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Department of the Treasury
Internal Revenue Service

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

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▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.**2013**

Open to Public Inspection

For calendar year 2013 or tax year beginning

, 2013, and ending

, 20

Name of foundation JOHN & CATHERINE SHULER CHARITABLE TRUST (23-37498)		A Employer identification number 42-6076704
Number and street (or P O box number if mail is not delivered to street address) PO BOX 803878	Room/suite	B Telephone number (see instructions)
City or town, state or province, country, and ZIP or foreign postal code CHICAGO, IL 60680		C If exemption application is pending, check here ☐
G Check all that apply	☐ Initial return ☐ Final return ☐ Address change	☐ Initial return of a former public charity ☐ Amended return ☐ Name change
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1 Foreign organizations, check here ☐ 2 Foreign organizations meeting the 85% test check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 816,230.00 (Part I, column (d) must be on cash basis)		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)					
2 Check ☐ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		21,682.00	21,682.00		
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		10,787.00			
b Gross sales price for all assets on line 6a					
7 Capital gain net income (from Part IV, line 2)			10,787.00		
8 Net short-term capital gain				264.00	
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)					
12 Total. Add lines 1 through 11		32,469.00	32,469.00	264.00	
13 Compensation of officers, directors, trustees, etc.					
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees (attach schedule)					
b Accounting fees (attach schedule)		650.00	650.00		
c Other professional fees (attach schedule)		5,490.00	5,490.00		
17 Interest					
18 Taxes (attach schedule) (see instructions)		595.00	595.00		
19 Depreciation (attach schedule) and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses (attach schedule)					
24 Total operating and administrative expenses. Add lines 13 through 23		6,735.00	6,735.00		
25 Contributions, gifts, grants paid		39,000.00			39,000.00
26 Total expenses and disbursements. Add lines 24 and 25		45,735.00	6,735.00		39,000.00
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements		-13,266.00			
b Net investment income (if negative, enter -0-)			25,734.00		
c Adjusted net income (if negative, enter -0-)				264.00	

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash - non-interest-bearing			14,296.00	10,528.00	10,528.00
	2 Savings and temporary cash investments					
	3 Accounts receivable ▶ Less: allowance for doubtful accounts ▶					
	4 Pledges receivable ▶ Less: allowance for doubtful accounts ▶					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)					
	7 Other notes and loans receivable (attach schedule) ▶ Less: allowance for doubtful accounts ▶					
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges					
	10 a Investments - U S and state government obligations (attach schedule) .					
	b Investments - corporate stock (attach schedule)			326,264.00	330,919.00	484,905.00
	c Investments - corporate bonds (attach schedule)			241,671.00	227,266.00	243,709.00
	11 Investments - land, buildings, and equipment basis Less: accumulated depreciation (attach schedule) ▶					
	12 Investments - mortgage loans					
	13 Investments - other (attach schedule)			27,186.00	27,186.00	38,582.00
	14 Land, buildings, and equipment basis Less: accumulated depreciation (attach schedule) ▶					
	15 Other assets (describe ▶)			38,775.00	38,775.00	38,506.00
	16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)			648,192.00	634,674.00	816,230.00
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 ▶)					
Net Assets or Fund Balances	23 Total liabilities (add lines 17 through 22)					
	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			648,192.00	634,674.00	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund					
	29 Retained earnings, accumulated income, endowment, or other funds . .					
	30 Total net assets or fund balances (see instructions)			648,192.00	634,674.00	
	31 Total liabilities and net assets/fund balances (see instructions)			648,192.00	634,674.00	

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	648,192.00
2 Enter amount from Part I, line 27a	2	-13,266.00
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	634,926.00
5 Decreases not included in line 2 (itemize) ▶	5	252.00
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	634,674.00

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)			(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a LONG TERM GAIN DIVIDENDS					
b SHORT TERM GAINS - SEE ATTACHED					
c LONG TERM GAINS - SEE ATTACHED					
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 3,260.00			3,260.00		
b 1,146.00		882.00	264.00		
c 38,687.00		31,424.00	7,263.00		
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a			3,260.00		
b			264.00		
c			7,263.00		
d					
e					
2 Capital gain net income or (net capital loss)			2	10,787.00	
{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }					
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)			3	264.00	
If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8					

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☐ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	36,602.00	750,640.00	0.0488
2011	40,500.00	739,854.00	0.0547
2010	32,178.00	706,983.00	0.0455
2009	37,622.00	657,630.00	0.0572
2008	41,207.00	761,027.00	0.0541
2 Total of line 1, column (d)			0.2603
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			0.0521
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5			781,048.85
5 Multiply line 4 by line 3			40,692.65
6 Enter 1% of net investment income (1% of Part I, line 27b)			257.34
7 Add lines 5 and 6			40,949.99
8 Enter qualifying distributions from Part XII, line 4			39,000.00

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

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

1 a 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	515.00
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3 Add lines 1 and 2		3	515.00
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	515.00
6 Credits/Payments			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	515.00	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d	7	515.00	
8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be Credited to 2014 estimated tax ☐ Refunded ☐	11		

Part VII-A Statements Regarding Activities

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

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions).	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address				
14	The books are in care of THE NORTHERN TRUST COMPANY Telephone no 312-630-6000 Located at PO BOX 803878, CHICAGO, IL ZIP+4 32608			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ☐ and enter the amount of tax-exempt interest received or accrued during the year. 15			
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country				

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ No	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? ☐ Yes ☒ No	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☒ No If "Yes," list the years		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions) ☐ Yes ☒ No	2b	X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013) ☐ Yes ☒ No	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? ☐ Yes ☒ No	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013? ☐ Yes ☒ No	4b	X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ NoOrganizations 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? ☐ Yes ☒ 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? ☐ Yes ☒ No**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
GIVEN CHASE 14324 WEST THORNE LANE LAKEWOOD, WA 98498	CO-TRUSTEE	0.00	0.00	0.00

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 ☐

NONE

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

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 NONE	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1 NONE	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	▶

Form **990-PF** (2013)

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	771,617.00
b	Average of monthly cash balances	1b	21,326.00
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	792,943.00
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	792,943.00
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	11,894.15
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	781,048.85
6	Minimum investment return. Enter 5% of line 5	6	39,052.44

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	39,052.44
2a	Tax on investment income for 2013 from Part VI, line 5	2a	515.00
b	Income tax for 2013 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	515.00
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	38,537.44
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	38,537.44
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	38,537.44

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	39,000.00
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	39,000.00
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	39,000.00

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				38,537.44
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e				
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 39,000.00				
a Applied to 2012, but not more than line 2a . . .				
b Applied to undistributed income of prior years (Election required - see instructions)				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2013 distributable amount				
e Remaining amount distributed out of corpus . .				
5 Excess distributions carryover applied to 2013 . (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount - see instructions				
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount - see instructions				
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				38,537.44
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions) . . .				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions) . . .				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2009 . . .				
b Excess from 2010 . . .				
c Excess from 2011 . . .				
d Excess from 2012 . . .				
e Excess from 2013 . . .				

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

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling

b Check box to indicate whether the foundation is a private operating foundation described in section

4942(j)(3) or

4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see instructions.)**1 Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

N/A

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

N/A

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

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

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

N/A

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

N/A

c Any submission deadlines

N/A

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

N/A

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year SEE ATTACHED				39,000.00
Total			3a	39,000.00
b Approved for future payment				
Total			3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities			14	21,682.00	
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	10,787.00	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory . . .					
11	Other revenue a _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal Add columns (b), (d), and (e)				32,469.00	
13	Total. Add line 12, columns (b), (d), and (e)					32,469.00

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of		
	(1) Cash	1a(1)	X
	(2) Other assets	1a(2)	X
b	Other transactions		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	X
	(3) Rental of facilities, equipment, or other assets	1b(3)	X
	(4) Reimbursement arrangements	1b(4)	X
	(5) Loans or loan guarantees	1b(5)	X
	(6) Performance of services or membership or fundraising solicitations	1b(6)	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

**Sign
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee

5/13/14
Date

TRUSTEE
Title

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

**Paid
Preparer
Use Only**

Print/Type preparer's name

ALBERT C RAWSON III

Preparer's signature

ON 11 CPA

Date

05/07/2014

Check	X	
-------	---	--

self-employed

PTIN

P00219967

Firm's name ▶ ALBERT C RAWSON III, CPA

Firm's EIN ▶ 59-2118251

Firm's address ► 808-A NW 16TH AVENUE
GAINESVILLE, FL 32601

Phone no 352-375-6608

42-6076704

JOHN & CATHERINE SHULER CHARITABLE TRUST

Supplemental Schedules

2013

Page 1, Part 1 – Analysis of Revenues & Expenses

Line 16b – Accounting Fees

Tax Preparation Fee	\$ 650
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Line 16c – Other Professional Fees

Trustee Fees	\$ 5,490
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Line 18 – Taxes

Excise Tax	\$ 273
Foreign Taxes	<u>322</u>
	595

Page 2, Part - Analysis of Change In Fund Balance

Line 3 – Other Increases

Timing Differences-Tax/Book	\$ 252
-----------------------------	--------

Part VII – A – Statements Regarding Activities

Question 8(b) No, because the Attorney General does not require
A copy of the Foundation's 990-PF.

2013 Tax Information Statement

Page 8 of 28
Ref: ROT

Payer's Name and Address:
THE NORTHERN TRUST COMPANY
P.O. BOX 803878
CHICAGO, IL 60680

Account Number: 23-37498
Recipient's Tax ID Number: XX-XXX6704
Payer's Federal ID Number: 36-7158276
Payer's State ID Number: FL
State: (941)907-2113
Questions? ☐ **Corrected** ☐ **2nd TIN notice**

Recipient's Name and Address:
SHULER CHARITABLE TRUST J & C
C/O ALBERT C RAWSON III, CPA
808A NW 16TH AVENUE
GAINESVILLE, FL 32601-4012

2013 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is Sales Price of stocks, bonds etc., less commissions and option premiums.
Covered (Box 6a is not checked)

Cusip		Description (Box 8)	Stock or Other Symbol (Box 1d)		State Tax Withheld (Box 15)
Quantity Sold (Box 1e)	Date of Sale or Exchange (Box 1a)	Date of Acquisition (Box 1b)	Stocks, Bonds, etc. (Box 2a)	Cost or Other Basis (Box 3)	Federal Income Tax Withheld (Box 4)
Short Term Sales Reported on 1099-B					
263534109	EIDU PONT DE NEMOURS & CO		DD		
20.0000	08/21/2013	12/13/2012	1,146.38	882.16	0.00
Total Short Term Sales Reported on 1099-B			1,146.38	882.16	0.00
Report on Form 8949, Part I, with Box A checked					
Long Term Sales Reported on 1099-B					
110122108	BRISTOL MYERS SQUIBB CO		BMY		
125.0000	08/21/2013	Various	5,181.15	3,758.22	0.00
665162699	MFB NORTHN HI YIELD FXD INC FD		NHFX		
1825.0700	08/21/2013	04/16/2012	13,633.26	13,250.00	0.00
Total Long Term Sales Reported on 1099-B			18,814.41	17,008.22	0.00

Report on Form 8949, Part II, with Box D checked

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. The taxpayer is ultimately responsible for the accuracy of their own tax return.

2013 Tax Information Statement

Page 9 of 28
Ref: ROT

Recipient's Name and Address:

SHULER CHARITABLE TRUST J & C
C/O ALBERT C RAWSON III, CPA
808A NW 16TH AVENUE
GAINESVILLE, FL 32601-4012

Account Number:

23-37498
XX-XXX6704
36-7158276

Recipient's Tax ID Number:

Payer's Federal ID Number:
Payer's State ID Number:
State:

Payer's Name and Address:
THE NORTHERN TRUST COMPANY
P.O. BOX 803878
CHICAGO, IL 60680

FL
(941)907-2113

Questions?

☐ Corrected

☐ 2nd TIN notice

2013 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is Sales Price of stocks, bonds, etc., less commissions and option premiums.

For noncovered securities (Box 6a is checked) shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the IRS.

Cusip	Description (Box 8)		Stock or Other Symbol (Box 1d)									
	Quantity Sold	Date of Sale or Exchange	Date of Acquisition	Stocks Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld		State Tax Withheld		
								(Box 4)	(Box 15)			
(Box 1e)	(Box 1a)			(Box 2a)								
Long Term Sales Reported on 1099-B												
25746U109		DOMINION RES INC VA NEW	D									
18.0000		01/10/2013 12/28/2010		938.57	771.84	0.00	166.73	0.00	0.00	0.00		
25746U109		DOMINION RES INC VA NEW	D									
27.0000		01/11/2013 12/28/2010		1,411.45	1,157.76	0.00	253.69	0.00	0.00	0.00		
25746U109		DOMINION RES INC VA NEW	D									
9.0000		01/14/2013 12/28/2010		472.12	385.92	0.00	86.20	0.00	0.00	0.00		
25746U109		DOMINION RES INC VA NEW	D									
14.0000		01/15/2013 12/28/2010		733.44	600.32	0.00	133.12	0.00	0.00	0.00		
478366107		JOHNSON CONTROLS INC	JCI									
75.0000		01/15/2013 09/14/2009		2,370.42	2,041.34	0.00	329.08	0.00	0.00	0.00		
25746U109		DOMINION RES INC VA NEW	D									
2.0000		01/16/2013 12/28/2010		105.00	85.76	0.00	19.24	0.00	0.00	0.00		
G5785G107		MALLINCKRODT PLC COMMON STOCK	MNK									
.2500		07/01/2013 02/04/2010		11.02	8.90	0.00	2.12	0.00	0.00	0.00		

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2013 Tax Information Statement

Page 10 of 28
Ref: ROT

Recipient's Name and Address:
SHULER CHARITABLE TRUST J & C
C/O ALBERT C RAWSON III, CPA
808A NW 16TH AVENUE
GAINESVILLE, FL 32601-4012

Account Number: 23-37498
Recipient's Tax ID Number: XX-XXX6704
Payer's Federal ID Number: 36-7158276
Payer's State ID Number: FL
State: (941)907-2113
Questions? ☐ 2nd TIN notice

Payer's Name and Address:
THE NORTHERN TRUST COMPANY
P.O. BOX 803878
CHICAGO, IL 60680

For noncovered securities (Box 6a is checked) shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the IRS.

Cusip	Description (Box 8)			Stock or Other Symbol (Box 1d)				
Quantity Sold	Date of Sale or Exchange	Date of Acquisition	Stocks Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
(Box 1e)	(Box 1a)		(Box 2a)				(Box 4)	(Box 15)
G5785G107	MALLINCKRODT PLC COMMON STOCK		MNK					
6.0000	07/15/2013	Various	250.15	180.38	0.00	69.77	0.00	0.00
263534109	E I DU PONT DE NEMOURS & CO		DD					
50.0000	08/21/2013	Various	2,865.95	1,876.38	0.00	989.57	0.00	0.00
655044105	NOBLE ENERGY INC		NBL					
50.0000	08/21/2013	Various	3,093.44	1,775.77	0.00	1,317.67	0.00	0.00
665162699	MFB NORTHN HI YIELD FXD INC FD		NHFX					
166.9000	08/21/2013	02/05/2010	1,246.74	1,154.95	0.00	91.79	0.00	0.00
847560109	SPECTRA ENERGY CORP COM STK		SE					
100.0000	08/21/2013	02/25/2008	3,348.94	2,401.14	0.00	947.80	0.00	0.00
G2554F113	COVIDIEN PLC USD0.20(POST CONSOLDTN)		COV					
50.0000	08/21/2013	Various	3,025.44	1,975.71	0.00	1,049.73	0.00	0.00
Total Long Term Sales Reported on 1099-B			19,872.68	14,416.17	0.00	5,456.51	0.00	0.00

Report on Form 9949, Part II, with Box E checked

This is important tax information and is being furnished to the Internal Revenue Service (except as indicated). If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported. For noncovered securities shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the Internal Revenue Service. The taxpayer is ultimately responsible for the accuracy of their own tax return.



Account Statement

October 1, 2013 - December 31, 2013

Account Number 23-37498
SHULER CHARIT TRUST J&C

Portfolio Summary

Equity Securities	Market Value	Change From Prior Period	Cost	Unrealized Gain/Loss	Estimated Annual Income	Yield	% of Assets
Large Cap	\$ 246,978.86	\$ 30,324.74	\$ 146,162.90	\$ 100,536.77	\$ 4,592.05	1.9%	30.3%
Mid Cap	32,124.21	(\$ 3,733.17)	19,960.60	12,163.61	405.63	1.3%	3.9%
Small Cap	26,428.76	927.71	16,327.50	10,101.26	222.22	0.8%	3.2%
International Developed	109,706.00	3,799.14	90,743.38	18,962.62	2,164.24	2.0%	13.4%
International Emerging	69,666.74	123.52	57,725.09	11,941.65	1,395.81	2.0%	8.5%
Total Equity Securities	\$ 484,904.57	\$ 31,441.94	\$ 330,919.47	\$ 153,705.91	\$ 8,779.94	1.8%	59.4%
Fixed Income Securities							
Corporate/Government	228,768.71	(\$ 765.83)	211,735.01	16,827.06	9,769.18	4.3%	28.0%
Other Bonds	14,940.19	(\$ 95.81)	15,531.00	(594.00)	146.70	1.0%	1.8%
Total Fixed Income Securities	\$ 243,708.90	(\$ 861.64)	\$ 227,266.01	\$ 16,233.06	\$ 9,915.88	4.1%	29.9%
Real Estate							
Real Estate Funds	38,581.51	(\$ 1,105.97)	27,186.01	11,395.50	1,318.66	3.4%	4.7%
Total Real Estate	\$ 38,581.51	(\$ 1,105.97)	\$ 27,186.01	\$ 11,395.50	\$ 1,318.66	3.4%	4.7%
Commodities							
Commodities	38,505.69	1,435.69	38,775.00	(1,034.00)	764.50	2.0%	4.7%
Total Commodities	\$ 38,505.69	\$ 1,435.69	\$ 38,775.00	(\$ 1,034.00)	\$ 764.50	2.0%	4.7%
Cash and Short Term Investments							
Cash	10,527.89	(\$ 28,444.52)	10,527.71	0.00	1.05	0.0%	1.3%

Continued on next page.

2013 Tax Information Statement

Account Number:

23-37498

Tax ID Number:

XX-XXX6704

Ref: ROT

SHULER CHARITABLE TRUST J & C

Payments/Receipts Made on Behalf of SHULER CHARITABLE TRUST J & C

The following transactions from the account are presented to assist you in the preparation of your individual tax return. Transactions are shown under three general headings of, where applicable, Medical Expenses, Taxes Paid and Miscellaneous. They are intended to cover those items the account paid on your behalf during the tax year that you may want to consider for your individual tax return. We recommend that you check your statement of transactions for any corrections or additions.

Miscellaneous

Date	Description	Payments	Receipts
Other Disbursements			
08/21/2013	Other Disbursements PAID UNITED STATES TREASURY PER STATEMENT DATED 08/07/2013 FOR THE BENEFIT OF	73.00	
08/21/2013	Other Disbursements PAID ALBERT C. RAWSON III, CPA PER STATEMENT DATED 08/07/2013 FOR PREPARATION OF 2012 RETURN FOR	850.00	
	Total Other Disbursements	923.00	0.00

Payments for Personal Gifts

12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO CULVER MILITARY ACADEMY 2013 GIFT FROM ALBERT AND CAROLYN RAWSON	500.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO SUMMIT FOUNDATION 2013 GIFT FROM HOLLIS SHUMWAY	2,500.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO T.E.S.S.A 2013 GIFT FROM HOLLIS SHUMWAY	2,500.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO CARE & SHARE FOOD BANK 2013 GIFT FROM HOLLIS SHUMWAY	750.00	

Important Tax Return Documents Enclosed

2013 Tax Information Statement

Account Number:

23-37498

Tax ID Number:

XX-XXX6704

Ref: ROT

SHULER CHARITABLE TRUST J & C

Payments/Receipts Made on Behalf of SHULER CHARITABLE TRUST J & C

The following transactions from the account are presented to assist you in the preparation of your individual tax return. Transactions are shown under three general headings of, where applicable, Medical Expenses, Taxes Paid and Miscellaneous. They are intended to cover those items the account paid on your behalf during the tax year that you may want to consider for your individual tax return. We recommend that you check your statement of transactions for any corrections or additions.

Miscellaneous

Date	Description	Payments	Receipts
Other Disbursements			
08/21/2013	Other Disbursements PAID UNITED STATES TREASURY PER STATEMENT DATED 08/07/2013 FOR THE BENEFIT OF	73.00	
08/21/2013	Other Disbursements PAID ALBERT C. RAWSON III, CPA PER STATEMENT DATED 08/07/2013 FOR PREPARATION OF 2012 RETURN FOR	850.00	
	Total Other Disbursements	923.00	0.00

Payments for Personal Gifts

12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO CULVER MILITARY ACADEMY 2013 GIFT FROM ALBERT AND CAROLYN RAWSON	500.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO SUMMIT FOUNDATION 2013 GIFT FROM HOLLIS SHUMWAY	2,500.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO T.E.S.S.A 2013 GIFT FROM HOLLIS SHUMWAY	2,500.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO CARE & SHARE FOOD BANK 2013 GIFT FROM HOLLIS SHUMWAY	750.00	

Important Tax Return Documents Enclosed

2013 Tax Information Statement

Account Number:

23-37498

Tax ID Number:

XX-XXX6704

Ref: ROT

SHULER CHARITABLE TRUST J & C

Date	Description	Payments	Receipts
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO HUMANE SOCIETY OF PIKES PEAK REGION 2013 GIFT FROM HOLLIS SHUMWAY	750.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO MARY BRIDGE CHILDREN'S FOUNDATION FOR THE AREA OF MOST NEED; 2013 GIFT	4,150.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO LAKEWOLD GARDENS FOR THE AREA OF MOST NEED; 2013 GIFT FROM GIVIN AND NANCY CHASE	1,700.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO FAUNA FOUNDATION FOR THE AREA OF MOST NEED; 2013 GIFT FROM GIVIN AND NANCY CHASE	1,500.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO UNITED WAY OF CENTRAL M INNESOTA FOR THE AREA OF MOST NEED; 2013 GIFT	9,750.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO SARASOTA MEMORIAL HEAL TH CARE FOUNDATION 100% FOR PSYCHIATRIC CARE SERVICES; 2013	2,400.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO FLORIDA UNITED METHODIS T CHILDREN'S HOME 2013 GIFT FROM ALBERT AND CAROLYN RAWSON	1,700.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO SALVATION ARMY 2013 GIFT FROM ALBERT AND CAROLYN RAWSON	500.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO GAINESVILLE COMMUNITY B AND 2013 GIFT FROM ALBERT AND CAROLYN RAWSON	300.00	

Important Tax Return Documents Enclosed

2013 Tax Information Statement

Account Number:

23-37498

Tax ID Number:

XX-XXX6704

Ref: ROT

SHULER CHARITABLE TRUST J & C

Date	Description	Payments	Receipts
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO FLORIDA SHERIFF'S YOUTH RANCHES 2013 GIFT FROM ALBERT AND CAROLYN RAWSON	1,000.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO THE GAINESVILLE CHAMBER ORCHESTRA 2013 GIFT FROM ALBERT AND CAROLYN RAWSON	500.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO GATOR BOOSTERS, INC 2013 GIFT FROM ALBERT AND CAROLYN RAWSON	1,000.00	
12/19/2013	Payments for Personal Gifts CHECK PAYMENT TO BIG BROTHERS BIG SISTER SMID-FLORIDA 2013 GIFT FROM ALBERT AND CAROLYN RAWSON	1,000.00	
12/30/2013	Payments for Personal Gifts CHECK PAYMENT TO OREGON FOOD BANK 2013 GIFT FROM WILLIAM M. RAWSON.	2,000.00	
12/30/2013	Payments for Personal Gifts CHECK PAYMENT TO OUTREACH IN BURNSIDE 2013 GIFT FROM WILLIAM M. RAWSON.	600.00	
12/30/2013	Payments for Personal Gifts CHECK PAYMENT TO THE OREGON STUDENT ASSOCIATION 2013 GIFT FROM WILLIAM M. RAWSON.	500.00	
12/30/2013	Payments for Personal Gifts CHECK PAYMENT TO OREGON PUBLIC BROADCASTING 2013 GIFT FROM WILLIAM M. RAWSON.	200.00	
12/30/2013	Payments for Personal Gifts CHECK PAYMENT TO RAPHAEL HOUSE OF PORTLAND 2013 GIFT FROM WILLIAM M. RAWSON.	750.00	

Important Tax Return Documents Enclosed



Account Number:
23-37498
Tax ID Number:
XX-XXX6704

Ref: ROT

2013 Tax Information Statement

SHULER CHARITABLE TRUST J & C

Date	Description	Payments	Receipts
12/30/2013	Payments for Personal Gifts CHECK PAYMENT TO PORTLAND ART MUSEUM 2013 GIFT FROM WILLIAM M. RAWSON.	1,000.00	
12/30/2013	Payments for Personal Gifts CHECK PAYMENT TO MACDONALD CENTER 2013 GIFT FROM WILLIAM M. RAWSON.	700.00	
12/30/2013	Payments for Personal Gifts CHECK PAYMENT TO PORTLAND RESCUE MISSION 2013 GIFT FROM WILLIAM M. RAWSON.	750.00	
	Total Payments for Personal Gifts	39,000.00	0.00

Total Miscellaneous

39,923.00

**Application for Extension of Time To File an
Exempt Organization Return**

OMB No 1545-1709

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

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☐
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*

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

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐

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

Enter filer's identifying number, see instructions

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions	Employer identification number (EIN) or
	JOHN & CATHERINE SHULER CHARITABLE TRUST (23-37498)	42-6076704
	Number, street, and room or suite no. If a P.O. box, see instructions	Social security number (SSN)
	PO BOX 803878	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions	
	CHICAGO, IL 60680	

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

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ► GAIL A MANUEL

Telephone No ► 941-907-2113

FAX No ► 941-907-6024

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box ☐ If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2014, to file the exempt organization return for the organization named above. The extension is for the organization's return for
- ☒ calendar year 2013 or
- ☐ tax year beginning _____, 20____, and ending _____, 20____

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	515.00
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	515.00

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

For Privacy Act and Paperwork Reduction Act Notice, see instructions.

Form **8868** (Rev. 1-2014)