



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



Form **990-PF****Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2013

Open to Public Inspection

Department of the Treasury
Internal Revenue Service▶ 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.

For calendar year 2013 or tax year beginning , and ending

Name of foundation STUCKI FAMILY FOUNDATION C/O GREENLEAF TRUST		A Employer identification number 38-3385788
Number and street (or P O box number if mail is not delivered to street address) 211 SOUTH ROSE STREET	Room/suite	B Telephone number (see instructions) 269-388-9800
City or town, state or province, country, and ZIP or foreign postal code KALAMAZOO MI 49007		C If exemption application is pending, check here ▶ <input type="checkbox"/>
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1 Foreign organizations, check here ▶ <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation ▶ <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 511,942	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (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 <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	2,387	2,387		
	4 Dividends and interest from securities	6,895	6,895		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	20,792			
	b Gross sales price for all assets on line 6a 117,760				
	7 Capital gain net income (from Part IV, line 2)		20,792		
	8 Net short-term capital gain			0	
	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)				
	12 Total. Add lines 1 through 11	30,074	30,074	0	
	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule) SEE STMT 1	20			
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule) STMT 2	3,099	3,099		
	17 Interest				
	18 Taxes (attach schedule) (see instructions) STMT 3	400			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	66			66
	22 Printing and publications				
	23 Other expenses (att sch) STMT 4	272			
	24 Total operating and administrative expenses. Add lines 13 through 23	3,857	3,099	0	66
	25 Contributions, gifts, grants paid	40,900			40,900
	26 Total expenses and disbursements. Add lines 24 and 25	44,757	3,099	0	40,966
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-14,683			
	b Net investment income (if negative, enter -0-)		26,975		
	c Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2013)

DAA

/5

Form 990-PF (2013) **STUCKI FAMILY FOUNDATION****38-3385788**Page **2**

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		93,551	85,273	85,273
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶	52			
		Less allowance for doubtful accounts ▶		365	52	52
	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 (att schedule) ▶				
		Less allowance for doubtful accounts ▶	0			
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments – U.S. and state government obligations (attach schedule) STMT 5		29,985	45,275	42,851
	b	Investments – corporate stock (attach schedule) SEE STMT 6		200,516	200,959	248,198
	c	Investments – corporate bonds (attach schedule) SEE STMT 7		159,724	136,452	135,568
	11	Investments – land, buildings, and equipment basis ▶				
		Less accumulated depreciation (attach sch) ▶				
	12	Investments – mortgage loans				
	13	Investments – other (attach schedule)				
	14	Land, buildings, and equipment basis ▶				
		Less accumulated depreciation (attach sch) ▶				
	15	Other assets (describe ▶))			
	16	Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)		484,141	468,011	511,942
Liabilities	17	Accounts payable and accrued expenses		1,447		
	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)		1,447	0	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>				
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>				
	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		482,694	468,011	
	30	Total net assets or fund balances (see instructions)		482,694	468,011	
	31	Total liabilities and net assets/fund balances (see instructions)		484,141	468,011	

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	482,694
2	Enter amount from Part I, line 27a	2	-14,683
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	468,011
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	468,011

Form **990-PF** (2013)

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 ATTACHED - LT GREENLEAF (022)	P	VARIOUS	VARIOUS
b SEE ATTACHED - ST GREENLEAF (022)	P	08/30/12	07/26/13
c CAPITAL GAIN DIVIDENDS - GLT			
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 93,113		90,468	2,645
b 7,572		6,500	1,072
c 17,075			17,075
d			
e			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			2,645
b			1,072
c			17,075
d			
e			

2 Capital gain net income or (net capital loss)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	2	20,792
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)		3	1,072
If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8			

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	47,549	506,454	0.093886
2011	35,539	277,293	0.128164
2010	11,838	177,744	0.066601
2009	11,162	173,690	0.064264
2008	12,473	196,167	0.063584

2 Total of line 1, column (d)	2	0.416499
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	0.083300
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	493,154
5 Multiply line 4 by line 3	5	41,080
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	270
7 Add lines 5 and 6	7	41,350
8 Enter qualifying distributions from Part XII, line 4	8	40,966

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	540
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	0
3	Add lines 1 and 2	3	540
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	540
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	447
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	447
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	93
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2014 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

Part VII-A Statements Regarding Activities

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

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► GREENLEAF TRUST 211 SOUTH ROSE STREET Located at ► KALAMAZOO MI ZIP+4 ► 49007 Telephone no ► 269-388-9800			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – Check here and enter the amount of tax-exempt interest received or accrued during the year	15		
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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country ►	16	Yes	No X

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly)		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here N/A <input type="checkbox"/>	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? N/A	1c	
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 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 <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement – see instructions) N/A	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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) N/A	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 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)? **N/A** ☐ **5b**

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

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

If "Yes," attach the statement required by Regulations section 53.4945–5(d)

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

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

If "Yes" to 6b, file Form 8870

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

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **N/A** **7b**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation** (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
MARCIA V. STUCKI 2088 S. 36TH ST.	GALESBURG MI 49053-9643	PRESIDENT 1.00	0	0
HEIDI E. STUCKI 1643 S. 36TH ST.	GALESBURG MI 49053	SECRETARY/TR 1.00	0	0
J. CHRISTOPHER STUCKI 1326 WASHINGTON ST.	EVANSTON IL 60202	V-PRESIDENT 1.00	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

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
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 N/A	
2	
All other program-related investments. See instructions.	
3	
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	422,362
b	Average of monthly cash balances	1b	78,302
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	500,664
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	500,664
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	7,510
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	493,154
6	Minimum investment return. Enter 5% of line 5	6	24,658

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	24,658
2a	Tax on investment income for 2013 from Part VI, line 5	2a	540
b	Income tax for 2013 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	540
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	24,118
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	24,118
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	24,118

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	1a	40,966
b	Program-related investments – total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	40,966
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	40,966

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				24,118
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008	2,709			
b From 2009	2,493			
c From 2010	2,975			
d From 2011	21,796			
e From 2012	22,510			
f Total of lines 3a through e	52,483			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 40,966				
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				24,118
e Remaining amount distributed out of corpus	16,848			
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	69,331			
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				0
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)	2,709			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	66,622			
10 Analysis of line 9				
a Excess from 2009	2,493			
b Excess from 2010	2,975			
c Excess from 2011	21,796			
d Excess from 2012	22,510			
e Excess from 2013	16,848			

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

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

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest
NONE

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

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed
N/A

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

c Any submission deadlines
N/A

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

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE STATEMENT 8				<p style="text-align: right;">40,900</p>
Total			▶ 3a	40,900
b Approved for future payment N/A				
Total			▶ 3b	

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

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

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[illegible]

- 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
N/A		

**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.

May the IRS discuss this return with the preparer shown below (see instructions)? ☒ Yes

Signature of officer or trustee

Date _____

Title

Paid
Preparer
Use Only

Print/Type preparer's name

Preparer's signature

Date _____

Check ☐ if self-employed

JAMES R. VALK

JAMES R. VALK

05/09/14

Firm's name ▶

JANSEN VALK THOMPSON & REAHM PC

PTIN

Firm's address ►

7171 STADIUM DR
KALAMAZOO, MI 49009-4943

Firm's EIN ►

Phone no **269-381-7600**Form **990-PF** (2013)

Tax Worksheet

(01/01/2013 To 12/31/2013)

Tax ID : XX-XXX5788

Account Name: Stucki Family Foundation

Account Number : 20050022

State of Domicile : Michigan

Generation Skipping : N/A

Administrator : Carlene R Korchak

Accountant : James R Valk

Jansen Valk Thompson Reahm PC

Kalamazoo MI 49009-4943

* * Schedule D * *

Shares/PV	Asset Sold	Date Acquired	How Acq	Date Sold	Holding Period	Sales Proceeds	Original Cost	Realized Gain/ Loss
214.450	Columbia Acorn Fund Cl Z 197199409	08/30/2012	P	07/26/2013	Short	7,572.27	6,500.00	1,072.27
57.960	Columbia Acorn Fund Cl Z 197199409	11/05/2004	P	07/26/2013	Long	2,046.50	1,494.16	552.34
33.410	Columbia Acorn Fund Cl Z 197199409	01/30/2012	P	07/26/2013	Long	1,179.74	1,000.00	179.74
31.600	Columbia Acorn Fund Cl Z 197199409	03/23/2012	P	07/26/2013	Long	1,115.65	1,000.00	115.65
33.910	Columbia Acorn Fund Cl Z 197199409	05/30/2012	P	07/26/2013	Long	1,197.36	1,000.00	197.36
346.080	Credit Suisse Commodity Return Strategy Fd 22544R305	03/26/2009	P	04/25/2013	Long	2,644.05	2,560.99	83.06
238.100	Credit Suisse Commodity Return Strategy Fd 22544R305	11/22/2011	P	04/25/2013	Long	1,819.05	2,000.00	-180.95
253.460	Fidelity Advisor New Insights Cl I 316071604	03/23/2012	P	11/15/2013	Long	7,500.00	5,753.63	1,746.37
563.910	Vanguard Short-Term Investment Grade Fund Adm 922031836	11/20/2009	P	07/26/2013	Long	6,028.20	6,000.00	28.20
341.000	Vanguard Short-Term Investment Grade Fund Adm 922031836	03/28/2011	P	07/26/2013	Long	3,645.30	3,658.94	-13.64
932.840	Vanguard Short-Term Investment Grade Fund Adm 922031836	01/30/2012	P	07/26/2013	Long	9,972.02	10,000.00	-27.98
2,795.900	Vanguard Short-Term Investment Grade Fund Adm 922031836	03/23/2012	P	07/26/2013	Long	29,888.16	30,000.00	-111.84
952.380	Vanguard Total Bond Market Index Fd Signal Sh 921937868	11/20/2009	P	07/26/2013	Long	10,171.42	10,000.00	171.42
191.570	Vanguard Total Bond Market Index Fd Signal Sh 921937868	12/16/2009	P	07/26/2013	Long	2,045.98	2,000.00	45.98
370.030	Vanguard Total Bond Market Index Fd Signal Sh 921937868	08/12/2010	P	07/26/2013	Long	3,951.90	4,000.00	-48.10
927.640	Vanguard Total Bond Market Index Fd Signal Sh 921937868	11/17/2010	P	07/26/2013	Long	9,907.24	10,000.00	-92.76

100,684.84 3,717.12

100,684.84
(7,572.27)

96,967.72
(6,500.00)

96,967.72

93,112.57 LT proceeds

90,467.72 LT Cost

How Acquired: F
L - Payment Mad

ory, C - Call, G - Gift,
vestment, S - Spinoff, U - Undetermined

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 16a - Legal Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INDIRECT LEGAL FEES	\$ 20	\$	\$	\$
TOTAL	20	0	0	0

Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
JVTR - TAX RETURN PREPARATION	\$	\$	\$	\$
TOTAL	0	0	0	0

Statement 2 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
GREENLEAF TRUST - ADVISORY FEES	\$ 3,099	\$ 3,099	\$	\$
TOTAL	3,099	3,099	0	0

Statement 3 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INDIRECT TAXES/LICENSES	\$ 400	\$	\$	\$
TOTAL	400	0	0	0

Federal Statements

5/9/2014 3:42 PM

Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES				
MEMORIAL PLAQUE	100			
FRAMING	142			
POSTAGE	30			
TOTAL	272	0	0	0

Statement 5 - Form 990-PF, Part II, Line 10a - US and State Government Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
FEDERAL HOME LOAN STEP GOVT BOND	\$ 29,985	\$ 29,985	COST	\$ 27,453
US TREASURY NOTE		15,290	COST	15,398
TOTAL	\$ 29,985	\$ 45,275		\$ 42,851

Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
ALPHASIMPLEX MANAGED FUTURES		\$ 7,500	COST	\$ 7,710
BUFFALO SMALL CAP FUND		12,000	COST	12,475
CALAMOS INTERNATIONAL GROWTH FUND	2,564	2,564	COST	2,952
COLUMBIA ACORN FUND CL Z	10,994		COST	
COLUMBIA DIVIDEND OPP.	40,667	40,667	COST	50,503
COLUMBIA SMALL CAP VALUE	10,522	10,522	COST	12,630
CREDIT SUISSE COMMODITY	4,561		COST	
DELAWARE EMERGING MARKET	3,853	3,854	COST	5,013
FIDELITY ADVISOR	38,053	32,299	COST	45,667
GOLDMAN SACHS MID CAP	19,298	19,298	COST	25,725
ING GLOBAL REAL ESTATE	6,812	6,812	COST	7,437
MATTHEWS PACIFIC TIGER	6,077	6,077	COST	7,171
STERLING CAPITAL EQUITY	7,698	7,699	COST	9,330

Federal Statements

5/9/2014 3:42 PM

Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments (continued)

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
T ROWE PRICE MID CAP	\$ 21,226	\$ 21,226	COST	\$ 28,367
TOUCHSTONE MERGER	5,100	7,350	COST	7,488
TOUCHSTONE SANDS CAP	8,463	8,463	COST	11,204
VANGUARD EMERGING MARKETS ETF	4,316	4,316	COST	4,402
WISDOMTREE EMERGING MARKET	4,082	4,082	COST	4,102
WISDOMTREE ETF EMERGING MKT	6,230	6,230	COST	6,022
TOTAL	\$ 200,516	\$ 200,959		\$ 248,198

Statement 7 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
TEMPLETON GLOBAL BOND FD	\$ 20,500	\$ 20,500	COST	\$ 20,660
VANGUARD ST CORPORATE	49,659		COST	
VANGUARD TOTAL BOND	26,000		COST	
CELGENE CORP	15,416	15,416	COST	15,409
OHIO POWER CO	17,509	17,509	COST	16,606
AMGEN	15,213	15,213	COST	15,466
BROADCOM CORP	15,427	15,427	COST	15,179
DISNEY WALT CO		17,387	COST	17,354
PIMCO TOTAL RETURN		5,000	COST	4,954
FIDELITY FLOATING RATE		30,000	COST	29,940
TOTAL	\$ 159,724	\$ 136,452		\$ 135,568

Federal Statements**Form 990-PF, Part XV, Line 1a - Managers Who Contributed Over 2% or \$5,000**

<u>Name of Manager</u>	<u>Amount</u>
JACOB STUCKI/ESTATE OF JACOB STUCKI	\$ <u> </u>
TOTAL	\$ <u> </u> 0

Form 990-PF, Part XV, Line 1b - Managers Who Own 10% or More Stock

<u>Name of Manager</u>	<u>Amount</u>
NONE	\$ <u> </u>
TOTAL	\$ <u> </u> 0

Federal Statements

5/9/2014 3:42 PM

Statement 8 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Name		Address		Relationship	Status	Purpose	Amount
BOYS & GIRLS CLUB KALAMAZOO MI 49001		915 LAKE STREET	PUBLIC			GENERAL	500
CHEFF THERAPEUTIC RIDING CENTER AUGUSTA MI 49012		8450 N. 43RD STREET	PUBLIC			PROGRAMS	2,000
CITY OF KALAMAZOO KALAMAZOO MI 49001		415 E STOCKBRIDGE AVE	GOVERNMENT			GENERAL	5,000
COMMUNITY HEALING CENTER KALAMAZOO MI 49009		2615 STADIUM DRIVE	PUBLIC			GENERAL	500
DRUG TREATMENT COURT FOUNDATION KALAMAZOO MI 49005		PO BOX 50587	GOVERNMENT			GENERAL	1,000
FAIR FOOD MATTERS KALAMAZOO MI 49007		323 N BURDICK ST	PUBLIC			GENERAL	750
FAMILY & CHILDREN SERVICES INC. KALAMAZOO MI 49001		1608 LAKE STREET	PUBLIC			GENERAL	500
FONTANA CHAMBER ARTS KALAMAZOO MI 49007		359 S KALAMAZOO MALL	PUBLIC			PROGRAMS	5,000
FOOD BANK OF SC MICHIGAN BATTLE CREEK MI 49037		5451 WAYNE ROAD	PUBLIC			GENERAL	1,000
GIRLS ON THE RUN KALAMAZOO MI 49007		157 S KALAMAZOO MALL,	PUBLIC			GENERAL	500
IRVING S GILMORE KEYBOARD FESTIVAL KALAMAZOO MI 49007		359 S KALAMAZOO MALL	PUBLIC			GENERAL	1,500
IRVING S GILMORE KEYBOARD FESTIVAL KALAMAZOO MI 49007		359 S KALAMAZOO MALL	PUBLIC			GENERAL	500
KALAMAZOO NATURE CENTER KALAMAZOO MI 49009		7000 N WESTNEDGE	PUBLIC			GENERAL	500
KALAMAZOO SYMPHONY ORCHESTRA KALAMAZOO MI 49007		359 S KALAMAZOO MALL	PUBLIC			PROGRAMS	15,000
KVCC FOUNDATION KALAMAZOO MI 49009		6767 WEST O AVENUE	PUBLIC			GENERAL	1,000
MINISTRY WITH COMMUNITY INC. KALAMAZOO MI 49007		440 N CHURCH	PUBLIC			PROGRAMS	1,500
MINISTRY WITH COMMUNITY INC. KALAMAZOO MI 49007		440 N CHURCH	PUBLIC			GENERAL	100

STU5281C001 Stucki Family Foundation
38-3385788
FYE: 12/31/2013

Federal Statements

5/9/2014 3:42 PM

Statement 8 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name		Address		Relationship	Status	Purpose	Amount
NATURE CONSERVANCY - MICHIGAN	COMSTOCK PARK MI 49321	3728 WEST RIVER DR, NE	PUBLIC			GENERAL	1,000
THE LIVESTOCK CONSERVANCY	PITTSBORO NC 27312	PO BOX 477	PUBLIC			GENERAL	500
TILLER'S INTERNATIONAL	SCOTTS MI 49088	10515 EAST OP AVENUE	PUBLIC			GENERAL	550
YOUTHFUL OFFENDER TRANSITIONS	KALAMAZOO MI 49007	326 W. KALAMAZOO AVE	GOVERNMENT			PROGRAMS	2,000
TOTAL							40,900