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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013

Name of foundation DUANE & DOROTHY BLUEMKE FOUNDATION LTD		A Employer identification number 20-2058965	
Number and street (or P O box number if mail is not delivered to street address) P O BOX 425		B Telephone number (see instructions) (262) 569-1933	
City or town, state or province, country, and ZIP or foreign postal code STURGEON BAY, WI 542350425		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) ☐ \$ 8,098,691		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	8,764	8,764		
	4 Dividends and interest from securities.	85,668	85,668		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	152,545			
	b Gross sales price for all assets on line 6a 1,690,920				
	7 Capital gain net income (from Part IV, line 2) . . .		152,545		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	153,628		153,628	
	12 Total. Add lines 1 through 11	400,605	246,977	153,628	
	13 Compensation of officers, directors, trustees, etc	35,000	8,750		26,250
	14 Other employee salaries and wages	25,000	6,250		18,750
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	6,850	3,425		3,425
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	14,216	3,774		3,442
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	77,095	77,095		
	24 Total operating and administrative expenses. Add lines 13 through 23	158,161	99,294		51,867
	25 Contributions, gifts, grants paid	220,926			220,926
	26 Total expenses and disbursements. Add lines 24 and 25	379,087	99,294		272,793
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	21,518			
	b Net investment income (if negative, enter -0-)		147,683		
	c Adjusted net income (if negative, enter -0-)			153,628	

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	465,859	970,385	970,385
	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)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	6,712,301	6,227,925	7,128,306
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	7,178,160	7,198,310	8,098,691	
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	
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			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	7,178,160	7,198,310	
	30	Total net assets or fund balances (see page 17 of the instructions)	7,178,160	7,198,310	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	7,178,160	7,198,310	

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	7,178,160
2	Enter amount from Part I, line 27a	2	21,518
3	Other increases not included in line 2 (itemize) ▶ _____	3	3
4	Add lines 1, 2, and 3	4	7,199,681
5	Decreases not included in line 2 (itemize) ▶ _____	5	1,371
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	7,198,310

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 Additional Data Table			
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 See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) 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	
a See Additional Data Table			
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	152,545
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 page 18 of 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))
2012	346,625	6,832,718	0 050730
2011	322,500	7,077,264	0 045568
2010	441,956	6,942,222	0 063662
2009	480,326	6,707,692	0 071608
2008	480,229	9,260,103	0 051860

2	Total of line 1, column (d).	2	0 283428
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 056686
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	7,375,620
5	Multiply line 4 by line 3.	5	418,094
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	1,477
7	Add lines 5 and 6.	7	419,571
8	Enter qualifying distributions from Part XII, line 4. 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	8	272,793

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)					
1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1		1	2,954		
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		2			
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	2,954
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	2,954		
6 Credits/Payments		7	8,441		
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a			8,441	
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	8,441		
8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	5,487		
11 Enter the amount of line 10 to be Credited to 2014 estimated tax 5,487 Refunded		11			

Part VII-A Statements Regarding Activities				
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	Yes	No
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		No
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		No
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?		2		No
If "Yes," attach a detailed description of the activities.				
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		3		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?.		4a	Yes	
b If "Yes," has it filed a tax return on Form 990-T for this year?.		4b	Yes	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		No
If "Yes," attach the statement required by General Instruction T.				
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either		6	Yes	
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?		7	Yes	
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	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) WI				
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .		8b	Yes	
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 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV		9		No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.		10		No

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of CHRISTINE MILLER Telephone no (262) 796-1172 Located at PO BOX 425 STURGEON BAY WI ZIP +4 542350425			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here	15		
16	At any time during calendar year 2013, 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	Yes	No
See 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 page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		
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 2013?	1c		No
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 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? 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?			
b	If "Yes," did it have excess business holdings in 2013 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 2013.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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 2013?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☒ Yes ☐ No		
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions).	☐ Yes ☒ No		
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?		5b	No
	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	No
	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
DUANE H BLUEMKE P O BOX 425 STURGEON BAY,WI 54235	PRESIDENT 5 00	0	0	0
DOROTHY M BLUEMKE P O BOX 425 STURGEON BAY,WI 54235	VICE PRESIDE 10 00	0	0	0
CHRISTINE A MILLER P O BOX 425 STURGEON BAY,WI 54235	DIRECTOR 15 00	35,000	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				

Part VIII

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services.	1
--	---

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	
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	N/A	
2		
	All other program-related investments See page 24 of the instructions	
3		

Total.	Add lines 1 through 3		▶
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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	680,806
b	Average of monthly cash balances.	1b	6,807,133
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	7,487,939
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	7,487,939
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	112,319
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	7,375,620
6	Minimum investment return. Enter 5% of line 5.	6	368,781

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	368,781
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	2,954
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,954
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	365,827
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	365,827
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	365,827

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	272,793
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	272,793
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	272,793
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 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				365,827
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			210,148	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.				
c From 2010.				
d From 2011.				
e From 2012.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 272,793				
a Applied to 2012, but not more than line 2a			210,148	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2013 distributable amount.				62,645
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				303,182
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . .				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2009. . . .				
b Excess from 2010. . . .				
c Excess from 2011. . . .				
d Excess from 2012. . . .				
e Excess from 2013. . . .				

Part XIV

4942(j)(3) or 4942(j)(5)

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

1

See Additional Data Table

• 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

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

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

Part XV

Supplementary Information (continued)

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

Recipient	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
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	220,926
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
PUBLICALLY TRADED SECURITIES	P		
GOLDMAN SACHS 7432	P		
FROM PASSTHRU - WHITEHALL	P		
FROM PASSTHRU - WHITEHALL 1256	P		
FROM PASSTHRU - PORTFOLIO 2 OFFSHORE	P		
FROM PASSTHRU - TACS MARKET	P		
FROM PASSTHRU - TACS MARKET 1256	P		
FROM PASSTHRU - GS LIQUIDITY	P		
FROM PASSTHRU - LATEEF DYNAMIC	P		
FROM PASSTRHU - WEST STREET PARTNERS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
1,472,161		1,408,073	64,088
486			486
		7,546	-7,546
		699	-699
60,950			60,950
74,860			74,860
810			810
		122,057	-122,057
64,428			64,428
13,921			13,921

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) 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	
			64,088
			486
			-7,546
			-699
			60,950
			74,860
			810
			-122,057
			64,428
			13,921

Form 990PF Part XV Line 1a - 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).

DUANE H BLUEMKE
DOROTHY M BLUEMKE

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN HEART ASSOCIATION 208 S LASALLE ST 1500 CHICAGO,IL 60604	NONE	PC	FOR HEART DISEASE RESEARCH	3,000
AMERICAN LUNG ASSOCIATION 13100 WLISBON RD 700 BROOKFIELD,WI 53005	NONE	PC	FOR LUNG DISEASE RESEARCH	2,500
AMERICAN RED CROSS 805 FERN ST WEST PALM BEACH,FL 33401	NONE	PC	FOR ASSISTANCE TO STORM VICTIMS	15,000
AMERICAN RED CROSS OF SE WI 2600 W WISCONSIN AVE MILWAUKEE,WI 53233	NONE	PC	FOR GENERAL OPERATIONS	5,000
AMERICANS FOR PROSPERITY FOUNDATION 1126 S 70TH ST S410 MILWAUKEE,WI 53214	NONE	PC	FOR EDUCATION ON PUBLIC POLICY	1,000
AOPA FOUNDATION INC 421 AVIATION WAY FREDRICK,MD 21701	NONE	PC	FOR AVIATION SAFETY PROGRAMS	10,000
BIG BROTHERS BIG SISTERS OF MILW 788 N JEFFERSON ST STE 6 MILWAUKEE,WI 53202	NONE	PC	FOR MENTORING SERVICES	500
BLESSED SAVIOR LUTHERN CHURCH 15250 W CLEVELAND AVE NEW BERLIN,WI 53151	NONE	PC	FOR RENOVATING PIPE ORGAN	10,000
CATO INSTITUTE 1000 MASSACHUSETTS AVE WASHINGTON,DC 20001	NONE	PC	FOR GENERAL OPERATIONS	1,000
CHILDREN'S HOSPITAL & HEALTH SYSTEM 1570 E MORELAND RD WAUKESHA,WI 53186	NONE	PC	FOR THE VOLUNTEER RESPITE PROGRAM	25,000
CHRISTMAS CLEARING COUNCL 500 RIVERVIEW AVE WAUKESHA,WI 53188	NONE	PC	FOR GENERAL OPERATIONS	500
CONCORDIA UNIVERSITY FDTN 12800 N LAKE SHORE DR MEQUON,WI 53097	NONE	PC	FOR STUDENT DEVELOPMENT	1,000
CROHN'S COLITIS FDTN 386 PARK AVE SOUTH NEW YORK,NY 10016	NONE	PC	FOR CHROHNS & COLITIS RESEARCH	500
EASTER SEALS 233 SOUTH WACKER DR 200 CHICAGO,IL 60606	NONE	PC	FOR ASSISTANCE TO DISABLED PEOPLE	1,500
ELMBROOK ROTARY FOUNDATION P O BOX 1014 BROOKFIELD,WI 53008	NONE	PC	FOR SPIKES FOR TYKES FUNDRAISING	500
Total  3a				220,926

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year				
FAMILY HOUSE INC 3269 N 11TH ST MILWAUKEE,WI 53206	NONE	PC	FOR GENERAL OPERATIONS	500
FEEDING AMERICA EASTERN WI 1700 WFOND DU LAC AVE MILWAUKEE,WI 53205	NONE	PC	FOR ASSISTANCE TO HUNGRY FAMILIES	1,000
FOOD FOR THE HUNGRY 1224 E WASHINGTON ST PHOENIX,AZ 85034	NONE	PC	FOR ASSISTANCE TO HUNGRY FAMILIES	500
HEBRON HOUSE HOSPITALITY 111 E MAIN ST WAUKESHA,WI 53186	NONE	PC	FOR ASSISTANCE TO INDIGENT FAMILIES	1,000
HIBISCUS CHILDREN'S CENTER 1145 12 ST VERO BEACH,FL 32960	NONE	PC	FOR ASSISTANCE TO ABUSED CHILDREN	500
HILLSDALE COLLEGE 33 E COLLEGE ST HILLSDALE,MI 49242	NONE	PC	FOR EDUCATION	750
HOPE CENTER 502 N EAST AVE WAUKESHA,WI 53186	NONE	PC	FOR ASSISTANCE TO IDIGENT FAMILIES	500
INTERFAITH SENIOR PROGRAM 210 NW BARSTOW ST 101 WAUKESHA,WI 53188	NONE	PC	FOR FAITH IN ACTION PROGRAM	500
JUVENILE DIABETES RSRCH 3333 N MAYFAIR RD MILWAUKEE,WI 53222	NONE	PC	FOR TYPE 1 DIABETES RESEARCH	350
LITERACY SERVICES OF WI 555 N PLANKINTON AVE MILWAUKEE,WI 53203	NONE	PC	FOR READING PROGRAMS	500
LOVE INC 480 S PINE ST BURLINGTON,WI 53105	NONE	PC	FOR GENERAL OPERATIONS	500
LUTHERAN COUNSELING & FAM 3800 N MAYFAIR RD WAUWATOSA,WI 53222	NONE	PC	FOR SUSTAINABILITY OF MINISTRY	10,000
MEDICAL COLLEGE OF WI 8701 WATERTOWN PLANK RD MILWAUKEE,WI 53226	NONE	PC	FOR MEDICAL RESEARCH, EDUCATION	3,000
MILWAUKEE RESCUE MISSION 830 N 19TH ST MILWAUKEE,WI 53233	NONE	PC	FOR ASSISTANCE TO INDIGENT FAMILIES	10,000
NATIONAL MS SOCIETY 1120 JAMES DR STE A HARTLAND,WI 53029	NONE	PC	FOR MS RESEARCH	250
Total  3a				220,926

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a Paid during the year				
NATIONAL OSTEOPOROSIS FOUNDATION 1150 17TH STREET NW WASHINGTON,DC 20036	NONE	PC	FOR OSTEOPROROSIS RESEARCH	500
RED CROSS - NORTH TREASURE COAST CH 2506 17TH AVE VERO BEACH,FL 32960	NONE	PC	FOR ASSISTANCE TO STORM VICTIMS	10,000
RONALD MCDONALD HOUSE CHARITIES 8948 WATERTOWN PLANL RD MILWAUKEE,WI 53226	NONE	PC	FOR ASSISTANCE TO ILL CHILDREN	10,000
SALVATION ARMY 11315 W WATERTOWN PLANK R WAUWATOSA,WI 53226	NONE	PC	FOR GENERAL OPERATIONS	10,000
SPECIAL OLYMPICS OF WISCONSIN 5900 MONONA DR STE 301 MADISON,WI 53716	NONE	PC	FOR GENERAL OPERATIONS	200
THE HERITAGE FOUNDATION 214 MASSACHUSETTS AVE NE WASHINGTON,DC 20002	NONE	PC	FOR GENERAL OPERATIONS	1,000
UNITED WAY OF INDIAN RIV 1836 14TH AVE VERO BEACH,FL 32961	NONE	PC	FOR HEALTH AND HUMAN SERVICE PROGRAM	5,000
UNITED WAY OF WAUKESHA COUNTY PO BOX 1041 WAUKESHA,WI 53197	NONE	PC	FOR GENERAL OPERATIONS	5,000
UNIVERSITY OF WI MADISON 1848 UNIVERSITY AVE MADISON,WI 53726	NONE	PC	FOR SCHOLARSHIPS	41,576
UNIVERSITY OF WISCONSIN FOUNDATION 1848 UNIVERSITY AVE MADISON,WI 53726	NONE	PC	FOR EDUCATION	25,000
VERO BEACH HIGH SCHOOL PERFORMING 1707 16TH ST VERO BEACH,FL 32960	NONE	PC	FOR ARTS PROGRAM	500
VERO BEACH THEATER GUILD 2020 SAN JUAN AVE VERO BEACH,FL 32960	NONE	PC	FOR THEATER REPAIRS	500
WHEAT RIDGE MINISTRIES ONE PIERCE PL ITASCA,IL 60143	NONE	PC	FOR GENERAL OPERATIONS	300
WILSON CENTER FOR ARTS 19805 W CAPITAL DR BROOKFIELD,WI 53045	NONE	PC	FOR ARTS PROGRAM	2,500
WISCONSIN LUTHERAN COLLEGE 8800 W BLUEMOUND AVE MILWAUKEE,WI 53226	NONE	PC	FOR EDUCATION	1,000
Total  3a				220,926

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
WISCONSIN POLICY RESEARCH INSTITUTE 633 W WISCONSIN AVE 330 MILWAUKEE, WI 53203	NONE	PC	FOR GENERAL OPERATIONS	1,000
Total  3a				220,926

TY 2013 Accounting Fees Schedule

Name: DUANE & DOROTHY BLUEMKE
FOUNDATION LTD

EIN: 20-2058965

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	6,850	3,425		3,425

TY 2013 Compensation Explanation

Name: DUANE & DOROTHY BLUEMKE
FOUNDATION LTD
EIN: 20-2058965

Person Name	Explanation
DUANE H BLUEMKE	
DOROTHY M BLUEMKE	
CHRISTINE A MILLER	

TY 2013 Investments - Other Schedule

Name: DUANE & DOROTHY BLUEMKE
FOUNDATION LTD

EIN: 20-2058965

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
GOLDMAN SACHS 330809	AT COST	1,754,821	1,993,604
GOLDMAN SACHS - LATEEF - DYNAMIC EQ	AT COST	650,834	823,038
GOLDMAN SACHS - MOUNT KELLET CAPITAL	AT COST	725,790	840,488
GOLDMAN SACHS ALPHA + PORTFOLIO 2	AT COST	1,261,745	1,691,012
GOLDMAN SACHS LIQUIDITY PARTNERS			
GOLDMAN SACHS TACS MARKET CONTINUOUS	AT COST	877,829	1,074,088
GOLDMAN SACHS WEST STREET PARTNERS	AT COST	117,338	113,591
GOLDMAN SACHS WHITEHALL PARALLEL GLO	AT COST	839,568	592,485

TY 2013 Other Decreases Schedule

Name: DUANE & DOROTHY BLUEMKE
FOUNDATION LTD
EIN: 20-2058965

Description	Amount
BOOK/TAX DIFFERENCE - FLOW THROUGH ENTITIES	1,371

TY 2013 Other Expenses Schedule

Name: DUANE & DOROTHY BLUEMKE
FOUNDATION LTD

EIN: 20-2058965

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
INVESTMENT FEES	62,581	62,581		
ADMINISTRATIVE EXPENSES	6,524	6,524		
WHITEHALL PARALLEL GLOBAL	7,990	7,990		

TY 2013 Other Income Schedule

Name: DUANE & DOROTHY BLUEMKE
FOUNDATION LTD

EIN: 20-2058965

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MOUNT KELLET CAPITAL PARTNERS	59,312		59,312
WHITEHALL PARALLEL - UBTI	-1,440		-1,440
WHITEHALL PARALLEL - NON UBTI	93,826		93,826
GS TACS MARKET CONTINUOUS	1,930		1,930

TY 2013 Other Increases Schedule

Name: DUANE & DOROTHY BLUEMKE
FOUNDATION LTD
EIN: 20-2058965

Description	Amount
NONTAXABLE DISTRIBUTION	3

TY 2013 Taxes Schedule

Name: DUANE & DOROTHY BLUEMKE
FOUNDATION LTD

EIN: 20-2058965

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX PAID	2,626	2,626		
EXCISE TAX	7,000			
PAYROLL TAXES	4,590	1,148		3,442