013	Public Charity	General Fund	750
Lakeland Performing Arts Foundation PO Box 1279 Minocqua, WI	5/7/2013	Public Charity	General Fund	500
Lakeland Retirement Foundation PO Box 1815 Woodruff, WI	6/12/2013	Public Charity	General Fund	500
Lakeland Sharing Foundation PO Box 1536 Woodruff, WI	11/20/2012	Public Charity	General Fund	300
Lakeland Swim Club	11/30/2012	Public Charity	General Fund	175
Leigh Yawkey Woodson Art Museum 700 N. 12th St. Wausau, WI 55403	12/5/2012	Public Charity	General Fund	350
Manito Art League PO Box 298 Manitowish Waters, WI 54545	5/29/2013	Public Charity	General Fund	300
Manitowish Waters Bike Trail PO Box 326 Manitowish Waters, WI 54545	11/6/2012	Public Charity	General Fund	500
Manitowish Waters Lions Club Manitowish Waters, WI 54545	9/12/2013	Public Charity	General Fund	25
Manitowish Waters Vol. Fire Dept PO Box 367 Manitowish Waters, WI 54545	4/15/2013	Municipality	General Fund	500
Nicolet College Foundation PO Box 518 Rhinelander, WI 54501	10/31/2012	Public Charity	Scholarship Fund Building Trades/Carpentry	500
Northwoods Alliance for Temporary Ho PO Box 54501 Rhinelander, WI 54501	5/29/2013	Public Charity	General Fund	500

Pukall Lumber Foundation, Inc.  
Form 990PF, Part XV - Grants and Contributions Paid During the Year  
6/30/2013

EIN 27-7396586

Recipient Name and Address	Date of Grant or Contribution	Foundation Status of Recipient	Purpose of Grant or Contribution	2013
Northwoods Wildlife Center 8683 Blumenstein Rd. Minocqua, WI	9/13/2012	Public Charity	General Fund Building Fund	500
Pastime Club (dementia day care) PO Box 276 Minocqua, WI 54548		Public Charity	General Fund	
Plum Lake Ambulance PO Box 7 Sayner, WI 54560	8/31/2012	Municipality	General Fund	250
Plum Lake Fire Department PO Box 246 Sayner, WI 54560	4/15/2013	Municipality	General Fund	500
Presque Isle Fire Department Presque Isle, WI 54557	4/15/2013	Public Charity	General Fund	500
Raptor Education Group, Inc (Wildlife R PO Box 481 Antigo, WI 54409	6/12/2013	Public Charity	General Fund	300
Salvation Army of Wisc & Upper MI PO Box 428 Wausau, WI 54402	1/2/2013	Public Charity	General Fund Haitian Relief	750
Special Olympics Wisconsin Madison, WI	4/9/2013	Public Charity	General Fund Summer Games	300
St. Germain Fire & Rescue po Box 216 St. Germain, WI 54558	3/20/2013 4/15/2013	Municipality	General Fund	500 500
St. Jude Children's Hospital	4/9/2013	Public Charity	General Fund	250
Trees For Tomorrow PO Box 609 Eagle River, WI 54521	6/12/2013	Public Charity	General Fund	750
Truth in Business Carlson school of Business club w/ 501c:	10/2/2012	Public Charity	General Fund	100

Pukall Lumber Foundation, Inc.  
Form 990PF, Part XV - Grants and Contributions Paid During the Year  
6/30/2013

EIN 27-7396586

Recipient Name and Address	Date of Grant or Contribution	Foundation Status of Recipient	Purpose of Grant or Contribution	2013
Vilas Cty Econ Dvlpmt Corp PO Box 1621 Eagle River, WI 54521	9/25/2012	Municipality	General Fund	1000
Wausau Performing Arts Foundation PO Box 1553, Wausau 55402	4/11/2013	Public Charity	General Fund	300
Wisc. Deputy Sheriff Assn	5/28/2013		General Fund	200
Wisc Kids Snow-Mo Racing Assn 503 Shenandoah Ridge Rd. Wausau, WI	10/17/2012			300
Wisconsin Public Television 821 University Ave. Madison, WI 53706	5/2/2013	Public Charity	Wisc. Program Fund general fund	300
Wisconsin Tree Farm Committee W155 S7998 Foxboro Circle Muskego, WI 53150	5/24/2013	Public Charity	General Fund	250
Woodruff Fire Department PO Box 177 Woodruff, WI	4/15/2013	Municipality	General Fund	750
WXPR Public Radio 303 W. Prospect St. Rhinelander, WI 54501	12/3/2012	Public Charity	General Fund	300

Total Contribution: \$ 30,100.00

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
PORTFOLIO INCOME	21,010.	0.	21,010.
TOTAL TO FM 990-PF, PART I, LN 4	21,010.	0.	21,010.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	555.	0.		555.
TO FORM 990-PF, PG 1, LN 16B	555.	0.		555.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PORTFOLIO MANAGEMENT FEES	5,343.	5,343.		0.
TO FORM 990-PF, PG 1, LN 16C	5,343.	5,343.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ANNUAL REPORT FILING FEE	10.	0.		10.
POSTAGE	9.	0.		9.
TO FORM 990-PF, PG 1, LN 23	19.	0.		19.

FORM 990-PF	CORPORATE BONDS	STATEMENT	5
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
BANK AMER CORP SR INTNOTES BE	20,002.	20,829.	
BANK AMER CORP SR INTNOTES BE	30,002.	31,745.	
TOTAL TO FORM 990-PF, PART II, LINE 10C	50,004.	52,574.	

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	6
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
SPDR S&P 50 ETF TRUST UNIT SER	COST	9,405.	11,550.
BLACKROCK US OPPORT INSTL CLASS	COST	11,864.	11,311.
COHEN & STEERS REALTY	COST	4,888.	5,468.
DELAWARE EMERGING MKTS	COST	6,358.	5,557.
DWS BLUE CHIP FUND	COST	0.	0.
GOLDMAN SACHS EMERGING MKTS	COST	8,533.	8,020.
OAKMARK FUND	COST	23,555.	28,312.
JPMORGAN EMERGING MARKETS	COST	11,956.	10,770.
JPMORGAN INTERNATL VALUE SELECT	COST	11,687.	11,283.
JPMORGAN MID CAP EQUITY FUND	COST	9,439.	11,440.
JPMORGAN US EQUITY FUND SELECT	COST	24,755.	29,787.
JPMORGAN US REAL ESTATE FD	COST	0.	0.
THORNBURG INTL VALUE CL INSTL	COST	11,863.	11,355.
JPMORGAN CORE BOND SELECT SHARES	COST	102,650.	103,963.
JPMORGAN HIGH YIELD BOND FUND	COST	17,588.	17,043.
JPMORGAN SHORT DURATION BOND	COST	21,207.	21,092.
MFS SER TR X EMERGING MARKET	COST	8,291.	8,085.
T ROWE PRICE NEW INCOME	COST	105,188.	104,381.
ISHARES TRUST RUSSELL 2000	COST	12,745.	12,998.
VANGUARD SECTOR INDEX FDS	COST	5,382.	5,429.
DREYFUS EMERGING MARKETS	COST	11,864.	10,593.
FEDERATED INSTITUTIONAL HIGH	COST	17,334.	16,941.
JOHN HANCOCK INCOME FUND	COST	11,864.	11,328.
MASSACHUSETTS INVESTORS	COST	22,890.	22,686.
MFS RESEARCH INTERNATIONAL	COST	14,830.	14,013.
PIMCO TOTAL RETURN FUND	COST	37,074.	35,271.
TRANSAMERICA HIGH YIELD BOND	COST	5,932.	5,660.
VANGUARD BD INDEX FD INC	COST	17,067.	16,906.
TOTAL TO FORM 990-PF, PART II, LINE 13		546,209.	551,242.

FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT	7
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ACTIVITY ONE

GIFTS, CONTRIBUTIONS, SCHOLARSHIPS, AND OTHER GRANTS THAT ARE OF A GENERAL NATURE TO QUALIFYING ORGANIZATIONS IN THE WOODRUFF AND MINOCQUA, WISCONSIN AREA. THE LISTING OF GRANTS INDICATES THE VARYING DEGREES OF BENEFICIARIES

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 1

0.

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FORM 990-PF	GRANT APPLICATION SUBMISSION INFORMATION	STATEMENT	8
	PART XV, LINES 2A THROUGH 2D		

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NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

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SUSAN PUKALL  
AV 10894 HWY 70E  
WOODRUFF, WI 54568

---

TELEPHONE NUMBER

---

715-356-3252

---

FORM AND CONTENT OF APPLICATIONS

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LETTER EXPLAINING THE PURPOSE OF ORGANIZATION AND GRANT REQUEST. COPY OF  
EXEMPT STATUS CERTIFICATE.

---

ANY SUBMISSION DEADLINES

---

NONE.

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RESTRICTIONS AND LIMITATIONS ON AWARDS

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GRANTS ARE NORMALLY RESTRICTED TO ORGANIZATIONS IN THE NORTH CENTRAL  
WISCONSIN AREA.

# Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1704

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒ **X**
- 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](http://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.*

Type or print  File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions <b>PUKALL LUMBER FOUNDATION, INC.</b>	Employer identification number (EIN) or <b>23-7396586</b>
	Number, street, and room or suite no. If a P.O. box, see instructions. <b>10894 HWY 70 EAST</b>	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions <b>ARBOR VITAE, WI 54568</b>	

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

**04**

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	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

**SUE PUKALL**

- The books are in the care of ► **WOODRUFF, WI - 54568**

Telephone No. ► **715-356-3252**

FAX No. ►

- 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 **FEBRUARY 15, 2014**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☐ calendar year \_\_\_\_\_ or
- ☒ tax year beginning **JUL 1, 2012**, and ending **JUN 30, 2013**

- 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

<b>3a</b> 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.	<b>3a</b>	\$	<b>639.</b>
<b>b</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.	<b>3b</b>	\$	<b>280.</b>
<b>c</b> <b>Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions.	<b>3c</b>	\$	<b>359.</b>

**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.

LHA **For Privacy Act and Paperwork Reduction Act Notice, see instructions.**

Form 8868 (Rev. 12013)