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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ **Do not enter Social Security numbers on this form as it may be made public. By law, the IRS cannot redact the information on the form.**

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

OMB No 1545-0052

2013

Open to Public Inspection

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

Name of foundation
THE JOHN E KUENZL FOUNDATION INC

A Employer identification number
39-1998578

Number and street (or P O box number if mail is not delivered to street address) Room/suite
PO BOX 2886

B Telephone number (see instructions)
(920) 231-5890

City or town, state or province, country, and ZIP or foreign postal code
OSHKOSH, WI 549032886

C If exemption application is pending, check here ▶ ☐

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

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

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)*▶$ 40,289,982

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

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

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))*

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	16,238,367			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	24,346	24,346		
	4	Dividends and interest from securities	887,084	887,084		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	430,071			
	b	Gross sales price for all assets on line 6a 5,542,771				
	7	Capital gain net income (from Part IV, line 2)		430,071		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	259,716	0		
	12	**Total.** Add lines 1 through 11	17,839,584	1,341,501		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0	0		0
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	40,085	20,042		20,043
	c	Other professional fees (attach schedule)	45,763	45,763		0
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	342,885	275,242		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	25,173	0		0
	24	**Total operating and administrative expenses.** Add lines 13 through 23	453,906	341,047		20,043
	25	Contributions, gifts, grants paid	1,007,800			1,007,800
	26	**Total expenses and disbursements.** Add lines 24 and 25	1,461,706	341,047		1,027,843
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	16,377,878			
	b	**Net investment income** (if negative, enter -0-)		1,000,454		
	c	**Adjusted net income** (if negative, enter -0-)				

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	51,720	34,157	34,157
2	Savings and temporary cash investments	538,926	619,132	619,132
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) ▶ 547,058			
	Less allowance for doubtful accounts ▶ 0	655,428	547,058	547,058
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10a	Investments—U S and state government obligations (attach schedule)			
b	Investments—corporate stock (attach schedule)	7,337,542	24,589,014	28,127,966
c	Investments—corporate bonds (attach schedule)	5,231,035	4,101,708	4,225,454
11	Investments—land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
12	Investments—mortgage loans			
13	Investments—other (attach schedule)	12,184,907	12,493,644	6,736,215
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)	25,999,558	42,384,713	40,289,982
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	0	0	
28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
29	Retained earnings, accumulated income, endowment, or other funds	25,999,558	42,384,713	
30	**Total net assets or fund balances** (see page 17 of the instructions)	25,999,558	42,384,713	
31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	25,999,558	42,384,713	

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	25,999,558
2	Enter amount from Part I, line 27a	2	16,377,878
3	Other increases not included in line 2 (itemize) ▶	3	7,277
4	Add lines 1, 2, and 3	4	42,384,713
5	Decreases not included in line 2 (itemize) ▶	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	42,384,713

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)
1 a	PUBLICLY TRADED SECURITIES	P		
b	CAPITAL GAINS DIVIDENDS	P		
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	5,410,688		5,112,700	297,988
b	132,083			132,083
c				
d				
e				

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
a				297,988
b				132,083
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	430,071
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 . . .	3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	1,065,070	21,274,833	0 050062
2011	1,116,508	21,786,286	0 051248
2010	1,151,525	23,211,313	0 049611
2009	1,114,205	23,132,280	0 048167
2008	801,930	24,463,682	0 032780

2	**Total** of line 1, column (d). . . .	2	0 231868
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 046374
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5. . . .	4	22,390,433
5	Multiply line 4 by line 3. . . .	5	1,038,334
6	Enter 1% of net investment income (1% of Part I, line 27b). . . .	6	10,005
7	Add lines 5 and 6. . . .	7	1,048,339
8	Enter qualifying distributions from Part XII, line 4. . . .	8	1,027,843

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 page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter ______ (attach copy of letter if necessary–see instructions)				
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b			1	20,009
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	20,009
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	20,009
6	Credits/Payments				
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	14,120		
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	14,120
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached			8	62
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	5,951
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** ▶ **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		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ 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		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
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	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶WI			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶GERALD STADTMUELLER Telephone no ▶(920) 231-5890

Located at ▶100 CITY CENTER OSHKOSH WI ZIP+4 ▶54903

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 |

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

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

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

		Line	Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☑ No			
	If "Yes," list the years ▶ 20____ , 20____ , 20____ , 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____ , 20____ , 20____ , 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☑ Yes ☐ No			
b	If "Yes," did it have excess business holdings in 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		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?	**5b**		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**		

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
JAMES J WILLIAMSON PO BOX 2886 OSHKOSH, WI 54903	VICE PRESIDENT/SECRETARY 0 50	0	0	0
GERALD STADTMUELLER PO BOX 2886 OSHKOSH, WI 54903	PRESIDENT/TREASURER 0 50	0	0	0
NORMA KUENZL PO BOX 2886 OSHKOSH, WI 54903	DIRECTOR 0 50	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 ▶ 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. . . . . ▶		0

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
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	
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3 . . . . ▶	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	21,874,489
b	Average of monthly cash balances	1b	856,915
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	22,731,404
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	22,731,404
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	340,971
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	22,390,433
6	**Minimum investment return.** Enter 5% of line 5	6	1,119,522

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	1,119,522
2a	Tax on investment income for 2013 from Part VI, line 5 — 2a: 20,009		
b	Income tax for 2013 (This does not include the tax from Part VI) — 2b: 43,363		
c	Add lines 2a and 2b	2c	63,372
3	Distributable amount before adjustments Subtract line 2c from line 1	3	1,056,150
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	1,056,150
6	Deduction from distributable amount (see instructions)	6	0
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	1,056,150

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	1,027,843
b	Program-related investments—total from Part IX-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,027,843
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	1,027,843

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				1,056,150
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			1,007,557	
b Total for prior years 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.				
b From 2009.				
c From 2010.				
d From 2011.				
e From 2012.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2013 from Part XII, line 4 ► $ 1,027,843				
a Applied to 2012, but not more than line 2a			1,007,557	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				20,286
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2013 *(If an amount appears in column (d), the same amount must be shown in column (a).)*	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount —see instructions		0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				1,035,864
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)	0			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2009.				
b Excess from 2010.				
c Excess from 2011.				
d Excess from 2012.				
e Excess from 2013.				

Part XIV 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 organization 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 organization 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))

NORMA KUENZL

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

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

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

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

GERALD J STADTMUELLER
P O BOX 2886
OSHKOSH, WI 54903
(920) 231-5890

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

APPLICATIONS SHOULD BE SUBMITTED IN WRITING ALONG WITH THE NAME AND ADDRESS OF THE APPLICANT AND A DESCRIPTION OF HOW THE FUNDS WILL BE USED

c Any submission deadlines

DECEMBER 1

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

NONE

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 Additional Data Table				
Total . . . . ▶ **3a**				1,007,800
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions)
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	24,346	
4 Dividends and interest from securities			14	887,084	
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	430,071	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a INCOME PER GAMBRINUS ENTERPRISES, INC K-1					260,579
b INCOME PER CENTURY INVESTMENT FUND V K-1					-863
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0		1,341,501	259,716

13 **Total.** Add line 12, columns (b), (d), and (e) 13 1,601,217

(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)
11A	ORDINARY BUSINESS INCOME(LOSS) RECEIVED FROM GAMBRINUS ENTERPRISES K-1
11B	ORDINARY BUSINESS INCOME(LOSS) RECEIVED FROM CENTURY INVESTMENT FUND V

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)**		No
(2) Other assets.	**1a(2)**		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	**1b(1)**		No
(2) Purchases of assets from a noncharitable exempt organization.	**1b(2)**		No
(3) Rental of facilities, equipment, or other assets.	**1b(3)**		No
(4) Reimbursement arrangements.	**1b(4)**		No
(5) Loans or loan guarantees.	**1b(5)**		No
(6) Performance of services or membership or fundraising solicitations.	**1b(6)**		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	**1c**		No

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

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 or fiduciary) is based on all information of which preparer has any knowledge

****** | 2014-11-17 | ******

Signature of officer or trustee | Date | Title

May the IRS discuss this return with the preparer shown below (see instr)? ☑ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
GERALD J STADTMUELLER CPA				P00611466

Firm's name ▶ CLIFTONLARSONALLEN LLP | Firm's EIN ▶ 41-0746749

Firm's address ▶ PO BOX 2886 OSHKOSH, WI 549032886 | Phone no (920) 231-5890

Form 990PF Part XV Line 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*				
AMERICAN DIABETES FOUNDATION 1701 NORTH BEAUREGARD STREET ALEXANDRIA, VA 22311	NONE	PC	GENERAL PURPOSE	5,000
AMERICAN HEART ASSOCIATION 7272 GREENVILLE AVENUE DALLAS, TX 75231	NONE	PC	GENERAL PURPOSE	5,000
AMERICAN LEGION TIER-PUDDY POST 75 PO BOX 424 FOND DU LAC, WI 54936	NONE	NC	GENERAL PURPOSE	1,000
AMERICAN NATIONAL RED CROSS 2025 E STR NW WASHINGTON, DC 20006	NONE	PC	OKLAHOMA TORNADO FUND	10,000
AMERICAN RED CROSS OF EASTERN WI 515 S WASHBURN ST 206 OSHKOSH, WI 54904	NONE	PC	GENERAL PURPOSE	5,000
AMERICAN RED CROSS OF FOND DU LAC 272 N MAIN ST FOND DU LAC, WI 54935	NONE	PC	GENERAL PURPOSE	5,000
ARC-WINNEBAGO COUNTY DISABILITY ASSOCIATION INC 115 WASHINGTON AVE STE A OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	5,000
BLOOMER FIRE DEPARTMENT 1503 MAIN STREET BLOOMER, WI 54724	NONE	PC	GENERAL PURPOSE	2,500
BOYS AND GIRLS CLUB OF OSHKOSH 501 EAST PARKWAY AVENUE OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	80,000
CHRISTINE ANN DOMESTIC ABUSE SERVICES 1416 SOUTH COMMERCIAL NEENAH, WI 54956	NONE	PC	GENERAL PURPOSE	5,000
CLARITY CARE 424 WASHINGTON AVE OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	15,000
COMMUNITY CLOTHES CLOSET 1465B OPPORTUNITY WAY MENASHA, WI 54952	NONE	PC	GENERAL PURPOSE	1,000
DAY BY DAY WARMING SHELTER 449 HIGH AVE OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	20,000
ELDORADO VOLUNTEER FIRE DEPARTMENT W9218 COUNTY RD N ELDORADO, WI 54932	NONE	PC	GENERAL PURPOSE	2,500
EXPERIMENTAL AIRCRAFT ASSOCIATION 3000 POBEREZNY RD OSHKOSH, WI 54902	NONE	PC	GENERAL PURPOSE	5,000
Total . . . . ▶ **3a**				1,007,800

Form 990PF Part XV Line 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*				
FRIENDS OF WISCONSIN PUBLIC TELEVISION 821 UNIVERSITY AVE NO 1076 MADISON, WI 53706	NONE	PC	GENERAL PURPOSE	50,000
GREENVILLE FIRE RESCUE W6860 PARKVIEW DR GREENVILLE, WI 54942	NONE	PC	GENERAL PURPOSE	500
GROWING OSHKOSH 36 BROAD STR OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	15,000
HOOPER COMMUNITY CENTER 36 BROAD STREET 100 OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	15,000
JASPER PICKETT FOUNDATION PO BOX 336 PICKETT, WI 54964	NONE	PC	GENERAL PURPOSE	1,000
LIVING HEALTHY COMMUNITY CLINIC 510 DOCTORS COURT OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	11,000
MERCY MEDICAL CENTER FOUNDATION OF OSHKOSH PO BOX 3370 OSHKOSH, WI 54903	NONE	PC	GENERAL PURPOSE	10,000
NEENAH HIGH SCHOOL BOOSTER CLUB 1375 MARTINGALE LANE NEENAH, WI 54956	NONE	PC	GENERAL PURPOSE	5,000
NEIGHBORHOOD HOUSING SERVICES OF KENOSHA 6524 14TH AVE KENOSHA, WI 53140	NONE	PC	GENERAL PURPOSE	25,000
NOVA COUNSELING SERVICES 3240 JACKSON ST OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	10,000
OCCUPAWS GUIDE DOG ASSOCIATION 5659 ENCHANTED VALLEY RD CROSS PLAINS, WI 53528	NONE	PC	GENERAL PURPOSE	1,000
ONE FUND BOSTON PO BOX 990009 BOSTON, MA 02199	NONE	PC	GENERAL PURPOSE	10,000
OSHKOSH AREA COMMUNITY FOUNDATION 230 OHIO ST 100 OSHKOSH, WI 54902	NONE	PC	GENERAL PURPOSE	15,000
OSHKOSH AREA COMMUNITY FOUNDATION 230 OHIO ST 100 OSHKOSH, WI 54902	NONE	PC	US VENTURE	145,000
OSHKOSH AREA COMMUNITY FOUNDATION 230 OHIO ST 100 OSHKOSH, WI 54902	NONE	PC	OSHKOSH INCLUSION PARK PROJECT	25,000
Total . . . . ▶ **3a**				1,007,800

Form 990PF Part XV Line 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*				
OSHKOSH AREA HUMANE SOCIETY 1925 SHELTER CT OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	15,000
OSHKOSH AREA UNITED WAY 36 BROAD STREET 100 OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	150,000
OSHKOSH COMMUNITY FOOD PANTRY 2551 JACKSON ST OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	150,000
OSHKOSH COMMUNITY YMCA 324 WASHINGTON AVE OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	55,000
OSHKOSH COMMUNITY YMCA 324 WASHINGTON AVE OSHKOSH, WI 54901	NONE	PC	TECH VENTURE KIDS CAMP	5,000
OSHKOSH OPERA HOUSE FOUNDATION 222 PEARL AVENUE OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	25,000
OSHKOSH PUBLIC MUSEUM 1331 ALGOMA BLVD OSHKOSH, WI 54901	NONE	EOF	GENERAL PURPOSE	5,000
OSHKOSH SYMPHONY ORCHESTRA 36 BROAD STR STE LL20 OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	15,000
OXFORD FIRE DEPARTMENT W8593 STATE ROAD 82 OXFORD, WI 53952	NONE	PC	GENERAL PURPOSE	2,500
PAINE ART CENTER AND GARDENS 1410 ALGOMA BLVD OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	25,000
PAINE ART CENTER AND GARDENS 1410 ALGOMA BLVD OSHKOSH, WI 54901	NONE	PC	WOUNDED WARRIOR	1,800
REACH COUNSELING SERVICES 1370 S COMMERCIAL ST NEENAH, WI 54956	NONE	PC	GENERAL PURPOSE	2,500
ROSHOLT FIRE DEPARTMENT 101 S MAIN ST ROSHOLT, WI 54473	NONE	PC	GENERAL PURPOSE	2,500
SALVATION ARMY 417 ALGOMA BLVD OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	6,000
STOCKBRIDGE FIRE DEPARTMENT 116 SOUTH MILITARY ST STOCKBRIDGE, WI 53088	NONE	PC	GENERAL PURPOSE	2,000
Total . . . . ▶ **3a**				1,007,800

Form 990PF Part XV Line 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*				
TOWN OF NEENAH FIRE DEPARTMENT 1600 BREEZEWOOD LN NEENAH, WI 54956	NONE	PC	GENERAL PURPOSE	2,500
TRI-COUNTY COMMUNITY DENTAL CLINIC 9 TRI-PARK WAY APPLETON, WI 54914	NONE	PC	GENERAL PURPOSE	6,500
VAN DYNE FIRE DEPARTMENT N9515 VAN DYNE RD VAN DYNE, WI 54979	NONE	PC	GENERAL PURPOSE	2,500
WACO FOUNDATION 1105 WOODED ACRES STE 701 WACO, TX 76710	NONE	PC	WEST TEXAS DISASTER RELIEF	10,000
WINNEBAGO COUNTY FAIR ASSOCIATION 3017 STATE ROAD 116 OMRO, WI 54963	NONE	PC	GENERAL PURPOSE	1,000
WINNEBAGO COUNTY HISTORICAL AND ARCHEOLOGICAL SOCIETY 234 CHURCH AVENUE OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	5,000
WINNEBAGO COUNTY LITERACY COUNCIL 106 WASHINGTON AVE OSHKOSH, WI 54901	NONE	PC	GENERAL PURPOSE	2,500
WINNECONNE AREA ASSISTANCE CENTER INC 102 S 3RD STR WINNECONNE, WI 54986	NONE	PC	GENERAL PURPOSE	10,000
Total . . . . ▶ **3a**				1,007,800

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

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 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
THE JOHN E KUENZL FOUNDATION INC

Employer identification number
39-1998578

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 for 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 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 990PF, 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
THE JOHN E KUENZL FOUNDATION INC

Employer identification number
39-1998578

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	ESTATE OF NORMA KUENZL 2850 S OAKWOOD RD OSHKOSH, WI 54904	$ 15,728,563	Person ☐ Payroll ☐ Noncash ☑ (Complete Part II for noncash contributions)
2	ESTATE OF NORMA KUENZL 2850 S OAKWOOD RD OSHKOSH, WI 54904	$ 509,804	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
THE JOHN E KUENZL FOUNDATION INC

Employer identification number
39-1998578

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	100% EQUITY IN LEE BEVERAGE CO	$ 15,728,563	2013-11-01
2	LANDHOLDT SECURITY INVESTMENTS	$ 509,804	2013-10-18
		$	
		$	
		$	
		$	

Name of organization
THE JOHN E KUENZL FOUNDATION INC

Employer identification number
39-1998578

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

TY 2013 Accounting Fees Schedule

Name: THE JOHN E KUENZL FOUNDATION INC

EIN: 39-1998578

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	40,085	20,042		20,043

TY 2013 Applied to Prior Year Election

Name: THE JOHN E KUENZL FOUNDATION INC

EIN: 39-1998578

Election: PURSUANT TO IRC SEC. 4942(H)(2) AND REG. 53.4942(A)3(D)(2), THE ABOVE REFERENCED FOUNDATION HEREBY ELECTS TO TREAT CURRENT YEAR QUALIFYING DISTRIBUTIONS IN EXCESS OF THE IMMEDIATELY PRECEDING TAX YEAR'S UNDISTRIBUTED INCOME AS BEING MADE OUT OF UNDISTRIBUTED INCOME FOR THE TAX YEAR ENDING 12/31/08.

TY 2013 Investments Corporate Bonds Schedule

Name: THE JOHN E KUENZL FOUNDATION INC

EIN: 39-1998578

Name of Bond	End of Year Book Value	End of Year Fair Market Value
DODGE & COX INCOME FUND	453,816	489,539
EATON VANC FLOATING RATE 1	609,903	673,721
EATON VANCE MUT FDS TR	241,843	262,875
JP MORGAN HIGH YIELD BOND FUND	257,636	259,070
JP MORGAN SHORT DURATION BOND	736,312	741,411
JP MORGAN STRATEGIC INCOME	226,876	262,907
JP MORGAN TR I INFL MANAGED BD SEL	270,708	262,737
DOUBLELINE FDS TR	481,726	456,147
GS MARKET PLUS ASIS FX NT 5-16-14	90,000	82,148
JPM CORE BOND FUND - SEL	472,198	466,906
JPM MULTI SECTOR INCOME FD - SEL	260,690	267,993

TY 2013 Investments Corporate Stock Schedule

Name: THE JOHN E KUENZL FOUNDATION INC

EIN: 39-1998578

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CMS ENERGY	85,000	267,700
CVS CORP	49,902	85,884
FIDELITY NATIONAL INFO	25,503	73,434
FIRST ENERGY	156,480	131,920
XSTELOS HOLDINGS	1,647	459
FOSTER WHEELER	11,100	33,000
INTL RECTIFIER	881,200	521,400
ISHARES TR RUSSELL MIDCAP INDEX	294,399	387,848
BANK OF MONTREAL (M&I MERGER)	98,868	25,464
NEWPARK RESOURCES	4,767	10,324
THE TIMKEN COMPANY	94,760	220,280
UNISYS CORP	137,950	33,570
JP MORGAN US LARGE CAP CORE PLUS	584,014	658,624
XCEL ENERGY	50,445	83,820
GATEWAY FUND - Y	368,044	401,777
ARTISIAN INTL VALUE FUND	307,331	458,564
JP MORGAN INTREPID AMERICAN	230,872	326,950
JP MORGAN LARGE CAP GROWTH FUND	225,131	324,562
JP MORGAN STR INC. OPP FD	770,490	766,577
NEUBERGER BERMAN MULTI CAP	473,202	683,736
SPDR S&P 500 EFT TRUST	960,248	1,135,474
PRUDENTIAL JENNISON MID-CAP	368,989	451,609
CAPITAL PRIVATE CLIENT SVCS	361,817	417,278
MATTHEWS PACIFIC TIGER INSTL FUND	264,642	298,521
HSBC FDS	361,969	344,482
JPM REN SPX 9/4/14	130,000	141,336
OAKMARK INTERNATIONAL FUND	323,403	336,657
VANGUARD FTSE EURPORT ETF	139,078	144,236
T ROWE PRICE NEW ASIA	118,071	119,716
DELAWARE EMERGING MARKETS FUND	124,474	136,837

Name of Stock	End of Year Book Value	End of Year Fair Market Value
JPM CHINA REGION FD	118,934	128,101
JPM TR I GL RES ENH IDX FD	251,900	281,531
NUVEEN MUN HIGH INCOME OPPORTUNITY FUND	244,329	247,968
PIONEER MUN HIGH INCOME ADVANTAGE TR	241,492	239,274
LEE BEVERAGE CO., INC.	15,728,563	18,209,053

TY 2013 Investments - Other Schedule

Name: THE JOHN E KUENZL FOUNDATION INC

EIN: 39-1998578

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
GAMBRINUS	AT COST	10,483,947	4,788,589
ARBRITRAGE FUNDS I	AT COST	370,467	365,551
CENTURY INVESTMENT FUND V	AT COST	109,318	0
JPM BREN MXEA 6/25/13	AT COST	130,000	148,603
DB MARKET PLUS SX5E 3/19/14	AT COST	110,000	132,095
EQUINOX FDS TR	AT COST	631,723	640,143
GOLDMAN SACHS TR	AT COST	178,186	181,247
BARC BEN BRENT 9/29/14	AT COST	65,000	66,073
JPM ENHANCED BETA	AT COST	145,000	147,741
PIMCO COMMODITIES PLUS STRATEGY	AT COST	145,003	145,823
SG LEV COMMODITY CBEN 4/2/14	AT COST	125,000	120,350

TY 2013 Other Expenses Schedule

Name: THE JOHN E KUENZL FOUNDATION INC

EIN: 39-1998578

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
GAMBRINUS ENTERPRISES, INC K-1	709	0		0
PENALTIES & INTEREST	24,452	0		0
OTHER EXPENSES	12	0		0

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TY 2013 Other Income Schedule

Name: THE JOHN E KUENZL FOUNDATION INC

EIN: 39-1998578

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
INCOME PER GAMBRINUS ENTERPRISES, INC K-1	260,579		260,579
INCOME PER CENTURY INVESTMENT FUND V K-1	-863		-863

TY 2013 Other Increases Schedule

Name: THE JOHN E KUENZL FOUNDATION INC

EIN: 39-1998578

Description	Amount
ADJUSTMENTS TO VARIOUS INVESTMENTS' COST BASIS	7,277

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TY 2013 Other Professional Fees Schedule

Name: THE JOHN E KUENZL FOUNDATION INC

EIN: 39-1998578

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
VALUATION FEES	45,763	45,763		0

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TY 2013 Taxes Schedule

Name: THE JOHN E KUENZL FOUNDATION INC

EIN: 39-1998578

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INCOME TAXES	341,247	273,604		0
FOREIGN TAX PAID	1,638	1,638		0