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## Return of Private Foundation

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](http://www.irs.gov/form990pf).

2013

Open to Public Inspection

For calendar year 2013 or tax year beginning JUL 1, 2013, and ending JUN 30, 2014

Name of foundation <b>PUKALL LUMBER FOUNDATION, INC.</b>		A Employer identification number <b>23-7396586</b>
Number and street (or P O box number if mail is not delivered to street address) <b>10894 HWY 70 EAST</b>	Room/suite	B Telephone number <b>715-356-3252</b>
City or town, state or province, country, and ZIP or foreign postal code <b>ARBOR VITAE, WI 54568</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 704,910.</b> (Part I, column (d) must be on cash basis.)	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(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	40,455.		N/A	
2	Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	21,311.	21,311.		STATEMENT 1
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	-1,541.			
b	Gross sales price for all assets on line 6a	195,305.			
7	Capital gain net income (from Part IV, line 2)		0.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss)				
11	Other income				
12	Total. Add lines 1 through 11	60,225.	21,311.		
13	Compensation of officers, directors, trustees, etc	0.	0.		0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees				
b	Accounting fees	575.	0.		575.
c	Other professional fees	5,474.	5,474.		0.
17	Interest				
18	Taxes	999.	0.		0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses	83.	0.		83.
24	Total operating and administrative expenses. Add lines 13 through 23	7,131.	5,474.		658.
25	Contributions, gifts, grants paid	31,905.			31,905.
26	Total expenses and disbursements. Add lines 24 and 25	39,036.	5,474.		32,563.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	21,189.			
b	Net investment income (if negative, enter -0-)		15,837.		
c	Adjusted net income (if negative, enter -0-)			N/A	

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only			Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value			
Assets	1	Cash - non-interest-bearing		16,479.	19,497.	19,497.	
	2	Savings and temporary cash investments		23,331.	11,803.	11,803.	
	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					
	7	Other notes and loans receivable ▶					
		Less: allowance for doubtful accounts ▶					
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges					
	10a	Investments - U.S. and state government obligations					
	b	Investments - corporate stock					
	c	Investments - corporate bonds STMT 6	50,004.	50,003.	53,241.		
	11	Investments - land, buildings, and equipment basis ▶					
	Less accumulated depreciation ▶						
12	Investments - mortgage loans						
13	Investments - other STMT 7	546,209.	575,909.	620,369.			
14	Land, buildings, and equipment: basis ▶						
	Less accumulated depreciation ▶						
15	Other assets (describe ▶)						
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item 1)	636,023.	657,212.	704,910.			
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					
	22	Other liabilities (describe ▶)					
	23	Total liabilities (add lines 17 through 22)	0.	0.			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>						
	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 ▶ <input checked="" type="checkbox"/>						
	and complete lines 27 through 31.						
	27	Capital stock, trust principal, or current funds	0.	0.			
28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.				
29	Retained earnings, accumulated income, endowment, or other funds	636,023.	657,212.				
30	Total net assets or fund balances	636,023.	657,212.				
31	Total liabilities and net assets/fund balances	636,023.	657,212.				

## 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	636,023.
2	Enter amount from Part I, line 27a	2	21,189.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	657,212.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	657,212.

**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.)
<b>1a PUBLICLY TRADED SECURITIES</b>		<b>P</b>	<b>VARIOUS</b>	<b>VARIOUS</b>
b				
c				
d				
e				

  

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 195,305.		196,846.	-1,541.
b			
c			
d			
e			

  

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-1,541.
b			
c			
d			
e			

  

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	-1,541.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

**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	30,674.	649,315.	.047241
2011	31,491.	631,076.	.049900
2010	32,651.	647,353.	.050438
2009	27,570.	656,658.	.041985
2008	32,463.	622,611.	.052140

  

2 Total of line 1, column (d)	2	.241704
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.048341
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	675,998.
5 Multiply line 4 by line 3	5	32,678.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	158.
7 Add lines 5 and 6	7	32,836.
8 Enter qualifying distributions from Part XII, line 4	8	32,563.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	317.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		3	317.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	317.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	640.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	640.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	323.	
11 Enter the amount of line 10 to be: Credited to 2014 estimated tax	11	0.	

**Part VII-A Statements Regarding Activities**

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

N/A

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	X	
14	The books are in care of ► <u>SUE PUKALL</u> Located at ► <u>WOODRUFF, WI</u>	Telephone no. ►	<u>715-356-3252</u>	
		ZIP+4 ►	<u>54568</u>	
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	<u>N/A</u>	
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No X

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	<u>N/A</u>	
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?		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? If "Yes," list the years ►	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	<u>N/A</u>	
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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.)	<u>N/A</u>	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		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)? ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

6b

X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(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
ROGER PUKALL ARBOR VITAE, WI	DIRECTOR			
	0.25	0.	0.	0.
MARY E. PUKALL ARBOR VITAE, WI	DIRECTOR			
	0.25	0.	0.	0.
SUSAN C. PUKALL ARBOR VITAE, WI	DIRECTOR			
	0.25	0.	0.	0.
DEBRA J. CHRISTENSEN BLOOMINGTON, MN	DIRECTOR			
	0.25	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

0

Form 990-PF (2013)

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

**(c) Compensation**

[illegible]

0

## Summary of Direct Charitable Activities

## Expenses

1

SEE STATEMENT 8

0.

2

3

4

### Summary of Program-Related Investments

Amount

1

N/A

2

All other program-related investments. See instructions.

**3**

0.



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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a Average monthly fair market value of securities	1a	644,045.
b Average of monthly cash balances	1b	42,247.
c Fair market value of all other assets	1c	
d Total (add lines 1a, b, and c)	1d	686,292.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	686,292.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	10,294.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	675,998.
6 Minimum investment return. Enter 5% of line 5	6	33,800.

**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	33,800.
2a Tax on investment income for 2013 from Part VI, line 5	2a	317.
b Income tax for 2013. (This does not include the tax from Part VI.)	2b	
c Add lines 2a and 2b	2c	317.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	33,483.
4 Recoveries of amounts treated as qualifying distributions	4	0.
5 Add lines 3 and 4	5	33,483.
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	33,483.

**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	32,563.
b Program-related investments - total from Part IX-B	1b	0.
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the:		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	32,563.
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	5	0.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	32,563.

**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
<b>1</b> Distributable amount for 2013 from Part XI, line 7				33,483.
<b>2</b> Undistributed income, if any, as of the end of 2013				
<b>a</b> Enter amount for 2012 only			0.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2013:				
<b>a</b> From 2008				
<b>b</b> From 2009				
<b>c</b> From 2010				
<b>d</b> From 2011	106.			
<b>e</b> From 2012				
<b>f</b> Total of lines 3a through e	106.			
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4: ▶ \$	32,563.			
<b>a</b> Applied to 2012, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2013 distributable amount				32,563.
<b>e</b> Remaining amount distributed out of corpus	0.			
<b>5</b> Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))	106.			106.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				814.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
<b>8</b> Excess distributions carryover from 2008 not applied on line 5 or line 7	0.			
<b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	0.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2009				
<b>b</b> Excess from 2010				
<b>c</b> Excess from 2011				
<b>d</b> Excess from 2012				
<b>e</b> Excess from 2013				

## N/A

- ☐ 4942(1)(3) or ☐ 4942(1)(5)

- [illegible]

## 1 Information Regarding Foundation Managers:

- NONE

- NONE

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

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





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

- |          |  | Yes          | No       |
|----------|--|--------------|----------|
| <b>1</b> | 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?  |              |          |
| <b>a</b> | Transfers from the reporting foundation to a noncharitable exempt organization of:   |              |          |
|          | (1) Cash   | <b>1a(1)</b> | <b>X</b> |
|          | (2) Other assets   | <b>1a(2)</b> | <b>X</b> |
| <b>b</b> | Other transactions:  |              |          |
|          | (1) Sales of assets to a noncharitable exempt organization   | <b>1b(1)</b> | <b>X</b> |
|          | (2) Purchases of assets from a noncharitable exempt organization   | <b>1b(2)</b> | <b>X</b> |
|          | (3) Rental of facilities, equipment, or other assets   | <b>1b(3)</b> | <b>X</b> |
|          | (4) Reimbursement arrangements   | <b>1b(4)</b> | <b>X</b> |
|          | (5) Loans or loan guarantees   | <b>1b(5)</b> | <b>X</b> |
|          | (6) Performance of services or membership or fundraising solicitations   | <b>1b(6)</b> | <b>X</b> |
| <b>c</b> | Sharing of facilities, equipment, mailing lists, other assets, or paid employees   | <b>1c</b>    | <b>X</b> |
| <b>d</b> | 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
N/A		

**Sign  
Here**

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

May the IRS discuss this return with the preparer shown below (see instr)?

☒ Yes ☐ No

Signature of officer or trustee

14/13/14  
Date

Director

Signature of officer or trustee

Date \_\_\_\_\_

Title \_\_\_\_\_

Print/Type preparer's name

Preparer's signature

Date \_\_\_\_\_

Check ☐ self-employed

PTIN

**Paid  
Preparer  
Use Only**

MARY A. COATES, C

MARY A. COATES, C

11/10/14

P00134220

Firm's name ► WIPFLI LLP

Firm's EIN ▶ 39-0758449

Firm's address ► PO BOX 8010

WAUSAU, WI 54402-8010

Phone no. 715-845-3111

Form **990-PF** (2013)

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

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

OMB No 1545-0047

**2013**

Name of the organization

Employer identification number

PUKALL LUMBER FOUNDATION, INC.

23-7396586

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)( ) (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions**General Rule**

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

**Special Rules**

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$ \_\_\_\_\_

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

**LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2013)**

Name of organization

Employer identification number

**PUKALL LUMBER FOUNDATION, INC.****23-7396586****Part I Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>1</u>	<u>PUKALL LUMBER</u> <u>10894 HWY 70E</u> <u>ARBOR VITAE, WI 54568</u>	\$ <u>40,455.</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)



Employer identification number

23-7396586

[illegible]

Name of organization

Employer identification number

**PUKALL LUMBER FOUNDATION, INC.****23-7396586****Part III**

*Exclusively* religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once) ► \$

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

Pukall Lumber Foundation, Inc.  
Form 990PF, Part XV - Grants and Contributions Paid During the Year  
6/30/2014

Recipient Name and Address	Date of Grant or Contribution	Foundation Status of Recipient	Purpose of Grant or Contribution	2014
Alzheimer's Association of Greater 8A West Davenport St. Rhineland, WI 54501	3/26/2014	Public Charity	General Fund	350
American Legion Aux. of Mercer & M. V PO Box 474 Mercer, WI 54547	5/21/2014	Public Charity	General Fund	150
American Lung Assoc. of Wisc. 13100 W. Lisbon Rd., Suite 700 Brookfield, WI 53005	11/19/2013	Public Charity	General Fund	500
American Red Cross - Northcentral Wisc 1602 2nd St. Wausau, WI 54403	5/21/2014	Public Charity	General Fund Haitian Relief	1000
Angel on My Shoulder (Cancer support)	2/20/2014	Public Charity	General Fund	150
Arbor Vitae Volunteer Fire Dept. 10672 Big Arbor Vitae Dr. Arbor Vitae, WI	4/24/2014	Municipality	General Fund	1000
Ascension Lutheran PO Box 940 Minocqua, WI 54548	4/24/2014		General Fund Building Fund	1000
Big Arbor Vitae Lake Association 1874 Buckhorn Rd. Arbor Vitae, WI 54568	5/19/2014	Public Charity	General Fund	500
Boulder Junction Community Center Bldg Fund PO Box 204		Public Charity	Building Fund	2500
Boulder Junction Volunteer Fire Dept. PO Box 395 Boulder Junction, WI 54512	4/28/2014	Municipality	General Fund	500
Boy Scouts of America, Samoset Council 3511 Camp Phillips Rd. Weston, WI 54476	5/21/2014	Public Charity	General Fund	300

Pukall Lumber Foundation, Inc.  
Form 990PF, Part XV - Grants and Contributions Paid During the Year  
6/30/2014

Recipient Name and Address	Date of Grant or Contribution	Foundation Status of Recipient	Purpose of Grant or Contribution	2014
Calvary Lutheran Church po Box 63 Minocqua, WI	4/28/2014	Public Charity	General Fund	1500
Camp Jorn YMCA Manitowish Waters, WI 54545		Public Charity	General Fund building fund	1000
Camp Manitowish YMCA PO Box 246 Boulder Junction, WI 54512	4/24/2014	Public Charity	General Fund	300
Camp Nawakwa YMCA 13400 Camp Nawakwa Lane Lac du Flambeau, WI 54538	4/2/2014	Public Charity	General Fund	300
Campanile Center for the Arts PO Box 905 Minocqua, WI 54548	4/28/2014	Public Charity	General Fund	500
Care PO Box 1871 Merrifield, VA 22116	4/24/2014	Public Charity	General Fund	500
Charity Navigator 139 Harristown Rd Suite 101 Glen Rock, NJ 07452	11/19/2013	Public Charity	General Fund	50
Dr. Kate Hospice PO Box 770 Woodruff, WI	7/8/2013	Public Charity	General Fund	500
Easter Seals Wisc. 101 Nob Hill Rd, Suite 301 Madison, WI 53713	4/24/2014	Public Charity	General Fund	250
Girl Scouts of Northwestern Great Lakes 3511 Camp Phillips Rd. Schofield, WI 54476	5/21/2014	Public Charity	General Fund	300
Girls on the Run Northwoods PO Box 1231 Minocqua	8/28/2013	Public Charity	General Fund	500

Pukall Lumber Foundation, Inc.  
Form 990PF, Part XV - Grants and Contributions Paid During the Year  
6/30/2014

Recipient Name and Address	Date of Grant or Contribution	Foundation Status of Recipient	Purpose of Grant or Contribution	2014
Howard Young Foundation PO Box 470 Woodruff, WI 54568	4/28/2014	Public Charity	General Fund	1000
Humane Society - Vilas Cty PO Box 904 Eagle River, WI 54521	5/21/2014	Public Charity	General Fund	400
International Rescue Committee 122 East 42nd St. New York, NY 10168	11/19/2013	Public Charity	General Fund	750
Ironwood Theatre Center for the Arts PO Box 187 Ironwood, MI 49938	12/4/2013	Public Charity	General Fund	250
Wisc. Jaycees PO Box 484 Wisconsin Rapids, WI 54495	9/23/2013	Public Charity	General Fund	120
Lakeland Performing Arts Foundation PO Box 1279 Minocqua, WI	5/26/2014	Public Charity	General Fund	500
Lakeland Rotary Foundation Minocqua, WI	10/3/2013	Public Charity	General Fund Global Polio Eradication Haiti Relief Fund	750
Lakeland Sharing Foundation PO Box 1536 Woodruff, WI	11/19/2013	Public Charity	General Fund	350
LUHS Minocqua, WI	7/11/2013	Municipality	General Fund	100 120
Leigh Yawkey Woodson Art Museum 700 N. 12th St. Wausau, WI 55403	11/19/2013	Public Charity	General Fund	350

Pukall Lumber Foundation, Inc.  
Form 990PF, Part XV - Grants and Contributions Paid During the Year  
6/30/2014

Recipient Name and Address	Date of Grant or Contribution	Foundation Status of Recipient	Purpose of Grant or Contribution	2014
Little Rice Fire Dept. 3737 Cty Y Tomahawk, WI 54487	6/17/2014	Municipality	General Fund	250
Manito Art League PO Box 298 Manitowish Waters, WI 54545	5/21/2014	Public Charity	General Fund	300
Manitowish Waters Bike Trail PO Box 326 Manitowish Waters, WI 54545	7/19/2013	Public Charity	General Fund	500
Manitowish Waters Vol. Fire Dept PO Box 367 Manitowish Waters, WI 54545	4/28/2014	Municipality	General Fund	500
Minocqua Gun Club PO Box 403 Minocqua, WI	7/11/2013		General Fund	750
Nicolet College Foundation PO Box 518 Rhinelander, WI 54501	12/12/2013	Public Charity	Scholarship Fund Building Trades/Carpentry	500
North Lakeland Discovery Center PO Box 237 Manitowish Waters, WI 54545	2/11/2014	Public Charity	General Fund	500
North Lakeland Education Fdn. Manitowish Waters, WI 54545	11/19/2013	Public Charity	General Fund	250
Northwoods Alliance for Temporary Ho PO Box 54501 Rhinelander, WI 54501	1/6/2014	Public Charity	General Fund	500
Northwoods Wildlife Center 8683 Blumenstein Rd. Minocqua, WI	11/19/2013 5/21/2014	Public Charity	General Fund Building Fund	500 250

Pukall Lumber Foundation, Inc.  
Form 990PF, Part XV - Grants and Contributions Paid During the Year  
6/30/2014

Recipient Name and Address	Date of Grant or Contribution	Foundation Status of Recipient	Purpose of Grant or Contribution	2014
Plum Lake Ambulance PO Box 7 Sayner, WI 54560	9/19/2013	Municipality	General Fund	250
Plum Lake Fire Department PO Box 246 Sayner, WI 54560	4/28/2014	Municipality	General Fund	500
Presque Isle Fire Department Presque Isle, WI 54557	4/28/2014	Public Charity	General Fund	500
Presque Isle Lions club Presque Isle, WI 54557	4/15/2014		General Fund	450
Raptor Education Group, Inc (Wildlife R PO Box 481 Antigo, WI 54409	12/13/2013	Public Charity	General Fund	300
Salvation Army of Wisc & Upper MI PO Box 428 Wausau, WI 54402	12/13/2013 +	Public Charity	General Fund Haitian Relief	750
Sherman Vol. Fire Dept & Auxilary 2817 n. flowage Rd. Sherman, WI 54552	7/16/2013	Municipality	General Fund	250
Smile Train PO Box 96231 Washington, DC 20090	3/31/2014	Public Charity	General Fund	100
Special Olympics Wisconsin PO Box 8546, Madison, WI	3/19/2014	Public Charity	General Fund Summer Games	300
St. Germain Fire Dept po Box 216 St. Germain, WI 54558	3/18/2014	Municipality	General Fund	500
St. Jude Children's Hospital	11/19/2013	Public Charity	General Fund	250
Susan G. Komen Central Wisc. Affiliate PO box 187 Wausau, WI 54402	7/23/2013	Public Charity	General Fund	300

Pukall Lumber Foundation, Inc.  
Form 990PF, Part XV - Grants and Contributions Paid During the Year  
6/30/2014

Recipient Name and Address	Date of Grant or Contribution	Foundation Status of Recipient	Purpose of Grant or Contribution	2014
VFW Post 7898 PO Box 1634 Woodruff, WI 54568	12/11/2013	Public Charity	General Fund	250
Vilas Cty Econ Dvlpmnt Corp PO Box 1621 Eagle River, WI 54521	10/1/2013	Municipality	General Fund	1000
Wausau Performing Arts Foundation PO Box 1553, Wausau 55402	4/22/2014	Public Charity	General Fund	300
Wisc. Deputy Sheriff Assn	2/20/2014		General Fund	200
Wisc Kids Snow-Mo Racing Assn 503 Shenandoah Ridge Rd. Wausau, WI	11/7/2013			300
Wisconsin Public Television 821 University Ave. Madison, WI 53706		Public Charity	Wisc. Program Fund general fund	500
Woodruff Fire Department PO Box 177 Woodruff, WI	4/28/2014	Municipality	General Fund	750
Woods & Waters Fine Arts Council 54 Heritage Lane Park Falls, WI 54552	12/11/2013	Public Charity	General Fund	250
Wounded Warriors Project	5/19/2014 1/31/2014	Public Charity	General Fund	100 100
WTC Wisc Tech College Fdn 1000 W. Campus Dr. Wausau, WI 54401	4/23/2014	Public Charity	General Fund	200
WXPR Public Radio 303 W. Prospect St. Rhinelander, WI 54501	11/19/2013	Public Charity	General Fund	365

Total Contribution: \$ 31,905

STATEMENT \_\_\_\_\_



FORM 990-PF		DIVIDENDS AND INTEREST FROM SECURITIES			STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	
PORTFOLIO INCOME	21,311.	0.	21,311.	21,311.		
TO PART I, LINE 4	21,311.	0.	21,311.	21,311.		

FORM 990-PF		ACCOUNTING FEES			STATEMENT	2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
ACCOUNTING FEES	575.	0.		575.		
TO FORM 990-PF, PG 1, LN 16B	575.	0.		575.		

FORM 990-PF		OTHER PROFESSIONAL FEES			STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
PORTFOLIO MANAGEMENT FEES	5,474.	5,474.		0.		
TO FORM 990-PF, PG 1, LN 16C	5,474.	5,474.		0.		

FORM 990-PF		TAXES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
FEDERAL EXCISE TAX	999.	0.		0.		
TO FORM 990-PF, PG 1, LN 18	999.	0.		0.		

FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ANNUAL REPORT FILING FEE	10.	0.		10.	
CHECKS	73.	0.		73.	
TO FORM 990-PF, PG 1, LN 23	83.	0.		83.	

FORM 990-PF	CORPORATE BONDS		STATEMENT	6
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
BANK AMER CORP SR INTNOTES BE	20,001.	20,811.		
BANK AMER CORP SR INTNOTES BE	30,002.	32,430.		
TOTAL TO FORM 990-PF, PART II, LINE 10C	50,003.	53,241.		

FORM 990-PF	OTHER INVESTMENTS		STATEMENT	7
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
SPDR S&P 500 ETF TRUST UNIT SER	COST	27,239.	33,860.	
BLACKROCK US OPPORT INSTL CLASS	COST	21,880.	22,243.	
COHEN & STEERS REALTY	COST	5,665.	6,717.	
DELAWARE EMERGING MKTS	COST	6,316.	6,891.	
GOLDMAN SACHS EMERGING MKTS	COST	8,290.	8,216.	
OAKMARK FUND	COST	22,265.	32,644.	
JPMORGAN EMERGING MARKETS	COST	6,353.	6,446.	
JPMORGAN INTERNATL VALUE SELECT	COST	0.	0.	
JPMORGAN MID CAP EQUITY FUND	COST	9,543.	13,450.	
JPMORGAN US EQUITY FUND SELECT	COST	24,640.	34,163.	
THORNBURG INTL VALUE CL INSTL	COST	11,037.	12,579.	
JPMORGAN CORE BOND SELECT SHARES	COST	42,931.	43,590.	
JPMORGAN HIGH YIELD BOND FUND	COST	19,155.	18,957.	
JPMORGAN SHORT DURATION BOND	COST	60,395.	60,355.	
MFS SER TR X EMERGING MARKET	COST	8,038.	8,188.	
T ROWE PRICE NEW INCOME	COST	46,667.	46,973.	
ISHARES TRUST RUSSELL 2000	COST	13,030.	16,158.	
VANGUARD SECTOR INDEX FDS	COST	0.	0.	
DREYFUS EMERGING MARKETS	COST	0.	0.	
FEDERATED INSTITUTIONAL HIGH	COST	18,623.	18,941.	

JOHN HANCOCK INCOME FUND	COST	12,918.	12,638.
MASSACHUSETTS INVESTORS	COST	21,562.	25,610.
MFS RESEARCH INTERNATIONAL	COST	14,314.	15,775.
PIMCO TOTAL RETURN FUND	COST	16,332.	15,891.
TRANSAMERICA HIGH YIELD BOND	COST	6,430.	6,331.
VANGUARD BD INDEX FD INC	COST	51,215.	51,169.
ISHARES MSCI EAFE ETF	COST	18,045.	19,007.
PIMCO SHORT TERM FUND	COST	83,026.	83,577.
TOTAL TO FORM 990-PF, PART II, LINE 13		575,909.	620,369.

FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT	8
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ACTIVITY ONE

GIFTS, CONTRIBUTIONS, SCHOLARSHIPS, AND OTHER GRANTS THAT ARE OF A GENERAL NATURE TO QUALIFYING ORGANIZATIONS IN THE WOODRUFF AND MINOCQUA, WISCONSIN AREA. THE LISTING OF GRANTS INDICATES THE VARYING DEGREES OF BENEFICIARIES

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 1

0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION  
PART XV, LINES 2A THROUGH 2D

STATEMENT 9

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

SUSAN PUKALL  
AV 10894 HWY 70E  
WOODRUFF, WI 54568

TELEPHONE NUMBER

715-356-3252

FORM AND CONTENT OF APPLICATIONS

LETTER EXPLAINING THE PURPOSE OF ORGANIZATION AND GRANT REQUEST. COPY OF  
EXEMPT STATUS CERTIFICATE.

ANY SUBMISSION DEADLINES

NONE.

RESTRICTIONS AND LIMITATIONS ON AWARDS

GRANTS ARE NORMALLY RESTRICTED TO ORGANIZATIONS IN THE NORTH CENTRAL  
WISCONSIN AREA.