Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

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

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 07-01-2013 , and ending 06-30-2014

Name of foundation
THE KAHLERT FOUNDATION INC

A Employer identification number
52-1798711

Number and street (or P O box number if mail is not delivered to street address)
PO BOX 1701 1363 PROGRESS WAY

Room/suite

B Telephone number (see instructions)
(443) 745-6571

City or town, state or province, country, and ZIP or foreign postal code
SYKESVILLE, MD 21784

C If exemption application is pending, check here ▶ ☐

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

D 1. Foreign organizations, check here ▶ ☐

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

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 192,570,379

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

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

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

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	79,459,367			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	154	154		
	4	Dividends and interest from securities.	431,105	431,105		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	478,859			
	b	Gross sales price for all assets on line 6a 15,289,808				
	7	Capital gain net income (from Part IV, line 2) . . .		478,859		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	78	78		
	12	**Total.** Add lines 1 through 11	80,369,563	910,196		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	125,000	0		125,000
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	15,850	15,850		0
	c	Other professional fees (attach schedule)	73,369	73,369		0
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	3,403	834		0
	19	Depreciation (attach schedule) and depletion . . .				
	20	Occupancy				
	21	Travel, conferences, and meetings	4,148	4,148		0
	22	Printing and publications				
	23	Other expenses (attach schedule)	1,057	1,057		0
	24	**Total operating and administrative expenses.** Add lines 13 through 23	222,827	95,258		125,000
	25	Contributions, gifts, grants paid	3,313,000			3,313,000
	26	**Total expenses and disbursements.** Add lines 24 and 25	3,535,827	95,258		3,438,000
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	76,833,736			
	b	**Net investment income** (if negative, enter -0-)		814,938		
	c	**Adjusted net income** (if negative, enter -0-) . . .				

Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	122,153	1,060,746	1,060,746
	2	Savings and temporary cash investments	636,742	2,125,004	2,125,004
	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	1,121	2,600	2,600
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	16,205,827	87,858,284	184,269,153
	c	Investments—corporate bonds (attach schedule)	2,407,620	5,160,565	5,112,876
	11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	19,373,463	96,207,199	192,570,379
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	0	0	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here** ▶ ☐ **and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☑ **and complete lines 27 through 31.**			
	27	Capital stock, trust principal, or current funds	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	19,373,463	96,207,199	
	30	**Total net assets or fund balances** (see page 17 of the instructions)	19,373,463	96,207,199	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	19,373,463	96,207,199	

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	19,373,463
2	Enter amount from Part I, line 27a	2	76,833,736
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	96,207,199
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	96,207,199

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	PUBLICLY TRADED SECURITIES			
b	PUBLICLY TRADED SECURITIES			
c	CAPITAL GAINS DIVIDENDS	P		
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	10,916,569		10,796,341	120,228
b	4,197,068		4,014,608	182,460
c	176,171			176,171
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				120,228
b				182,460
c				176,171
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	478,859
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	1,251,431	11,757,296	0 106439
2011	200,401	3,280,819	0 061083
2010	10,000	2,073,138	0 004824
2009	103,521	1,767,047	0 058584
2008	79,811	1,567,798	0 050906

2	**Total** of line 1, column (d).	2	0 281836
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 056367
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	86,396,110
5	Multiply line 4 by line 3.	5	4,869,890
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	8,149
7	Add lines 5 and 6.	7	4,878,039
8	Enter qualifying distributions from Part XII, line 4.	8	3,438,000

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

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ____________ **(attach copy of letter if necessary–see instructions)**		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b	1	16,299
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	0
3	Add lines 1 and 2	3	16,299
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	16,299
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013 — 6a: 2,600		
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	2,600
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	13,699
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be **Credited to 2014 estimated tax** ▶ **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ 0 **(2)** On foundation managers ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶MD			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10	Yes	

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

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

Website address ▶N/A

14 The books are in care of ▶THE FOUNDATION Telephone no ▶(443) 745-6571

Located at ▶PO BOX 1701 1363 PROGRESS WAY SYKESVILLE MD ZIP+4 ▶21784

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 |

			Yes	No
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		No
	See instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ▶			

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

	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☑ No			
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☑ Yes ☐ No			
b	If "Yes," did it have excess business holdings in 2013 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.)*	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

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

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

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

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

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
See Additional Data Table				

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

(a) Name and address of each employee paid more than $50,000	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
NONE				
Total number of other employees paid over $50,000 ▶				0

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
NONE		
Total number of others receiving over $50,000 for professional services . . . . ▶		0

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

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See page 24 of the instructions **3**	
Total. Add lines 1 through 3 . . . . ▶	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	85,334,723
b	Average of monthly cash balances	1b	2,375,669
c	Fair market value of all other assets (see instructions)	1c	1,395
d	**Total** (add lines 1a, b, and c)	1d	87,711,787
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	87,711,787
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,315,677
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	86,396,110
6	**Minimum investment return.** Enter 5% of line 5	6	4,319,806

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	4,319,806
2a	Tax on investment income for 2013 from Part VI, line 5 — 2a: 16,299		
b	Income tax for 2013 (This does not include the tax from Part VI) — 2b:		
c	Add lines 2a and 2b	2c	16,299
3	Distributable amount before adjustments Subtract line 2c from line 1	3	4,303,507
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	4,303,507
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	4,303,507

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	3,438,000
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	3,438,000
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5	0
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	3,438,000

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					4,303,507
2 Undistributed income, if any, as of the end of 2013					
a Enter amount for 2012 only.				0	
b Total for prior years 20___ , 20___ , 20___			0		
3 Excess distributions carryover, if any, to 2013					
a From 2008.					
b From 2009.					
c From 2010.					
d From 2011.					
e From 2012.	635,286				
f Total of lines 3a through e.		635,286			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ $ 3,438,000					
a Applied to 2012, but not more than line 2a				0	
b Applied to undistributed income of prior years (Election required—see instructions).			0		
c Treated as distributions out of corpus (Election required—see instructions).		0			
d Applied to 2013 distributable amount.					3,438,000
e Remaining amount distributed out of corpus		0			
5 Excess distributions carryover applied to 2013 *(If an amount appears in column (d), the same amount must be shown in column (a).)*		635,286			635,286
6 Enter the net total of each column as indicated below:					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		0			
b Prior years' undistributed income Subtract line 4b from line 2b			0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.			0		
d Subtract line 6c from line 6b Taxable amount —see instructions			0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions				0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014					230,221
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)		0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions) . . .		0			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a		0			
10 Analysis of line 9					
a Excess from 2009. . . .					
b Excess from 2010. . . .					
c Excess from 2011. . . .					
d Excess from 2012. . . .					
e Excess from 2013. . . .					

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

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

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Part XV Supplementary Information (Complete this part only if the organization had $5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

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

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

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

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

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

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

c Any submission deadlines

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

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				3,313,000
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		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			14	154	
4 Dividends and interest from securities			14	431,105	
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			14	78	
8 Gain or (loss) from sales of assets other than inventory			18	478,859	
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)		0		910,196	0

13 Total. Add line 12, columns (b), (d), and (e) 13 910,196

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

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

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line No	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

b If "Yes," complete the following schedule

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

Sign Here

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

****** | 2014-11-12 | ******

Signature of officer or trustee | Date | Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
ROBERTA WILSON CPA				P00280193
Firm's name ▶ GARY R BOZEL & ASSOCIATES PA			Firm's EIN ▶ 52-1358943	
Firm's address ▶ 501 WASHINGTON AVE ST 300 TOWSON, MD 212044536			Phone no (410) 583-7900	

Form 990PF Part VIII Line 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
GREG W KAHLERT 5848 PINE BROOK FARM ROAD SYKESVILLE, MD 21784	PRESIDENT 3 00	125,000	0	0
HAROLD W WALSH 5151 ALLENDALE LANE TANEYTOWN, MD 21787	VICE PRESIDENT 1 00	0	0	0
JAMES D STONE 29 WEST SUSQUEHANNA AVENUE TOWSON, MD 21204	SECRETARY 1 00	0	0	0
ROBERT F WILSON 1818 POT SPRING ROAD LUTHERVILLE, MD 21093	TREASURER 1 00	0	0	0
ROBERTA KAHLERT 5848 PINE BROOK FARM ROAD SYKESVILLE, MD 21784	DIRECTOR 1 00	0	0	0
RONALD F TUTRONE JR 6535 NORTH CHARLES STREET TOWSON, MD 21204	DIRECTOR 1 00	0	0	0

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
ACCESS CARROLL INC 2 LOCUST LANE SUITE 301 WESTMINSTER, MD 21157		PC	PRIMARY HEALTHCARE FOR UNINSURED, LOW-INCOME RESIDENTS OF CARROLL COUNTY	85,000
AMERICAN DIABETES ASSOCIATION 1701 N BEAUREGARD STREET ALEXANDRIA, VA 22311		PC	TO PREVENT AND CURE DIABETES	50,000
AMMONIA REFRIGERATION FOUNDATION 1001 NORTH FAIRFAX STREET ALEXANDRIA, VA 22314		PC	TO SUPPORT RESEARCH AND EDUCATIONAL EFFORTS IN INDUSTRIAL REFRIGERATION	100,000
ANIMAL RESCUE INC 2 HERITAGE FARM DRIVE NEW FREEDOM, PA 17349		PC	PROVIDE NECESSARY SERVICES TO ANIMALS	10,000
ARC OF CARROLL COUNTY INC 180 KRIDERS CHURCH ROAD WESTMINSTER, MD 21158		PC	TO SUPPORT PEOPLE WITH INTELLECTUAL AND DEVELOPMENTAL DISABILITIES	150,000
BALTIMORE SQUASHWISE INC 3600 CLIPPER MILL ROAD BALTIMORE, MD 21211		PC	ENRICH LIVES OF BALTIMORE CITY YOUTH THROUGH ATHLETICS AND ACADEMICS	25,000
BOYS & GIRLS CLUB OF WESTMINSTER INC 25 UNION STREET WESTMINSTER, MD 21157		PC	TO INSPIRE AND ENABLE ALL YOUNG PEOPLE	50,000
BRENDAN CORPORATION 1500 K STREET NW NO 350 WASHINGTON, DC 20005		PC	TO PROVIDE STUDENTS WITH A SAFE LEARNING ENVIRONMENT	10,000
CARROLL CHILD CARE CENTERS INC PO BOX 99 WESTMINSTER, MD 21158		PC	TO PROVIDE AFFORDABLE, CONVENIENT AND CREDENTIALED DAY CARE SERVICES AND PRESCHOOL EDUCATION	15,000
CARROLL COMMUNITY COLLEGE FOUNDATION INC 1601 WASHINGTON ROAD WESTMINSTER, MD 21157		PC	TO PROVIDE SUPPORT TO CARROLL COMMUNITY COLLEGE	50,000
CARROLL COUNTY PUBLIC SCHOOLS EDUCATION FOUNDATION INC 125 N COURT STREET WESTMINSTER, MD 21157		PC	EDUCATIONAL	50,000
CARROLL HOSPICE 292 STONER AVENUE WESTMINSTER, MD 21157		PC	IMPROVING THE QUALITY OF LIFE FOR PATIENTS NEEDING END-OF-LIFE CARE	50,000
CARROLL HOSPITAL CENTER 200 MEMORIAL AVENUE WESTMINSTER, MD 21157		PC	SOCIAL SERVICES	1,015,000
CARSON SCHOLARS FUND INC 305 WEST CHESAPEAKE AVENUE TOWSON, MD 21204		PC	SCHOLARSHIP FUND	25,000
CHARITYWATCH PO BOX 578460 CHICAGO, IL 60657		PC	CHARITY WATCHDOG - PROVIDE DONORS WITH INFORMATION TO MAKE MORE INFORMED GIVING DECISIONS	1,000
Total . . . . ▶ **3a**				3,313,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
COMMUNITY FOUNDATION OF CARROLL COUNTY 255 CLIFTON BLVD SUITE 313 WESTMINSTER, MD 21157		PC	MAINTAIN AND ENHANCE THE QUALITY OF LIFE IN THE COMMUNITY OF CARROLL COUNTY	15,000
DAYS END FARM HORSE RESCUE INC 1372 WOODBINE ROAD WOODBINE, MD 21797		PC	ANIMAL WELFARE	10,000
DIABETES ACTION RESEARCH AND EDUCATION FOUNDATION 426 C STREET NE WASHINGTON, DC 20002		PC	PREVENTION AND TREATMENT OF DIABETES	10,000
DOWNTOWN SAILING CENTER 1425 KEY HIGHWAY BALTIMORE, MD 21230		PC	EDUCATIONAL	10,000
FAMILY & CHILDREN'S SERVICES OF CENTRAL MD INC 4623 FALLS ROAD BALTIMORE, MD 21209		PC	PROVIDES SERVICES TO VULNERABLE FAMILIES & INDIVIDUALS	20,000
FISHER HOUSE FOUNDATION INC 111 ROCKVILLE PIKE ROCKVILLE, MD 20850		PC	FINANCIAL ASSISTANCE TO CURRENT MEMBERS OF UNITED STATES ARMED FORCES	75,000
FUND FOR JOHNS HOPKINS MEDICINE 750 EAST PRATT STREET 17TH FLOOR BALTIMORE, MD 21202		PC	TO SUPPORT MEDICAL RESEARCH, PATIENT CARE AND MEDICAL EDUCATION	50,000
GBMC HEALTHCARE INC 6701 NORTH CHARLES STREET BALTIMORE, MD 21204		PC	TO PROVIDE HEALTH RELATED SERVICES	200,000
HABITAT FOR HUMANITY OF CARROLL COUNTY INC 255 CLIFTON BLVD WESTMINSTER, MD 21157		PC	TO BRING PEOPLE TOGETHER TO BUILD HOMES, COMMUNITIES, AND HOPE	70,000
HAMPDEN FAMILY CENTER INC 1104 WEST 36TH STREET BALTIMORE, MD 21211		PC	SOCIAL SERVICES	25,000
HISTORIC ST MARY'S CITY FOUNDATION PO BOX 24 ST MARYS CITY, MD 20686		PC	HISTORY AND ARCHAEOLOGY	27,000
HOMES FOR OUR TROOPS 6 MAIN STREET TAUNTON, MA 02780		PC	BUILD HOMES FOR INJURED SOLDIERS	50,000
HOSPICE OF FREDERICK COUNTY 7000 KIMMEL ROAD MT AIRY, MD 21771		PC	SOCIAL SERVICES	150,000
HOWARD COMMUNITY COLLEGE EDUCATIONAL FOUNDATION INC 10901 LITTLE PATUXENT PARKWAY COLUMBIA, MD 21044		PC	TO RAISE FUNDS THAT SUPPORT STUDENTS, PROGRAMS, AND FACILITIES OF HOWARD COMMUNITY COLLEGE	50,000
HUMAN SERVICES PROGRAMS OF CARROLL COUNTY INC 10 DISTILLERY DRIVE WESTMINSTER, MD 21158		PC	TO IMPROVE THE QUALITY OF LIFE OF AT-RISK, LOW-INCOME CARROLL COUNTY RESIDENTS	50,000
Total . . . . ▶ **3a**				3,313,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
MAKE-A-WISH FOUNDATION OF THE MID-ATLANTIC INC 5272 RIVER ROAD NO 700 BETHESDA, MD 20816		PC	GRANT WISHES OF CHILDREN WITH LIFE-THREATENING MEDICAL CONDITIONS	40,000
MARINE TOYS FOR TOTS FOUNDATION 18251 QUANTICO GATEWAY DRIVE TRIANGLE, VA 22172		PC	TO COLLECT NEW TOYS DURING CHRISTMAS TIME AND DISTRIBUTE TO NEEDY CHILDREN IN THE COMMUNITY	25,000
MARYLAND FOOD BANK INC 2200 HALETHORPE FARMS ROAD SW BALTIMORE, MD 21227		PC	TO PROVIDE FOOD IN AN ATTEMPT TO END HUNGER	25,000
MARYLAND ZOOLOGICAL SOCIETY INC BALTIMORE ZOO DRUID HILL PARK BALTIMORE, MD 21217		PC	TO RESEARCH AND CARE FOR THE ANIMALS AND TO EDUCATE THE PUBLIC	25,000
MEALS ON WHEELS OF CENTRAL MARYLAND INC 515 S HAVEN STREET BALTIMORE, MD 21224		PC	TO ENHANCE THE QUALITY OF LIFE BY PROVIDING FOOD	25,000
MISSION OF MERCY INC 22 SOUTH MARKET STREET FREDERICK, MD 21701		PC	SOCIAL SERVICES	250,000
NATIONAL MARITIME HERITAGE FOUNDATION 236 MASSACHUSETTS AVENUE NE SUITE 410 WASHINGTON, DC 20002		PC	EDUCATIONAL	10,000
ORPHANAGE SUPPORT SERVICES ORGANIZATION PO BOX 345 REXBURG, ID 83440		PC	SOCIAL SERVICES	5,000
OUTWARD BOUND INC 100 MYSTERY POINT ROAD GARRISON, NY 10524		PC	EDUCATIONAL	100,000
RONALD MCDONALD HOUSE CHARITIES OF BALTIMORE INC 635 W LEXINGTON STREET BALTIMORE, MD 21201		PC	PROVIDES A HOME AWAY FROM HOME FOR SERIOUSLY ILL CHILDREN AND THEIR FAMILIES	150,000
SHRINERS' HOSPITAL FOR CHILDREN PO BOX 31356 TAMPA, FL 33631		PC	PEDIATRIC SPECIALTY CARE	50,000
SILVER OAK ACADEMY INC PO BOX 250 KEYMAR, MD 21757		PC	EDUCATION AND VOCATIONAL TRAINING FOR BOYS IN THE JUVENILE JUSTICE SYSTEM	25,000
TREE OF FRIENDS FOUNDATION 255 CLIFTON BLVD WESTMINSTER, MD 21157		PC	TO ADDRESS HUMANITARIAN NEEDS WITHIN THE CARROLL COUNTY COMMUNITY	5,000
TRIANGLE EDUCATION FOUNDATION 120 SOUTH CENTER STREET PLAINFIELD, IN 46168		PC	EDUCATIONAL	5,000
VESTRY OF ST DAVID'S 4700 ROLAND AVENUE BALTIMORE, MD 21210		PC	WORSHIP AND HELP PEOPLE EMBRACE THE COMPLEXITY OF MODERN LIFE	20,000
Total . . . . ▶ **3a**				3,313,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
WOUNDED WARRIOR PROJECT INC 4899 BELFORT ROAD NO 300 JACKSONVILLE, FL 32256		PC	TO HONOR AND EMPOWER WOUNDED WARRIORS	50,000
ZERO - THE END OF PROSTATE CANCER 515 KING STREET ALEXANDRIA, VA 22314		PC	TO END PROSTATE CANCER	5,000
Total . . . . ▶ **3a**				3,313,000

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

Schedule of Contributors

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

OMB No 1545-0047

2013

Name of the organization	**Employer identification number**
THE KAHLERT FOUNDATION INC	52-1798711

Organization type (check one)

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☑ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

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

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc , purposes, but these contributions did not total more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions of $5,000 or more during the year . . . . ▶ $ ____________

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

Name of organization
THE KAHLERT FOUNDATION INC

Employer identification number
52-1798711

Part I **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	WILLIAM E KAHLERT REVOCABLE TRUST 409 WASHINGTON AVENUE STE 900 TOWSON, MD 21204	$ 79,459,367	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization
THE KAHLERT FOUNDATION INC

Employer identification number
52-1798711

Part II **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

Name of organization
THE KAHLERT FOUNDATION INC

Employer identification number
52-1798711

Part III ***Exclusively*** **religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than $1,000 for the year.** Complete columns **(a)** through **(e) and** the following line entry
For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **$1,000 or less** for the year (Enter this information once See instructions) ▶ $
Use duplicate copies of Part III if additional space is needed

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

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

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

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

TY 2013 Accounting Fees Schedule

Name: THE KAHLERT FOUNDATION INC

EIN: 52-1798711

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	15,850	15,850		0

TY 2013 Investments Corporate Bonds Schedule

Name: THE KAHLERT FOUNDATION INC

EIN: 52-1798711

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS	5,160,565	5,112,876

TY 2013 Investments Corporate Stock Schedule

Name: THE KAHLERT FOUNDATION INC

EIN: 52-1798711

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK	74,986,665	169,269,985
MUTUAL FUNDS	12,871,619	14,999,168

TY 2013 Other Expenses Schedule

Name: THE KAHLERT FOUNDATION INC

EIN: 52-1798711

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DUES AND SUBSCRIPTIONS	725	725		0
MISCELLANEOUS	122	122		0
OFFICE EXPENSE	210	210		0

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TY 2013 Other Income Schedule

Name: THE KAHLERT FOUNDATION INC

EIN: 52-1798711

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER	78	78	78

TY 2013 Other Professional Fees Schedule

Name: THE KAHLERT FOUNDATION INC

EIN: 52-1798711

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISORY FEES	70,193	70,193		0
CUSTODY FEES	3,141	3,141		0
BANK SERVICE CHARGES	35	35		0

TY 2013 Substantial Contributors Schedule

Name: THE KAHLERT FOUNDATION INC

EIN: 52-1798711

Name	Address
WILLIAM E KAHLERT REVOCABLE TRUST	

TY 2013 Taxes Schedule

Name: THE KAHLERT FOUNDATION INC

EIN: 52-1798711

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX ON INVESTMENT INCOME FOR FYE 06/30/13	2,569	0		0
FOREIGN TAXES WITHHELD ON INVESTMENTS	834	834		0