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990-PF

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

OMB No 1545-0052

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.

Open to Public Inspection

		dar year 2013 or tax year beginning		, 2013	, and e	ending		, 20
Na	me of for	undation				A Employe	r identification numbe	
Do	rothy Ir	busch Foundation, Inc					39-6084238	
Νι	mber and	d street (or P O box number if mail is not delivered to street address)		Room/s	suite	B Telephon	e number (see instruction	ons)
		Kilbourn Avenue		414-225-1404				
Cit	y or town	n, state or province, country, and ZIP or foreign postal code				C If exempt	ion application is pendi	ng, check here ▶ 📋
Μι	waukee	e, WI 53202-6677						
G	Check	all that apply. 🔲 Initial return 🔲 Initial return		public (charity	D 1. Foreigi	n organizations, check l	nere ▶ 🗍
		☐ Final return ☐ Amended r				2. Foreig	n organizations meeting	the 85% test.
		Address change Name char				check	here and attach compu	tation ▶ 🗌
Н		type of organization. Section 501(c)(3) exempt pr					foundation status was t 07(b)(1)(A), check here	terminated under
브		n 4947(a)(1) nonexempt charitable trust						
ı		parket value of all assets at J Accounting method:	: ☑ Cash	⊔ Ac	crual		ndation is in a 60-month	
	line 16	year (from Part II, col (c), Other (specify)				under sec	ction 507(b)(1)(B), check	chere ▶ 🗌
		91-24/2-21 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	on cash basis	5) — T				(0.0.)
Ц	art l	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal	(a) Revenue expenses p			investment	(c) Adjusted net	(d) Disbursements for charitable
		the amounts in column (a) (see instructions))	books)ei	ın	icome	ıncome	purposes (cash basis only)
_	1 4							
	1 2	Contributions, gifts, grants, etc., received (attach schedule) Check ► ☐ if the foundation is not required to attach Sch. B					ļ	
	3	Interest on savings and temporary cash investments						
	4	Dividends and interest from securities		6,896		E6 006		
	5a	Gross rents		0,090		56,896		
۵J	b	Net rental income or (loss)						
	6a	Net gain or (loss) from sale of assets not on line 10		0,373				
Revenue	b	Gross sales price for all assets on line 6a 324,375	· — - '	0,373				
Š	7	Capital gain net income (from Part IV, line 2)		-		10,373		 ,
Re	8	Net short-term capital gain	******			10,010	0	
	9	Income modifications						
	10a	Gross sales less returns and allowances						
	b	Less: Cost of goods sold						1
	С	Gross profit or (loss) (attach schedule)						
	11	Other income (attach schedule)						
_	12	Total. Add lines 1 through 11	6	57,269		67,269	0	
S	13	Compensation of officers, directors, trustees, etc.		50,000		12,500		37,500
Se	14	Other employee salaries and wages	1	14,400		3,600		10,800
ē	15	Pension plans, employee benefits						
ive Expenses	16a	Legal fees (attach schedule)		630		158		472
ē	Ь	Accounting fees (attach schedule)						1
		Other professional fees (attach schedule)		8,091		_6,068		2,023
itra	17	Interest					CENTED	18/
ī.	18	Taxes (attach schedule) (see instructions)		273		R		15/
Ē	19 20	Depreciation (attach schedule) and depletion Occupancy					19 8014	18/
A	21	Travel, conferences, and meetings		2,708		15	1 . KY (5)	2,708
Operating and Administrat	22	Printing and publications		2,700		10/	Mrs.	2,700
<u>a</u>	23	Other expenses (attach schedule)		411		1597	12/19/2 14th	385
ij	24	Total operating and administrative expenses.		- ''' 		1000	DE	- 333
ā		Add lines 13 through 23	7	76,513		22,852	200	53,888
ğ	25	Contributions, gifts, grants paid		90,800				190,800
O	26	Total expenses and disbursements. Add lines 24 and 25		57,313		22,352		244,688
_	27	Subtract line 26 from line 12:						
	а	Excess of revenue over expenses and disbursements	(20	0,044)				
	b	Net investment income (if negative, enter -0-)				44,917		
	С	Adjusted net income (if negative, enter -0-)					0	

For Paperwork Reduction Act Notice, see instructions.

SCANNED MAY 2 2 2014

Cat No 11289X

Form 990-PF (2013)

Part II		Raiance Shoots Attached schedules and amounts in the description column	Beginning of year	End o	of year	
Γē	шш	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value	
	1	Cash—non-interest-bearing			_	
	2	Savings and temporary cash investments	90,824	99,895	99,895	
	3	Accounts receivable ▶			E E	
		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) .		į		
	7	Other notes and loans receivable (attach schedule) ► 15,000				
		Less: allowance for doubtful accounts ▶ 0		15,000	15,000	
ţ	8	Inventories for sale or use	1:	-	· · ·	
Assets	9	Prepaid expenses and deferred charges	·			
As	10a	Investments – U.S. and state government obligations (attach schedule)				
-	ь	Investments—corporate stock (attach schedule)	2,125,782	1,886,146	2,985,024	
	С	Investments – corporate bonds (attach schedule)	77,787	108,684		
	11	Investments—land, buildings, and equipment, basis ▶				
		Less. accumulated depreciation (attach schedule) ▶				
	12	Investments—mortgage loans				
	13	Investments other (attach schodule)				
	14	Land, buildings, and equipment. basis ▶				
		Less. accumulated depreciation (attach schedule) ▶				
	15	Other assets (describe ▶				
	16	Other assets (describe Total assets (to be completed by all filers—see the			• ***	
		instructions Also, see page 1, item l)	2,309,393	2,109,725	3,206,928	
_	17	Accounts payable and accrued expenses				
	18	Grants payable				
<u>ë</u>	19	Deferred revenue				
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons				
ap	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ►)			1	
	23	Total liabilities (add lines 17 through 22)				
		Foundations that follow SFAS 117, check here ▶ □	i			
es		and complete lines 24 through 26 and lines 30 and 31.			ì	
Ē	24	Unrestricted	2,309,393	2,109,725	:	
aja	25	Temporarily restricted				
8	26	Permanently restricted				
and Balances		Foundations that do not follow SFAS 117, check here ▶ □				
屲		and complete lines 27 through 31.			!	
Net Assets or	27	Capital stock, trust principal, or current funds				
ţ	28	Paid-in or capital surplus, or land, bldg., and equipment fund				
SSe	29	Retained earnings, accumulated income, endowment, or other funds			<u>'</u>	
Ä	30	Total net assets or fund balances (see instructions)	2,309,393	2,109,725	<u> </u>	
let	31	Total liabilities and net assets/fund balances (see				
~		instructions)	2,309,393	2,109,725		
Pa	rt III	Analysis of Changes in Net Assets or Fund Balances				
_1		al net assets or fund balances at beginning of year-Part II, colu				
		-of-year figure reported on prior year's return)			2,309,393	
2	2 Ente	er amount from Part I, line 27a		2	(200,044)	
_					977	
4		I lines 1, 2, and 3		4	2,110,326	
_					601	
6	5 Tota	reases not included in line 2 (Itemize) ► al net assets or fund balances at end of year (line 4 minus line 5)—	Part II, column (b), lin	e 30 6	2,109,725	
_					50 000-PE (2012)	

_		und(s) of property sold (e g , real estate, , or common stock, 200 shs MLC Co)		(b) How acquired P-Purchase D-Donation		e acquired , day, yr)	(d) Date sold (mo , day, yr)
1 <u>a</u>	See attached schedule.						
b							
c							
<u>d</u>				 			
<u>e</u>	(a) Crass soles area	(f) Depreciation allowed	(g) Cost or	other basis		(h) Gai	n or (loss)
	(e) Gross sales price	(or allowable)	plus expe	ense of sale		(e) plus (f) minus (g)
a b							10,37
C						· -	,.
d					-		
e							
	Complete only for assets show	ing gain in column (h) and owned b	y the foundation	on 12/31/69		(I) Gains (Col	(h) gain minus
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69		ss of col (i)	C	ol (k), but no	t less than -0-) or rom col (h))
а							
b							
С			 				
<u>d</u>				··			
<u>e</u>		() () () ()	la a antan ia Da		ļ		
2	Capital gain net income or		ilso enter in Pa enter -0- in Pa		2		_10,37
3		or (loss) as defined in sections					
		line 8, column (c) (see instruc-	tions). If (loss)), enter -0- ın }			
	Part I, line 8	<u> </u>			3		(1,90
art	V Qualification Unde	r Section 4940(e) for Redu	rad Tay An i				
r o	otional use by domestic privation 4940(d)(2) applies, leave	ate foundations subject to the s					
or o sect as t	ion 4940(d)(2) applies, leave ne foundation liable for the s s," the foundation does not o Enter the appropriate amou	ate foundations subject to the s	ection 4940(a) able amount o o not complete	tax on net invest f any year in the this part. uctions before m	tment in	rod?	
ect as t Ye:	ion 4940(d)(2) applies, leave ne foundation liable for the s ," the foundation does not c	ate foundations subject to the s this part blank. ection 4942 tax on the distribut ualify under section 4940(e). Do	able amount oo not completer; see the instr	tax on net invest f any year in the this part.	tment in base pe aking a	eriod? ny entries.	☐ Yes ☑ No
ect st Ye:	tion 4940(d)(2) applies, leave the foundation liable for the so s," the foundation does not do Enter the appropriate amou	this part blank. ection 4942 tax on the distribut ualify under section 4940(e). Do nt in each column for each yea Adjusted qualifying distributions	able amount oo not completer; see the instr	f any year in the this part. uctions before m (c) f noncharitable-use a	tment in base pe aking a	riod? ny entries. (col (b)	(d) tribution ratio
ect s t Ye:	tion 4940(d)(2) applies, leave the foundation liable for the so s," the foundation does not on Enter the appropriate amountained (a) Base period years indar year (or tax year beginning in)	this part blank. ection 4942 tax on the distribut ualify under section 4940(e). Do not in each column for each year (b) Adjusted qualifying distributions	able amount on not complete r; see the instr	f any year in the this part. uctions before m (c) of noncharitable-use a	base pe	eriod? ny entries. (col (b)	tribution ratio divided by col (c))
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or o sect as t Yes	ion 4940(d)(2) applies, leave the foundation liable for the so," the foundation does not of Enter the appropriate amount (a) Base period years indar year (or tax year beginning in) 2012 2011 2010 2009 2008 Total of line 1, column (d) Average distribution ratio for number of years the foundation for the net value of nonces. Multiply line 4 by line 3. Enter 1% of net investment	ate foundations subject to the state foundations subject to the state this part blank. ection 4942 tax on the distribut ualify under section 4940(e). Do not in each column for each year (b) Adjusted qualifying distributions 217 239 254 260 242 or the 5-year base period — divication has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence if lest than the distribution has been in existence in the distribution has been in the distribut	able amount of onot complete r; see the instruction with the complete r; see the instruction of the complete r; see the complete r; see the instruction of the complete r; see the complete r; se	f any year in the this part. uctions before more from the this part. uctions before more from the from the this part. uctions before more from the from the this part. uctions before more from the from the this part. 2,64 3,06 3,52 3,16 3,87	base per aking a sissets 14,302 15,789 177,145 177,145	eriod? ny entries. (col (b)	(d) tribution ratio divided by col. (c)) 0 082336 0 078280 0 072184 0.082394
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Part	Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see in	<u>ns</u> tru	<u>ictio</u> i	ns)
1a	Exempt operating foundations described in section 4940(d)(2), check here \(\bigcup \) and enter "N/A" on line 1. Date of ruling or determination letter. (attach copy of letter if necessary—see instructions)	-		
b	Date of ruling or determination letter. (attach copy of letter if necessary—see instructions) Domestic foundations that meet the section 4940(e) requirements in Part V, check		449	
	here ► ☑ and enter 1% of Part I, line 27b		113	
С	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-)		0	
3	Add lines 1 and 2		449	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		0	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0		449	ļ
6	Credits/Payments:			·
a	2013 estimated tax payments and 2012 overpayment credited to 2013 6a 602 Exempt foreign organizations—tax withheld at source 6b			,
b	Exempt foreign organizations—tax withheld at source 6b Tax paid with application for extension of time to file (Form 8868) . 6c			
ď	Backup withholding erroneously withheld 6d			i
7	Total credits and payments. Add lines 6a through 6d		602	
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached		UUL	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶ 9			
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid > 10		153	
_11	Enter the amount of line 10 to be. Credited to 2014 estimated tax ▶ 153 Refunded ▶ 11		0	
Part	VII-A Statements Regarding Activities			
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it		Yes	
	participate or intervene in any political campaign?	<u>1a</u>		✓
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		✓_
	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.	:		ا _ ا
C	Did the foundation file Form 1120-POL for this year?	1c		-
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. ▶ \$			
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed			;
	on foundation managers ▶ \$			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		1
	If "Yes," attach a detailed description of the activities.			'
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	-	1
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		✓
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5	ļ	1
	If "Yes," attach the statement required by General Instruction T.			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:			
	 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	1	
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	7	-
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶	-		
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	1	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or		_	1
	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		/
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their	9	 	
	names and addresses	10		1

rm 99	90-PF (2013)		ı	Page 5
Part	t VII-A Statements Regarding Activities (continued)			3
1	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		1
2	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		✓
3	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	\	
	Website address ► N/A			
4		4-225-	1404	
		3202-6	677	<u></u>
5	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			
6	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?		Yes	No
	over a bank, securities, or other financial account in a foreign country?	16		✓
	the foreign country			
Dari	t VII-B Statements Regarding Activities for Which Form 4720 May Be Required	L		
K:	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?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a			
	disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes			;
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			i
	(5) Transfer any income or assets to a disqualified person (or make any of either available for			i i
	the benefit or use of a disqualified person)?			
	(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)			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fall to qualify under the exceptions described in Regulations			لـــا
	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		.
_	Organizations relying on a current notice regarding disaster assistance check here			
С	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?			ا ر - ا
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private	1c		-
-	operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
а	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?			ı
	If "Yes," list the years ▶ 20 , 20 , 20 , 20	1		
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			1
	all years listed, answer "No" and attach statement—see instructions)	2b		
С	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			· '
3а	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise			
	at any time during the year?	!		
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or			
	disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of			

the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.)

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?

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

3b

4a

4b

	0-PF (2013)								Page 6
Part	VII-B Statements Regarding Activities	for W	hich Form	4720 1	May Be R	equire	d (continued)		
5a	During the year did the foundation pay or incur at (1) Carry on propaganda, or otherwise attempt to (2) Influence the outcome of any specific public directly or indirectly, any voter registration dri	o influe election	nce legislatio	on 495	5); or to ca	arry on	☐ Yes ☑ N		
	(3) Provide a grant to an individual for travel, stud(4) Provide a grant to an organization other than section 509(a)(1), (2), or (3), or section 4940(d)	a chai	ritable, etc.,	organiz	ation desci	nbed in	1		
	(5) Provide for any purpose other than religious, purposes, or for the prevention of cruelty to compare the compared to the co		•	-	•		∏Yes ☑ No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the Regulations section 53.4945 or in a current notice in						ons described ii		
С	Organizations relying on a current notice regarding the answer is "Yes" to question 5a(4), does to because it maintained expenditure responsibility	ne four	ndation claim	exemp	otion from	the tax		_	
6a	If "Yes," attach the statement required by Regula Did the foundation, during the year, receive any fon a personal benefit contract?	funds,	directly or in			emiums 	; ∐Yes ☑ No		
b	Did the foundation, during the year, pay premium If "Yes" to 6b, file Form 8870.	ns, dire	ctly or indire	ctly, on	a personal	benefi	t contract? .	6b	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \
	At any time during the tax year, was the foundation a If "Yes," did the foundation receive any proceeds						Yes Noransaction? .	7b	
Pari	Information About Officers, Direct and Contractors List all officers, directors, trustees, foundation							mploy	rees,
	(a) Name and address	(b) Title	e, and average rs per week ed to position	(c) Cor (If n	npensation ot paid, ter -0-)	(d) emple	Contributions to byee benefit plans erred compensation) other	ense account, allowances
	s J. Drought Kilbourn Ave., #1400, Milwaukee, WI 53202-6677	Dir , Se 5.0 hrs	c , Treas		25,000	I			0
111 E		Dir., VF 5.0 hrs		-	25,000	ļ 			0
		2.0 hrs			0	-)	0
2	Compensation of five highest-paid employee	es (oth	er than tho	se incli	uded on li	ne 1–	see instruction	ns). If n	one, enter
	"NONE."			 -	<u> </u>		(d) Contributions to		
<u></u>	(a) Name and address of each employee paid more than \$50,00	0	(b) Title, and hours per devoted to p	week T	(c) Compe	nsation	employee benefit plans and deferred compensation	(e) Exp	ense account, allowances
				_	<u>-</u>				
									

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

	_
Page	7

Par	VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Em and Contractors (continued)	ployees,
3	Five highest-paid independent contractors for professional services (see instructions). If none, enter "NON	E."
	(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
Tota	number of others receiving over \$50,000 for professional services	None
Par	IX-A Summary of Direct Charitable Activities	_
	the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of nizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1		
•		(
2		
3		
4		
Par	IX-B Summary of Program-Related Investments (see instructions)	
De	cribe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1		
2		
A!!	ther program-related investments. See instructions	
Tota	Add lines 1 through 3	

1	Page	a 8

Part	Minimum Investment Return (All domestic foundations must complete this part. Foreign	gn fou	ndations,
	see instructions.)		
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes.		
а	Average monthly fair market value of securities	1a	2,957,265
b	Average of monthly cash balances	1b	91,664
С	Fair market value of all other assets (see instructions)	1c	15,000
d	Total (add lines 1a, b, and c)	1d	3,063,929
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)	_	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	3,063,929
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see	1	
	instructions)	4	45,959
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,017,970
6	Minimum investment return. Enter 5% of line 5	6	150,899
Part :	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating for and certain foreign organizations check here ► and do not complete this part.)	ounda	tions
1	Minimum investment return from Part X, line 6	1	150,899
2a	Tax on investment income for 2013 from Part VI, line 5		
b	Income tax for 2013. (This does not include the tax from Part VI) 2b		
С	Add lines 2a and 2b	2c	449
3	Distributable amount before adjustments Subtract line 2c from line 1	3	150,450
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	150,450
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	150,450
Part	XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	244,688
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
а	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	244,688
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	449
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	244,239
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating qualifies for the section 4940(e) reduction of tax in those years.	g whet	her the foundation
			Form 990-PF (2013)

art 2	XIII Undistributed Income (s	see instruction	is)		· · · · · · · · · · · · · · · · · · ·	
1	Distributable amount for 2013 fro	om Part XI,	(a) Corpus	(b) Years prior to 2012	(c) 2012	(d) 2013
	line 7					150,450
2	Undistributed income, if any, as of the			·		
а	Enter amount for 2012 only				0	
b	Total for prior years 20,20					
3	Excess distributions carryover, if a	ny, to 2013	1			1
а	From 2008	76,045				
b	From 2009	102,749				
С	From 2010	92,696				
d	From 2011	380,140				•
е	From 2012	86,303	1			A SAME
f	Total of lines 3a through e		737,933			
4	Qualifying distributions for 2013 fr	om Part XII, 🗍				
	line 4. ► \$ 244,688					1
а	Applied to 2012, but not more than	n line 2a .			0	
	Applied to undistributed income of					
	(Election required—see instruction			0		!
С	Treated as distributions out of corr	ous (Election		······		
	required - see instructions)	, ,	0			į.
d	Applied to 2013 distributable amou	⊢				150,450
	Remaining amount distributed out		94,238			
5	Excess distributions carryover app	· -	0 1/200	- 4 diam -		0
•	(If an amount appears in column (c			*		
	amount must be shown in column					-
6	Enter the net total of each indicated below:	` ' '				
_	Corpus. Add lines 3f, 4c, and 4e. Su	ibtract line 5	832,171	>-	<	!
a b	Prior years' undistributed incom		632,171			
	line 4b from line 2b					;
С	Enter the amount of prior years' u	indistributed				
·	income for which a notice of de					İ
	been issued, or on which the sec					İ
	tax has been previously assessed					•
d	Subtract line 6c from line 6					
_						1
е	Undistributed income for 2012.	Subtract line				
ŭ	4a from line 2a. Taxable a	L				
	instructions					-
f	Undistributed income for 2013. S	ubtract lines				
'	4d and 5 from line 1. This amou					
	distributed in 2014	i			-	
7	Amounts treated as distributions of	out of corpus				
•	to satisfy requirements imposed				1	
	170(b)(1)(F) or 4942(g)(3) (see instri		0			
8	Excess distributions carryover from	_				
U	applied on line 5 or line 7 (see inst		76,045			
9	Excess distributions carryove	_	76,043			
J	Subtract lines 7 and 8 from line 6a		756,126			
10	Analysis of line 9:	· · · ·	730,120			
а	Excess from 2009	102,749				
a b	Excess from 2010	92,696				
C	Excess from 2011	380,140				
d	Excess from 2012	86,303				
_	5 / 2012	94,238				
<u>e</u>	Excess from 2013	94,238				

orm 99 Part	90-PF (2013)	tions (see instri	ustions and Dan	t \/ A)\	Page 10
	XIV Private Operating Founda If the foundation has received a ruling				") 	
	foundation, and the ruling is effective for			> private operating	l N	/A
b	Check box to indicate whether the four		-	ation described in se		(3) or 4942(j)(5
2a	Enter the lesser of the adjusted net	Tax year		Prior 3 years		
	income from Part I or the minimum investment return from Part X for each year listed	(a) 2013	(b) 2012	(c) 2011	(d) 2010	(e) Total
b c	85% of line 2a		,			
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
е	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:					
а	"Assets" alternative test-enter					
	(1) Value of all assets .					
	(2) Value of assets qualifying under					
b	section 4942(j)(3)(B)(i) "Endowment" alternative test—enter ² / ₃ of minimum investment return shown in					
С	Part X, line 6 for each year listed "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					<u> </u>
Part	XV Supplementary Information			the foundation h	iad \$5,000 or m	ore in assets a
_	any time during the year-		ns.)	<u> </u>	·	
a	Information Regarding Foundation List any managers of the foundation of the foundation of the close of any tax year (but of the close o	who have contrib				by the foundation
b	N/A List any managers of the foundation	who own 10% o	or more of the sto	ock of a corporation	n (or an equally la	rae portion of the
_	ownership of a partnership or other en					g. person or m
2	Information Regarding Contribution	n, Grant, Gift, Lo	an, Scholarship,	etc., Programs:		
	Check here ▶ ☐ if the foundation	only makes cont	ributions to pres	elected charitable		
	unsolicited requests for funds If the f		gifts, grants, etc	. (see instructions)	to individuals or o	rganizations unde
	other conditions, complete items 2a,		alabasas a filtiri	A A		- dalus
а	The name, address, and telephone no	ımber or e-mail a	adress of the per	son to whom applic	ations should be a	addressed:
	Thomas J. Drought, Davis & Kuelth					414-225-1404
b	The form in which applications should	d be submitted an	d information and	d materials they sho	ould include:	
	No required format.					
	Any submission deadlines:					

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

Only 501(c)(3) organizations primarily in the greater Milwaukee, Wisconsin area.

October 31st of each year.

3	Grants and Contributions Paid During t			ure Payment	
	Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
	Name and address (home or business)	or substantial contributor	recipient	CONTIDUTION	
а	Paid during the year				
See at	tached schedule.				190,800
]		
		}			
					1
					i
	Total			▶ 3a	190,800
b	Approved for future payment				
Final	pledge payment to Museum of Wisconsin Art				5,000
				1	
		İ			
		1	1		
		[]	
				<u></u>	
	Total	<u> </u>	· · :	▶ 3b	5,000 n 990-PF (2013)
				Form	n 990-PF (2013)

Pal	Γ L Λ	MFA Analysis of Income-Producing Ac	riviries				
Ente	r gro	ess amounts unless otherwise indicated	Unrelated bu	isiness income	Excluded by secti	on 512, 513, or 514	(e)
			(a)	(b)	(c)	(d)	Related or exempt
	_		Business code	Amount	Exclusion code	Amount	function income (See instructions.)
1		gram service revenue:					
	a				ļ		
	b		<u> </u>				
	С		<u> </u>	· · · · · · · · · · · · · · · · · · ·			
	d						
	е			<u> </u>			
	f						
	g	Fees and contracts from government agencies	<u></u>				
2	Me	mbership dues and assessments .					
3	Inte	rest on savings and temporary cash investments					
4	Div	idends and interest from securities			14	56,896	
5	Net	rental income or (loss) from real estate.					
	а	Debt-financed property					
	b	Not debt-financed property					
6	Net	rental income or (loss) from personal property					
7	Oth	er investment income					
8	Gaı	n or (loss) from sales of assets other than inventory			14	10,373	
9	Net	: income or (loss) from special events					
10	Gro	oss profit or (loss) from sales of inventory					
11	Oth	ner revenue: a					
	b						
	С						
	d						
	е				İ		
	Sui	ototal. Add columns (b), (d), and (e)				67.200	
12	Oui	3101an 71aa 001an 110 (b), (d), and (d)			1	67,269	1
13	Tot	tal. Add line 12, columns (b), (d), and (e)			<u> </u>		67,269
13	Tot	al. Add line 12, columns (b), (d), and (e) ksheet in line 13 instructions to verify calculation	ns.)				
13 (See	Tot wor	tal. Add line 12, columns (b), (d), and (e)	ns.)				
13 (See Pa Lin	Tot wor t X e No	tal. Add line 12, columns (b), (d), and (e) rksheet in line 13 instructions to verify calculation VI-B Relationship of Activities to the A	ns.) Accomplishm	ent of Exemp	t Purposes	13	67,269
13 (See Pa Lin	Tot wor	tal. Add line 12, columns (b), (d), and (e) tksheet in line 13 instructions to verify calculation Relationship of Activities to the A	ns.) Accomplishm	ent of Exemp	t Purposes	13	67,269
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13 (See Pa Lin	Tot wor t X e No	tal. Add line 12, columns (b), (d), and (e) rksheet in line 13 instructions to verify calculation VI-B Relationship of Activities to the A	ns.) Accomplishm	ent of Exemp	t Purposes	13	67,269
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Part	XVII		Regarding Tran	sfers To and Transac	tions and R	elationships V	Vith Nonch	aritabl		<u>.gc . c</u>
1	in sec	ne organization d	rectly or indirectly of	engage in any of the follow section 501(c)(3) organiza					Yes	No
а	Trans (1) C	-	orting foundation to	a noncharitable exempt	organization o	of:		1a(1)		/
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b		ther assets . transactions:			• •			1a(2)		-
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				able exempt organization				1b(2)		1
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		oans or loan guar						1b(5)		✓
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С				sts, other assets, or paid e				1c		✓
d				s," complete the following				w the	fair m	arket
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2a b	desc	ribed in section 5		filiated with, or related to other than section 501(c)(0				☐ Yes	s 🗸	No
		(a) Name of organ	ization	(b) Type of organiza	ion	(c) De	scription of relati	onship		
							_			
		4								
٥.				ed this return, including accompany an taxpayer) is based on all informa				edge and	beltef, i	t is true,
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DOROTHY INBUSCH FOUNDATION, INC.

Form 990-PF, Page 3, Part IV

Part IV Capital Gains and Losses for Tax on Investment Income	Income								
	How Acquired			Ü	Gross Sales				ļ
Description	Donation)	Date Acquired	Date Sold		Price	Cost Basis		Gain (Loss)	(S
200 shares Eaton Corp PLC	Merger	08/29/2012	•	છ	10,331	\$ 9,324		1,007)7
50 shares Heartland Express Inc	Purchase	07/17/2012	01/24/2013	ઝ	899	\$ 714	4	(4)	(46)
20 shares Heartland Express Inc	Purchase	07/17/2012	01/25/2013	ss	269	\$ 286		1)	(17)
50 shares Heartland Express Inc.	Purchase	07/17/2012	01/28/2013	₩.	299	\$ 714	4	(4)	(47)
110 shares Heartland Express Inc	Purchase	07/17/2012	01/29/2013	ઝ	1,531	\$ 1,571	1 \$	(4)	(40)
20 shares Heartland Express Inc	Purchase	07/17/2012	01/30/2013	↔	280	\$ 286	8 9)	(9)
25 shares Heartland Express Inc	Purchase	07/17/2012	02/14/2013	8	348	\$ 357		()	(6)
10 shares Heartland Express Inc	Purchase	07/17/2012	02/15/2013	ક	138	\$ 143	3 \$)	(4)
10 shares Heartland Express Inc	Purchase	07/17/2012	02/20/2013	ક	139	\$ 143	3	•	<u>4</u>
10 shares Heartland Express Inc	Purchase	07/17/2012	02/21/2013	ક	139	\$ 143		•)	(4)
15 shares Heartland Express Inc	Purchase	07/17/2012	02/22/2013	ક	208	\$ 214	4)	(2)
5 shares Heartland Express Inc	Purchase	07/17/2012	02/25/2013	8	69	\$ 71	1	2)	(2)
\$20,000 JP Morgan Chase	Purchase	11/14/2012	06/13/2013	છ	20,097	\$ 20,280	\$ 0	(182)	32)
\$20,000 Wells Fargo Co	Purchase	11/14/2012	06/13/2013	↔	20,260	\$ 20,323	3 \$	(63)	33)
250 shares Freeport McMoran Copper & Gold Inc	Purchase	10/17/2012	09/19/2013	ક	8,330	\$ 10,197	_	(1,867)	()
200 shares Teva Pharmaceutical Inds Ltd	Purchase	02/05/2013	09/19/2013	s	7,626			(1)	9
20 shares Apache Corp	Purchase	07/01/2013	12/09/2013	↔	1,816	\$ 1,668	8	148	φ
20 shares PetSmart Inc.	Purchase	03/20/2013	12/09/2013	ક	1,447	\$ 1,250	\$ 0	197	7
110 shares Southwest Arrlines Co	Purchase	10/30/2013	12/09/2013	ઝ	1,985	\$ 1,899	\$ 6	98	98
30 shares Fastenal Company	Purchase	08/08/2013	12/09/2013	ક	1,401	\$ 1,480	\$ 0	(7)	(2)
10 shares PetSmart Inc	Purchase	07/01/2013	12/09/2013	↔	724	\$ 672	2	.9	51
100 shares Anheuser Busch Inbev Sponsored Adr	Purchase	08/29/2012	09/19/2013	છ	9,942	\$ 8,216		1,726	ပ္သ
50 shares International Business Machines Corp	Purchase	08/06/2012	09/19/2013	ઝ	9,724		2	(81)	£
200 shares National Oilwell Varco Inc	Purchase	08/09/2012	09/19/2013	↔	15,794	\$ 15,136	\$ 9	658	ထ္ထ
150 shares Norfolk Southern Corp	Purchase	08/09/2012	09/19/2013	↔	11,500	\$ 11,227	<u>۶</u>	273	က
100 shares Vodafone Group PLC Sponsored Adr New	Purchase	08/06/2012	09/19/2013	69	3,390		6	441	Ξ
680 shares Oracle Corp	Purchase	07/17/2012	09/23/2013	ક	22,606	\$ 19,693	3	2,913	က
150 shares Oracle Corp.	Purchase	07/17/2012	09/24/2013	\$	5,018	\$ 4,344	4 \$	674	4
185 shares Oracle Corp	Purchase	07/17/2012	09/24/2013	ક	6,208	\$ 5,358	8	851	1.
300 shares Spdr S&P 500 ETF Trust	Purchase	08/09/2012	12/06/2013	↔	53,960	\$ 41,998	8	11,963	က္လ
2,000 shares ING Groep NV 6 125% Ser Preferred Stock	Purchase	08/06/2012	12/09/2013	↔	46,361	\$ 44,611	1	1,750	9
200 shares McDonald's Corp	Purchase	08/06/2012	12/09/2013	\$	18,673	\$ 18,308	\$ 8	364	¥
90 shares Accenture PLC	Purchase	07/17/2012	12/09/2013	€>	6,846	\$ 5,168		1,677	7
30 shares Apache Corp	Purchase	07/17/2012	12/09/2013	ઝ	2,723	\$ 2,49	4	229	စ္သ

DOROTHY INBUSCH FOUNDATION, INC

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Part
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Form 5

Part IV Capital Gains and Losses for Tax on Investment Income	Income						
	How Acquired						
	(Purchase/			Gross Sales		-	_
Description	Donation)	Date Acquired	Date Sold	Price	Cost Basis	Gair	Gain (Loss)
100 shares Cognizant Tech Solutions CI A	Purchase	07/17/2012	12/09/2013	\$ 9,367	\$ 5,537	ഗ	3,831
130 shares Express Scripts Holdings Co	Purchase	07/17/2012	12/09/2013	\$ 8,664	\$ 7,274	S	1,391
10 shares Fastenal Company	Purchase	07/17/2012	12/09/2013	\$ 467	\$ 426	မှ	41
150 shares Franklin Resources Inc	Purchase	07/17/2012	12/09/2013	\$ 8,190	\$ 5,472	ઝ	2,718
10 shares Google Inc CI A	Purchase	07/17/2012	12/09/2013	\$ 10,607	\$ 5,708	8	4,899
100 shares Helmerich & Payne	Purchase	07/17/2012	12/09/2013	\$ 8,059	\$ 4,302	မှ	3,757
50 shares Jacob Engineering Group Inc	Purchase	07/17/2012	12/09/2013	\$ 2,924	\$ 1,833	8	1,091
100 shares PNC Financial Services	Purchase	07/17/2012	12/09/2013	\$ 7,613	\$ 6,044	ક્ક	1,569
120 shares TJX Companies Inc.	Purchase	07/17/2012	12/09/2013	\$ 7,440	\$ 5,309	s	2,132
40 shares UnitedHealth Group Inc	Purchase	07/24/2012	12/09/2013	\$ 2,954	\$ 2,193	မှ	761
10 shares Visa Inc. Class A	Purchase	07/17/2012	12/09/2013	\$ 2,019	\$ 1,230	ક્ક	789
Pinco Real Estate Ret Strategy C (long term capital gain)	Distribution			\$ 72	\$	\$	72
	Purchase	Various	12/31/2012	(35,217)	\$	S	(35,217)
				\$ 324,375 \$	\$ 314,002	ક્ર	10,373
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Zip Code	City State Z
53203-0092 Public Charity	lwaukee WI 53.
53202 Public Charity	WI
53233 Public Charity	Milwaukee WI
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53233-1436 Public Charity	Iwaukee WI S.
53130 Public Charity	Hales Comers WI
53204 Public Charity	lwaukee WI
53201-1997 Public Charity	I/M
53212 Public Charity	Milwaukee WI
53202 Public Charity	lwaukee WI
53212 Public Charity	lwaukee Wl
53217 Public Charity	Milwaukee WI
53186 Public Charity	aukesha W!
53528 Public Charity	Cross Plains W1
53204 Public Charity	Milwaukee Wi
53007 Public Chanty	Butler
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