Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter Social Security numbers on this form as it may be made public.

▶ Information about Form 990-PF and its separate instructions is at *www.irs.gov/form990pf*.

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning , 2013, and ending , 20

Name of foundation: KUHLE FAMILY FOUNDATION

A Employer identification number: 20-3995755

Number and street (or P O box number if mail is not delivered to street address): 2425 EAST CAMELBACK ROAD, SUITE 750

Room/suite

B Telephone number (see instructions): (602) 285-5022

City or town, state or province, country, and ZIP or foreign postal code: PHOENIX, AZ 85016

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: [X] 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)* ▶ $ 4,000,122.

J Accounting method: ☐ Cash [X] 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).)*

		(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)	846,223.			
2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	56,918.	56,918.		ATCH 1
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	43,401.			
b	Gross sales price for all assets on line 6a 802,480.				
7	Capital gain net income (from Part IV, line 2)		43,401.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances		EXTENSION		
b	Less Cost of goods sold		ATTACHED		
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	**Total.** Add lines 1 through 11	946,542.	100,319.	0	
Operating and Administrative Expenses 13	Compensation of officers, directors, trustees, etc	0			
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule) ATCH 2	4,700.	2,350.		2,350.
c	Other professional fees (attach schedule)				
17	Interest				
18	Taxes (attach schedule) (see instructions)				
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (attach schedule) ATCH 3	19,038.	19,028.		
24	**Total operating and administrative expenses.** Add lines 13 through 23	23,738.	21,378.		2,350.
25	Contributions, gifts, grants paid	147,250.			147,250.
26	**Total expenses and disbursements** Add lines 24 and 25	170,988.	21,378.	0	149,600.
27	Subtract line 26 from line 12				
a	**Excess of revenue over expenses and disbursements**	775,554.			
b	**Net investment income** (if negative, enter -0-)		78,941.		
c	**Adjusted net income** (if negative, enter -0-)			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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments	NONE	427,311.	427,311.
	3	Accounts receivable ▶			
		Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10 a	Investments - U S and state government obligations (attach schedule)			
	b	Investments - corporate stock (attach schedule) ATCH 4	2,941,024.	3,572,811.	3,572,811.
	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)			
	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)	2,941,024.	4,000,122.	4,000,122.
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			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	2,941,024.	4,000,122.	
	30	**Total net assets or fund balances** (see instructions)	2,941,024.	4,000,122.	
	31	**Total liabilities and net assets/fund balances** (see instructions)	2,941,024.	4,000,122.	

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	2,941,024.
2	Enter amount from Part I, line 27a	2	775,554.
3	Other increases not included in line 2 (itemize) ▶ ATCH 5	3	283,544.
4	Add lines 1, 2, and 3	4	4,000,122.
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	4,000,122.

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 PART IV SCHEDULE			
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			(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				
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	43,401.
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	0

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))
2012	148,760.	2,742,333.	0.054246
2011	180,760.	2,897,272.	0.062390
2010	58,616.	2,633,579.	0.022257
2009	107,372.	2,159,670.	0.049717
2008	86,807.	2,757,072.	0.031485

2	**Total** of line 1, column (d)	2	0.220095
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	0.044019
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	3,028,671.
5	Multiply line 4 by line 3	5	133,319.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	789.
7	Add lines 5 and 6	7	134,108.
8	Enter qualifying distributions from Part XII, line 4	8	149,600.

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 ▶ [X] and enter 1% of Part I, line 27b		1	789.
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	789.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
5	**Tax based on investment income** Subtract line 4 from line 3. If zero or less, enter -0-		5	789.
6	Credits/Payments			
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a 7,260.		
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	7,260.
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	6,471.
11	Enter the amount of line 10 to be **Credited to 2014 estimated tax** ▶ 6,471. **Refunded** ▶		11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		X
	If the answer is "Yes" to **1a** *or* **1b**, *attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ $ 0 (2) On foundation managers ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 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*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	N/A	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ AZ,			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses* ATCH 6	10	X	

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		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 ▶ THE FOUNDATION Telephone no ▶ (602)866-0900
Located at ▶ 2425 E. CAMELBACK ROAD, SUITE 750 PHOENIX, AZ ZIP+4 ▶ 85016

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here N/A ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ 15

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

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

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

				Yes	No
1a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?		1b	N/A	
	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 2013?		1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))				
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013?	☐ Yes ☒ No			
	If "Yes," list the years ▶ ________ , ________ , ________ , ________				
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions)		2b	N/A	
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ ________ , ________ , ________ , ________				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?		4b		X

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

5a During the year did the foundation pay or incur any amount to				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No			
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No			
(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No			
(4) Provide a grant to an organization other than a charitable, etc, organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions)	☐ Yes ☒ No			
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No			
b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?		**5b**	N/A	
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? *If "Yes," attach the statement required by Regulations section 53 4945-5(d)*	☐ Yes ☐ No			
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? *If "Yes" to 6b, file Form 8870*		**6b**		X
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**	N/A	

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
ATCH 7		0	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 Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 N/A	
2	
3	
4	

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

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

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	2,786,547.
b	Average of monthly cash balances	1b	288,246.
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	3,074,793.
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	3,074,793.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	46,122.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,028,671.
6	**Minimum investment return.** Enter 5% of line 5	6	151,434.

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	151,434.
2a	Tax on investment income for 2013 from Part VI, line 5	2a	789.		
b	Income tax for 2013. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	789.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	150,645.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	150,645.
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	150,645.

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	149,600.
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	149,600.
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	789.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	148,811.

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				150,645.
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only				
b Total for prior years 20 11 ,20 10 ,20 09				
3 Excess distributions carryover, if any, to 2013.				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012 15,093.				
f Total of lines 3a through e	15,093.			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ $ 149,600.				
a Applied to 2012, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2013 distributable amount				149,600.
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))*	1,045.			1,045.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	14,048.			
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				
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	14,048.			
10 Analysis of line 9				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012 14,048.				
e Excess from 2013				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) NOT APPLICABLE

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, 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 (a) 2013	Prior 3 years (b) 2012	(c) 2011	(d) 2010	(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					
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).)

RICHARD & SHELLEY KUHLE

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

N/A

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

Check here ▶ [X] 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 address 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 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*				
ATCH 8				
Total ▶ **3a**				147,250.
b *Approved for future payment*				
Total ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	56,918.	
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	43,401.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				100,319.	

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 100,319.

(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)

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

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

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

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
	N/A		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

Signature of officer or trustee: [signature] Date: 9.3.2014 Title: Exec Director

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
VALERIE BALL	Valerie J Ball	8/25/14		P00178114
Firm's name ▶ KPMG LLP			Firm's EIN ▶ 13-5565207	
Firm's address ▶ 60 EAST RIO SALADO PKWY, SUITE 800 TEMPE, AZ 85281-9125			Phone no 480-459-3500	

Schedule B (Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at *www.irs.gov/form990.*

OMB No 1545-0047

2013

Name of the organization	Employer identification number
KUHLE FAMILY FOUNDATION	20-3995755

Organization type (check one)

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor Complete Parts I and II.

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions of $5,000 or more during the year . . . . ▶ $______________

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization KUHLE FAMILY FOUNDATION

Employer identification number 20-3995755

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	KUHLE LIVING TRUST 2425 EAST CAMELBACK ROAD, SUITE 750 PHOENIX, AZ 85016	$ 846,223.	Person [X] Payroll [ ] Noncash [X] (Complete Part II for noncash contributions)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)

Name of organization KUHLE FAMILY FOUNDATION

Employer identification number 20-3995755

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	PUBLICLY TRADED SECURITIES	$ 566,223.	VAR

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

Name of organization KUHLE FAMILY FOUNDATION

Employer identification number 20-3995755

Part III ***Exclusively* religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than $1,000 for the year.** Complete columns **(a)** through **(e)** and the following line entry.

For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **$1,000 or less** for the year. (Enter this information once. See instructions.) ▶ $

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		PUBLICLY TRADED SECURITIES ST				P	VAR	VAR
		PROPERTY TYPE: SECURITIES						
802,480.		759,079.					43,401.	
TOTAL GAIN(LOSS)							43,401.	

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME
DIVIDENDS		56,918.	56,918.	
	TOTAL	56,918.	56,918.	

FORM 990PF, PART I - ACCOUNTING FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
PROFESSIONAL FEES	4,700.	2,350.		2,350.
TOTALS	4,700.	2,350.		2,350.

ATTACHMENT 3

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
BANK SERVICE CHARGES	19,028.	19,028.		
FILING FEES	10.			
TOTALS	19,038.	19,028.		

ATTACHMENT 4

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
MUTUAL FUND PORTFOLIO	3,572,811.	3,572,811.
TOTALS	3,572,811.	3,572,811.

ATTACHMENT 5

FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES

DESCRIPTION		AMOUNT
UNREALIZED GAIN		283,544.
	TOTAL	283,544.

FORM 990PF, PART VII-A, LINE 10 - NEW SUBSTANTIAL CONTRIBUTORS

ATTACHMENT 6

NAME AND ADDRESS

KUHLE LIVING TRUST
2425 EAST CAMELBACK ROAD, SUITE 750
PHOENIX, AZ 85016

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 7

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
RICHARD KUHLE 2425 EAST CAMELBACK ROAD, SUITE 750 PHOENIX, AZ 85016	PRESIDENT 1.00	0	0	0
SHELLEY LOUISE INCH KUHLE 2425 EAST CAMELBACK ROAD, SUITE 750 PHOENIX, AZ 85016	TREASURER 1.00	0	0	0
	GRAND TOTALS	0	0	0

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 8

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ALL SAINTS EPISCOPAL DAY SCHOOL 6300 NORTH CENTRAL AVENUE PHOENIX, AZ 85012	N/A PC	SUPPORT TEACHING ACADEMIC EXCELLENCE AND SOCIAL RESPONSIBILITY DURING EARLY CHILDHOOD AND TO ELEMENTARY SCHOOL CHILDREN.	11,000.
AMERICAN HEART ASSOCIATION 7272 GREENVILLE AVENUE DALLAS, TX 75231	N/A PC	BUILDING HEALTHIER LIVES, FREE OF CARDIOVASCULAR DISEASES AND STROKE.	2,500.
ARIZONA STATE UNIVERSITY FOUNDATION P O. BOX 2260 TEMPLE, AZ 85280	N/A PC	TO MOBILIZE THE ASU COMMUNITY AS AN ENGINE FOR POSITIVE CHANGE THAT, THROUGH PHILANTHROPIC INVESTMENT, WILL MEASURABLY AFFECT SOCIETY'S PRESSING ISSUES.	1,500
BROPHY COLLEGE PREPARATORY 4701 N CENTRAL AVE. PHOENIX, AZ 85012	N/A PC	MEN OF '14 CAMPAIGN	25,000
CROHN'S & COLITIS FOUNDATION OF AMERICA, INC 733 THIRD AVENUE, SUITE 510 NEW YORK, NY 10017	N/A PC	TO CURE CROHN'S DISEASE AND ULCERATIVE COLITIS, AND TO IMPROVE THE QUALITY OF LIFE OF CHILDREN AND ADULTS AFFECTED BY THESE DISEASES	3,000
HEARD MUSEUM 2301 N CENTRAL AVE PHOENIX, AZ 85004	N/A PC	TO EDUCATE THE GENERAL PUBLIC ABOUT ARTS AND CULTURE OF AMERICAN INDIANS, WITH A FOCUS ON TRIBES OF THE SOUTHWEST USA	1,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 8 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
HOMEWARD BOUND 2302 W COLTER STREET PHOENIX, AZ 85015	N/A PC	ASSIST THOSE FAMILIES IN THE METROPOLITAN PHOENIX AREA THAT ARE HOMELESS, WORKING POOR AND/OR HAVE EXPERIENCED DOMESTIC VIOLENCE	2,000
MARCH TO THE TOP OF AFRICA RELIEF FUND 20300 VENTURA BLVD. NO 160 WOODLAND HILLS, CA 91364	N/A PC	TO PROVIDE AID AND OTHER MUCH NEEDED RESOURCES TO IMPOVERISHED FAMILIES WORLDWIDE	5,000
PHOENIX CHILDREN'S HOSPITAL FOUNDATION 1919 E. THOMAS ROAD PHOENIX, AZ 85016	N/A PC	PROVIDE FUNDING TO SUPPORT MEDICAL SERVICES AT PHOENIX CHILDREN'S HOSPITAL	76,000
THE CAEPE SCHOOL 42212 N 41ST DRIVE ANTHEM, AZ 85086	N/A PC	TO SUPPORT EDUCATION	250
VALLEY OF THE SUN UNITED WAY 1515 EAST OSBORN PHOENIX, AZ 85014	N/A PC	IMPROVING LIVES BY MOBILIZING THE CARING POWER OF OUR COMMUNITY	20,000
		TOTAL CONTRIBUTIONS PAID	147,250

Your assets

Some prices, income and current values shown may be approximate. As a result, gains and losses may not be accurately reflected. See *Important information about your statement* at the end of this document for more information

Cash

Cash and money balances

Cash and money balances may include available cash balances, UBS Bank USA deposit account balances, UBS AG Stamford Branch deposit account balances and money market mutual fund sweep balances

UBS Bank USA deposit account balances are insured by the FDIC within applicable limits, but are not protected by SIPC. UBS AG Stamford Branch deposit account balances are not insured by FDIC and are not protected by SIPC Money market sweep balances are protected by SIPC but are not insured by the FDIC See the *Important information about your statement* at the end of this document for details about those balances

Holding	Opening balance on Dec 1 ($)	Closing balance on Dec 31 ($)	Price per share on Dec 31 ($)	Average rate	Dividend/Interest period	Days in period	Cap amount ($)
RMA MONEY MKT. PORTFOLIO	0.00	173,278 60	1 00	0 01%	Nov 22 to Dec 23	32	
UBS BANK USA BUS ACCT	211,405.32	250,000 00					250,000.00
Total	**$211,405.32**	**$423,278.60**					

Equities

Common stock

Holding	Trade date	Number of shares	Purchase price/ Average price per share ($)	Cost basis ($)	Price per share on Dec 31 ($)	Value on Dec 31 ($)	Unrealized gain or loss ($)	Holding period
BHP BILLITON LTD SPON ADR								
Symbol BHP Exchange: NYSE								
EAI $2,320 Current yield 3.40%	May 9, 13	600.000	70 587	42,352 56	68.200	40,920.00	-1,432 56	ST
	May 16, 13	400 000	67 294	26,917.60	68.200	27,280 00	362 40	ST
Security total		1,000 000	69 270	69,270.16		68,200.00	-1,070.16	
BLACKSTONE MTG TR INC REIT								
Symbol BXMT Exchange NYSE								
EAI $1,800 Current yield. 6.63%	Nov 4, 13	502 000	24.645	12,372 06	27 130	13,619.26	1,247.20	ST
	Nov 4, 13	498.000	24 747	12,324.36	27.130	13,510.74	1,186.38	ST
Security total		1,000 000	24.696	24,696 42		27,130.00	2,433 58	

continued next page

Holding	Trade date	Number of shares	Purchase price/ Average price per share ($)	Cost basis ($)	Price per share on Dec 31 ($)	Value on Dec 31 ($)	Unrealized gain or loss ($)	Holding period
CAMERON INTL CORP								
Symbol. CAM Exchange NYSE	Apr 29, 13	800 000	61 566	49,252.80	59 530	47,624 00	-1,628 80	ST
CITIGROUP INC								
Symbol, C Exchange NYSE								
EAI $60 Current yield 0.08%	Mar 27, 13	1,000 000	44 608	44,608 50	52.110	52,110 00	7,501.50	ST
	Apr 11, 13	500 000	45 440	22,720.00	52 110	26,055 00	3,335 00	ST
Security total		1,500 000	44 886	67,328 50		78,165 00	10,836 50	
FORD MOTOR CO COM NEW								
Symbol F Exchange. NYSE								
EAI $2,000 Current yield 2.59%	Apr 24, 13	3,000 000	13 313	39,939 00	15 430	46,290 00	6,351 00	ST
	Oct 11, 13	2,000 000	17 099	34,199 91	15 430	30,860 00	-3,339 91	ST
Security total		5,000.000	14 828	74,138 91		77,150.00	3,011.09	
FREEPORT-MCMORAN COPPER & GOLD INC								
Symbol. FCX Exchange: NYSE								
EAI $2,250 Current yield 3.31%	May 9, 13	1,000 000	33 099	33,099 90	37.740	37,740 00	4,640.10	ST
	May 15, 13	800 000	31.969	25,575 44	37.740	30,192.00	4,616.56	ST
Security total		1,800 000	32 597	58,675 34		67,932 00	9,256.66	
GENERAL MOTORS CO								
Symbol GM Exchange NYSE	Apr 10, 13	1,000 000	28 366	28,366 50	40 870	40,870.00	12,503.50	ST
	Apr 12, 13	1,500.000	29 779	44,669 85	40 870	61,305 00	16,635.15	ST
Security total		2,500 000	29 215	73,036 35		102,175.00	29,138.65	
GENL ELECTRIC CO								
Symbol: GE Exchange: NYSE								
EAI $1,760 Current yield 3.14%	Mar 27, 13	2,000 000	23 083	46,166 00	28 030	56,060.00	9,894.00	ST
INTEL CORP								
Symbol: INTC Exchange: OTC								
EAI $900 Current yield. 3 47%	Apr 18, 13	1,000 000	22 287	22,287.00	25.955	25,955.00	3,668.00	ST
JPMORGAN CHASE & CO								
Symbol JPM Exchange NYSE								
EAI $1,520 Current yield 2.60%	Apr 10, 13	1,000 000	49 253	49,253.42	58 480	58,480 00	9,226 58	ST
MERCK & CO INC NEW COM								
Symbol MRK Exchange: NYSE								
EAI $1,760 Current yield 3 52%	Jun 26, 13	1,000.000	46 350	46,350 31	50 050	50,050.00	3,699 69	ST

continued next page

Holding	Trade date	Number of shares	Purchase price/ Average price per share ($)	Cost basis ($)	Price per share on Dec 31 ($)	Value on Dec 31 ($)	Unrealized gain or loss ($)	Holding period
SYMANTEC CORP								
Symbol SYMC Exchange. OTC								
EAI $1,800 Current yield 2 54%	May 9, 13	2,000 000	24 273	48,546 00	23.580	47,160 00	-1,386 00	ST
	Jun 7, 13	1,000.000	22 110	22,110 00	23 580	23,580 00	1,470 00	ST
Security total		3,000.000	23 552	70,656 00		70,740 00	84 00	
UNITEDHEALTH GROUP INC								
Symbol UNH Exchange: NYSE								
EAI $1,120 Current yield: 1.49%	Apr 25, 13	1,000 000	58 847	58,847 10	75.300	75,300 00	16,452.90	ST
ZOETIS INC								
Symbol ZTS Exchange NYSE								
EAI $432 Current yield: 0.88%	Jul 25, 13	1,000 000	30.298	30,298.64	32 690	32,690.00	2,391 36	ST
	Aug 6, 13	500.000	31 550	15,775.00	32 690	16,345.00	570.00	ST
Security total		1,500 000	30 716	46,073 64		49,035 00	2,961 36	
Total				**$756,031.95**		**$853,996.00**	**$97,964.05**	

Total estimated annual income: $17.722

Closed end funds & Exchange traded products

Total reinvested is the total of all reinvested dividends it does not include any cash dividends It is not a tax lot for the purposes of determining holding periods or cost basis The shares you receive each time you reinvest dividends become a separate tax lot

Cost basis is the total purchase cost of the security, including reinvested dividends. The cost basis may need to be adjusted for return of capital payments in order to determine the adjusted cost basis for tax reporting purposes

Unrealized (tax) gain or loss is the difference between the current value and the cost basis and would generally be your taxable gain or loss if the security was sold on this date The unrealized (tax) gain or loss may need to be adjusted for return of capital payments in order to determine the realized gain or loss for tax reporting purposes

Investment return is the current value minus the amount you invested. It does not include shares that are not reflected on your statement, including shares that have been realized as either a gain or a loss It also does not include cash dividends that were not reinvested

Holding	Number of shares	Purchase price/ Average price per share ($)	Client investment ($)	Cost basis ($)	Price per share on Dec 31 ($)	Value on Dec 31 ($)	Unrealized (tax) gain or loss ($)	Investment return ($)	Holding period
FIRST TR EXCHANGE TRADED FD									
AMEX BIOTECHNOLOY INDEX FUNE									
Symbol FBT									
Trade date Feb 27, 13	250.000	50 237	12,559 37	12,559.37	69 180	17,295 00	4,735.63	4,735.63	ST
ISHARES TRUST S&P GLOBAL									
HEALTHCARE SECTOR INDEX FUND									
Symbol IXJ									
Trade date Feb 21, 13	500 000	69.025	34,512 74	34,512.74	86 100	43,050.00	8,537 26		ST

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Holding	Number of shares	Purchase price/ Average price per share ($)	Client investment ($)	Cost basis ($)	Price per share on Dec 31 ($)	Value on Dec 31 ($)	Unrealized (tax) gain or loss ($)	Investment return ($)	Holding period
Trade date. Feb 27, 13	500.000	69 693	34,846.76	34,846.76	86 100	43,050 00	8,203 24		ST
EAI· $1,298 Current yield 1 51%									
Security total	1,000.000	69.360	69,359 50	69,359 50		86,100 00	16,740 50	16,740 50	
ISHARES TRUST S&P GLOBAL									
INDUSTRIALS INDEX FUND									
Symbol. EXI									
Trade date: Feb 21, 13	500 000	57.654	28,827.25	28,827.25	71 410	35,705 00	6,877.75		ST
Trade date: Feb 27, 13	500.000	58 304	29,152.20	29,152 20	71 410	35,705.00	6,552.80		ST
EAI: $1,079 Current yield 1.51%									
Security total	1,000 000	57 979	57,979.45	57,979 45		71,410.00	13,430.55	13,430 55	
MARKET VECTORS ETF TR AFRICA									
ETF									
Symbol AFK									
Trade date Oct 28, 13	400 000	31 840	12,736.00	12,736.00	30 920	12,368 00	-368 00	-368.00	ST
EAI $332 Current yield 2 68%									
MARKET VECTORS ETF TR OIL SVCS									
ETF									
Symbol. OIH									
Trade date: Feb 12, 13	600.000	43 306	25,983 90	25,983 90	48.070	28,842 00	2,858 10		ST
Trade date. Feb 14, 13	600.000	44.830	26,898.00	26,898 00	48.070	28,842 00	1,944 00		ST
Trade date: Feb 26, 13	300 000	42.270	12,681.00	12,681.00	48 070	14,421.00	1,740.00		ST
Trade date: Feb 27, 13	250 000	42.837	10,709 44	10,709 44	48 070	12,017 50	1,308 06		ST
EAI· $949 Current yield 1 13%									
Security total	1,750.000	43 584	76,272.34	76,272.34		84,122.50	7,850 16	7,850 16	
POWERSHARES WATER RESOURCES									
PORTFOLIO									
Symbol: PHO									
Trade date. Jun 10, 13	2,000.000	22.680	45,360 00	45,360.00	26 220	52,440.00	7,080.00	7,080 00	ST
EAI· $256 Current yield 0 49%									
POWERSHARES BUYB ACHIEVERS									
Symbol PKW									

continued next page

Holding	Number of shares	Purchase price/ Average price per share ($)	Client investment ($)	Cost basis ($)	Price per share on Dec 31 ($)	Value on Dec 31 ($)	Unrealized (tax) gain or loss ($)	Investment return ($)	Holding period
Trade date: May 6, 13	700.000	35 430	24,801 00	24,801 00	43.080	30,156 00	5,355 00	5,355 00	ST
EAI $187 Current yield. 0.62%									
SPDR INDEX SHS FDS EURO STOXX 50 ETF									
Symbol: FEZ									
Trade date: Feb 21, 13	1,000.000	33 512	33,512 50	33,512 50	42 200	42,200.00	8,687 50		ST
Trade date: Feb 27, 13	500.000	33 757	16,878 92	16,878.92	42.200	21,100.00	4,221 08		ST
Trade date: Apr 25, 13	1,000.000	34 636	34,636.00	34,636 00	42 200	42,200.00	7,564.00		ST
Trade date: May 7, 13	2,000 000	35 950	71,900 00	71,900 00	42 200	84,400.00	12,500 00		ST
EAI $5,175 Current yield: 2.73%									
Security total	4,500 000	34.873	156,927.42	156,927.42		189,900.00	32,972.58	32,972 58	
SPDR INDEX SHS FDS S&P EM MKT DIV									
Symbol EDIV									
Trade date: Mar 15, 13	1,500 000	45.712	68,568 45	68,568.45	39.060	58,590.00	-9,978 45	-9,978 45	ST
EAI: $3,005 Current yield 5.13%									
SPDR METALS & MINING ETF									
Symbol XME									
Trade date May 21, 13	2,000 000	38 979	77,959.80	77,959.80	42 080	84,160 00	6,200 20	6,200.20	ST
EAI $1,110 Current yield. 1 32%									
SPDR S&P SEMICONDUCTOR ETF									
Symbol: XSD									
Trade date: Feb 8, 13	700 000	49 086	34,360.47	34,360 47	61.110	42,777.00	8,416 53		ST
Trade date. Feb 27, 13	300.000	48 533	14,559 99	14,559.99	61.110	18,333.00	3,773.01		ST
Trade date. Mar 7, 13	750 000	48 582	36,436 58	36,436.58	61.110	45,832 50	9,395 92		ST
EAI $557 Current yield 0.52%									
Security total	1,750.000	48.775	85,357 04	85,357 04		106,942.50	21,585 46	21,585.46	
SPDR S&P CHINA ETF									
Symbol: GXC									
Trade date Feb 8, 13	500 000	74 292	37,146.25	37,146 25	77 930	38,965.00	1,818 75		ST
Trade date: Feb 21, 13	500 000	71 633	35,816.75	35,816 75	77 930	38,965.00	3,148 25		ST

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Holding	Number of shares	Purchase price/ Average price per share ($)	Client investment ($)	Cost basis ($)	Price per share on Dec 31 ($)	Value on Dec 31 ($)	Unrealized (tax) gain or loss ($)	Investment return ($)	Holding period
EAI $1,782 Current yield. 2.29%									
Security total	1,000.000	72 963	72,963 00	72,963 00		77,930 00	4,967.00	4,967 00	
SPDR SERIES TRUST HLTH CARE									
SVCS									
Symbol: XHS									
Trade date Feb 26, 13	500.000	71 430	35,715 00	35,715.00	90 638	45,319 00	9,604 00		ST
Trade date Feb 27, 13	500 000	72.285	36,142 60	36,142.60	90.638	45,319 00	9,176 40		ST
EAI $421 Current yield. 0.46%									
Security total	1,000.000	71.858	71,857 60	71,857.60		90,638 00	18,780.40	18,780 40	
TECHNOLOGY SECTOR SPDR TRUST									
SHS									
Symbol: XLK									
Trade date: Feb 21, 13	1,000.000	29.379	29,379.97	29,379.97	35.740	35,740.00	6,360 03		ST
Trade date: Feb 27, 13	1,000.000	29.727	29,727.30	29,727.30	35.740	35,740 00	6,012.70		ST
Trade date: Apr 10, 13	1,000 000	30 557	30,557 13	30,557.13	35.740	35,740 00	5,182 87		ST
EAI $1,827 Current yield. 1 70%									
Security total	3,000 000	29 888	89,664 40	89,664.40		107,220.00	17,555 60	17,555 60	
VANGUARD SECTOR INDEX FD									
INFORMATION TECH ETF									
Symbol VGT									
Trade date: Feb 12, 13	500 000	71.846	35,923 00	35,923.00	89.540	44,770.00	8,847 00		ST
Trade date: Feb 27, 13	500 000	71.314	35,657.00	35,657.00	89 540	44,770 00	9,113 00		ST
Trade date. Apr 10, 13	500.000	73 045	36,522 97	36,522.97	89.540	44,770 00	8,247 03		ST
EAI. $1,416 Current yield: 1.05%									
Security total	1,500.000	72 069	108,102.97	108,102.97		134,310 00	26,207 03	26,207.03	
VANGUARD FTSE EUROPE ETF									
Symbol. VGK									
Trade date: Oct 22, 13	400 000	57.360	22,944 00	22,944.00	58 800	23,520 00	576 00	576 00	ST
EAI $652 Current yield 2.77%									
WISDOMTREE TRUST JAPAN HEDGED									
EQUITY FD									

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Holding	Number of shares	Purchase price/ Average price per share ($)	Client investment ($)	Cost basis ($)	Price per share on Dec 31 ($)	Value on Dec 31 ($)	Unrealized (tax) gain or loss ($)	Investment return ($)	Holding period
Symbol: DXJ									
Trade date: Jun 5, 13	1,000.000	44.736	44,736 50	44,736 50	50 840	50,840.00	6,103.50		ST
Trade date Jun 6, 13	500.000	42.996	21,498 25	21,498 25	50.840	25,420 00	3,921.75		ST
EAI: $927 Current yield 1 22%									
Security total	1,500 000	44 157	66,234 75	66,234.75		76,260 00	10,025.25	10,025 25	
Total			**$1,119,647.09**	**$1,119,647.09**		**$1,303,362.00**	**$183,714.91**	**$183,714.91**	

Total estimated annual income: $20,973

Mutual funds

Total reinvested is the total of all reinvested dividends. It does not include any cash dividends. It is not a tax lot for the purposes of determining holding periods or cost basis. The shares you receive each time you reinvest dividends become a separate tax lot.

Cost basis is the total purchase cost of the security, including reinvested dividends. The cost basis may need to be adjusted for return of capital payments in order to determine the adjusted cost basis for tax reporting purposes.

Unrealized (tax) gain or loss is the difference between the current value and the cost basis and would generally be your taxable gain or loss if the security was sold on this date. The unrealized (tax) gain or loss may need to be adjusted for return of capital payments in order to determine the realized gain or loss for tax reporting purposes.

Investment return is the current value minus the amount you invested. It does not include shares that are not reflected on your statement, including shares that have been realized as either a gain or a loss. It also does not include cash dividends that were not reinvested.

Holding	Number of shares	Purchase price/ Average price per share ($)	Client investment ($)	Cost basis ($)	Price per share on Dec 31 ($)	Value on Dec 31 ($)	Unrealized (tax) gain or loss ($)	Investment return ($)	Holding period
AMERICAN FUNDS NEW ECONOMY F-1									
Symbol: ANFFX									
Trade date: Dec 19, 08	13,090.569	15.736	206,000 00	206,000 00	38.260	500,845.14	294,845.14		LT
Total reinvested	928 209	24 358		22,610.20	38 260	35,513 26	12,903 06		
EAI $2,285 Current yield 0 43%									
Security total	14,018.777	16 307	206,000.00	228,610 20		536,358 40	307,748.20	330,358 40	
AMERICAN FUNDS GROWTH FUND OF AMERICA CLASS A									
Symbol: AGTHX									
Trade date: Dec 19, 08	750 000	20 460	15,345 00	15,345 00	43.000	32,250.00	16,905 00	16,905.00	LT
BRANDES INTERNATIONAL SMALL CAP EQUITY FUND CLASS A									
Symbol BISAX									

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Holding	Number of shares	Purchase price/ Average price per share ($)	Client investment ($)	Cost basis ($)	Price per share on Dec 31 ($)	Value on Dec 31 ($)	Unrealized (tax) gain or loss ($)	Investment return ($)	Holding period
Trade date Feb 27, 13	2,899 729	11 879	34,448 78	34,448 78	13 070	37,899 46	3,450 68		ST
Trade date Apr 18, 13	4,222.973	11 839	50,000.00	50,000 00	13.070	55,194 25	5,194 25		ST
Total reinvested	534 189	13.093		6,994.58	13 070	6,981 85	-12 73		
EAI $720 Current yield 0.72%									
Security total	7,656 891	11 943	84,448.78	91,443.36		100,075.56	8,632.20	15,626 78	
EAGLE SMALL CAP GROWTH									
FUND CLASS A									
Symbol HRSCX									
Trade date Jul 15, 13	1,000 000	51.110	51,110.00	51,110 00	56.700	56,699 99	5,589 99		ST
Total reinvested	12.591	54 830		690 37	56 700	713 91	23.54		
Security total	1,012 591	51 156	51,110.00	51,800 37		57,413 90	5,613 53	6,303 90	
JP MORGAN EMERGING									
MARKETS CLASS A									
Symbol JFAMX									
Trade date Feb 21, 13	3,216 123	23 320	75,000 00	75,000 00	22 120	71,140 64	-3,859 36		ST
Trade date Feb 27, 13	2,136.752	23.400	50,000 00	50,000.00	22.120	47,264 95	-2,735 05		ST
Trade date Mar 13, 13	2,147.766	23.280	50,000 00	50,000 00	22.120	47,508 58	-2,491.42		ST
Total reinvested	26 040	21.789		567 41	22.120	576 00	8.59		
EAI $572 Current yield 0 34%									
Security total	7,526.681	23.326	175,000 00	175,567 41		166,490 18	-9,077.24	-8,509 83	
KINETICS SMALL CAP									
OPPORTUNITIES FUND CLASS									
A									
Symbol KSOAX									
Trade date Oct 28, 13	400 000	37.370	14,948 00	14,948.00	39.390	15,756 00	808.00	808 00	ST
Total			**$546,851.78**	**$577,714.34**		**$908,344.04**	**$330,629.69**	**$361,492.26**	

Total estimated annual income: $3,577

Fixed income

Mutual funds

Total reinvested is the total of all reinvested dividends. It does not include any cash dividends. It is not a tax lot for the purposes of determining holding periods or cost basis. The shares you receive each time you reinvest dividends become a separate tax lot.

Cost basis is the total purchase cost of the security, including reinvested dividends. The cost basis may need to be adjusted for return of capital payments in order to determine the adjusted cost basis for tax reporting purposes.

Unrealized (tax) gain or loss is the difference between the current value and the cost basis and would generally be your taxable gain or loss if the security was sold on this date. The unrealized (tax) gain or loss may need to be adjusted for return of capital payments in order to determine the realized gain or loss for tax reporting purposes.

Investment return is the current value minus the amount you invested. It does not include shares that are not reflected on your statement, including shares that have been realized as either a gain or a loss. It also does not include cash dividends that were not reinvested.

Holding	Number of shares	Purchase price/ Average price per share ($)	Client investment ($)	Cost basis ($)	Price per share on Dec 31 ($)	Value on Dec 31 ($)	Unrealized (tax) gain or loss ($)	Investment return ($)	Holding period
GOLDMAN SACHS STRATEGIC									
INCOME CL A									
Symbol GSZAX									
Trade date Feb 7, 13	9,569 378	10.449	100,000.00	100,000.00	10.660	102,009.57	2,009.57		ST
Trade date Feb 27, 13	9,587 728	10.429	100,000.00	100,000 00	10 660	102,205.18	2,205 18		ST
Total reinvested	393 562	10 529		4,143.95	10 660	4,195 37	51.42		
EAI $7,390 Current yield: 3 55%									
Security total	19,550 668	10.442	200,000.00	204,143 95		208,410 12	4,266.17	8,410.12	
NUVEEN HIGH YIELD									
MUNICIPAL BOND FUND									
CLASS A									
Symbol NHMAX									
Trade date Feb 7, 13	11,547 344	17.320	200,000 00	200,000.00	15 360	177,367.20	-22,632 80		ST
Total reinvested	586 485	16.111		9,449 26	15 360	9,008 41	-440.85		
EAI $11,843 Current yield: 6.35%									
Security total	12,133 829	17.262	200,000 00	209,449 26		186,375 61	-23,073.65	-13,624.39	
Total			**$400,000.00**	**$413,593.21**		**$394,785.73**	**-$18,807.48**	**-$5,214.27**	

Total estimated annual income: $19,233

Non-traditional

Mutual funds

Total reinvested is the total of all reinvested dividends It does not include any cash dividends It is not a tax lot for the purposes of determining holding periods or cost basis The shares you receive each time you reinvest dividends become a separate tax lot.

Cost basis is the total purchase cost of the security, including reinvested dividends. The cost basis may need to be adjusted for return of capital payments in order to determine the adjusted cost basis for tax reporting purposes

Unrealized (tax) gain or loss is the difference between the current value and the cost basis and would generally be your taxable gain or loss if the security was sold on this date. The unrealized (tax) gain or loss may need to be adjusted for return of capital payments in order to determine the realized gain or loss for tax reporting purposes

Investment return is the current value minus the amount you invested. It does not include shares that are not reflected on your statement, including shares that have been realized as either a gain or a loss It also does not include cash dividends that were not reinvested

Holding	Number of shares	Purchase price/ Average price per share ($)	Client investment ($)	Cost basis ($)	Price per share on Dec 31 ($)	Value on Dec 31 ($)	Unrealized (tax) gain or loss ($)	Investment return ($)	Holding period
MAINSTAY MARKETFIELD									
FUND CLASS I									
Symbol MFLDX									
Trade date Feb 7, 13	6,064 281	16 490	100,000 00	100,000 00	18.520	112,310 48	12,310 48		ST
Total reinvested	0 711	18 045		12 83	18 520	13 17	0.34		
EAI $12 Current yield: 0.01%									
Security total	6,064 992	16 490	100,000 00	100,012 83		112,323.65	12,310.82	12,323.65	

Your total assets

		Value on Dec 31 ($)	Percentage of your account	Cost basis ($)	Estimated annual income ($)	Unrealized gain or loss ($)
Cash	**Cash and money balances**	**423,278.60**	**10.59%**	**423,278.60**		
Equities	Common stock	853,996 00		756,031 95	17,722.00	97,964 05
	Closed end funds & Exchange traded products	1,303,362 00		1,119,647 09	20,973.00	183,714 91
	Mutual funds	908,344 04		577,714 34	3,577 00	330,629 69
	Total equities	**3,065,702.04**	**76.72%**	**2,453,393.38**	**42,272.00**	**612,308.65**
Fixed income	**Mutual funds**	**394,785.73**	**9.88%**	**413,593.21**	**19,233.00**	**-18,807.48**
Non-traditional	**Mutual funds**	**112,323.65**	**2.81%**	**100,012.83**	**12.00**	**12,310.82**
Total		**$3,996,090.02**	**100.00%**	**$3,390,278.02**	**$61,517.00**	**$605,811.99**

Form **8868** (Rev January 2014) Department of the Treasury Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ File a separate application for each return.
▶ Information about Form 8868 and its instructions is at www.irs.gov/form8868.

OMB No 1545-1709

- 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* and click on *e-file for Charities & Nonprofits*

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

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

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

Enter filer's identifying number, see instructions

Type or print	Name of exempt organization or other filer, see instructions KUHLE FAMILY FOUNDATION	Employer identification number (EIN) or 20-3995755
File by the due date for filing your return See instructions	Number, street, and room or suite no If a P O box, see instructions 2425 EAST CAMELBACK ROAD, SUITE 750	Social security number (SSN)
	City, town or post office, state, and ZIP code For a foreign address, see instructions PHOENIX, AZ 85016	

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 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ▶ THE FOUNDATION

Telephone No. ▶ 602 866-0900 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 08/15, 20 14, to file the exempt organization return for the organization named above The extension is for the organization's return for:
▶ [X] calendar year 20 13 or
▶ [ ] tax year beginning ______, 20__, and ending ______, 20__

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

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	$ 7,260.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made Include any prior year overpayment allowed as a credit.	3b	$ 7,260.
c	**Balance due.** Subtract line 3b from line 3a Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	$ 0

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

For Privacy Act and Paperwork Reduction Act Notice, see Instructions. Form **8868** (Rev 1-2014)

JSA
3F8054 2 000

• If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** and check this box . . . . ▶ [X]

Note. Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

• If you are filing for an **Automatic 3-Month Extension, complete only Part I** (on page 1).

Part II Additional (Not Automatic) 3-Month Extension of Time. Only file the original (no copies needed).

Enter filer's identifying number, see instructions

Type or print	Name of exempt organization or other filer, see instructions KUHLE FAMILY FOUNDATION	Employer identification number (EIN) or 20-3995755
File by the due date for filing your return See instructions	Number, street, and room or suite no If a P O box, see instructions 2425 EAST CAMELBACK ROAD, SUITE 750	Social security number (SSN)
	City, town or post office, state, and ZIP code For a foreign address, see instructions PHOENIX, AZ 85016	

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

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

STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.

• The books are in the care of ▶ THE FOUNDATION

Telephone No. ▶ 602 866-0900 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

4 I request an additional 3-month extension of time until 11/17 , 20 14

5 For calendar year 2013 , or other tax year beginning ______ , 20 ___ , and ending ______ , 20 ___ .

6 If the tax year entered in line 5 is for less than 12 months, check reason: [ ] Initial return [ ] Final return [ ] Change in accounting period

7 State in detail why you need the extension INFORMATION NECESSARTY TO PREPARE A COMPLETE AND ACCURATE RETURN IS NOT YET AVAILABLE.

8a	If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions	**8a**	$ 7,260.
b	If this application is for Forms 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 and any amount paid previously with Form 8868.	**8b**	$ 7,260.
c	**Balance Due.** Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	**8c**	$ 0

Signature and Verification must be completed for Part II only.

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form

Signature ▶ Melinda Patton Title ▶ CPA Date ▶ 8/11/2014