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Form 990-PF

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

2014

Open to Public Inspection

Department of the Treasury Internal Revenue Service

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For calendar year 2014, or tax year beginning 01-01-2014, and ending 12-31-2014

Name of foundation: JOCHUM CHARITABLE FOUNDATION INC. A Employer identification number: 34-1951170. B Telephone number: (216) 642-3342. G Check all that apply: Initial return, Final return, Address change. H Check type of organization: Section 501(c)(3) exempt private foundation. I Fair market value of all assets at end of year: \$3,791,799. J Accounting method: Cash.

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (1-12) and Operating and Administrative Expenses (13-26), leading to Total expenses and disbursements of 150,322 and Excess of revenue over expenses of 124,417.

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

Part II Balance Sheets		Beginning of year			End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	71,782	137,815	137,815		
	2	Savings and temporary cash investments					
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	5	Grants receivable					
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)					
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____					
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges					
	10a	Investments—U S and state government obligations (attach schedule)	78,323	49,318	53,409		
	b	Investments—corporate stock (attach schedule)	2,439,214	2,565,700	3,493,115		
	c	Investments—corporate bonds (attach schedule)	138,492	99,397	107,460		
	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)	2,727,811	2,852,230	3,791,799			
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				
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.						
	24	Unrestricted	2,727,811	2,852,230			
	25	Temporarily restricted					
	26	Permanently restricted					
	Foundations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 27 through 31.						
	27	Capital stock, trust principal, or current funds					
	28	Paid-in or capital surplus, or land, bldg, and equipment fund					
	29	Retained earnings, accumulated income, endowment, or other funds					
30	Total net assets or fund balances (see instructions)	2,727,811	2,852,230				
31	Total liabilities and net assets/fund balances (see instructions)	2,727,811	2,852,230				

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	2,727,811
2	Enter amount from Part I, line 27a	2	124,417
3	Other increases not included in line 2 (itemize) ▶ _____	3	2
4	Add lines 1, 2, and 3	4	2,852,230
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,852,230

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 - ST			
b	PUBLICLY TRADED SECURITIES - LT			
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	949,288		844,086	105,202
b	666,165		525,295	140,870
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			105,202
b			140,870
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	246,072
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 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))
2013	116,355	3,116,067	0.03734
2012	83,848	2,380,674	0.03522
2011	71,857	1,664,895	0.04316
2010	71,484	1,508,951	0.047373
2009	74,405	1,266,286	0.058758

2	Total of line 1, column (d).	2	0.221851
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	0.04437
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	3,649,852
5	Multiply line 4 by line 3.	5	161,944
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	2,822
7	Add lines 5 and 6.	7	164,766
8	Enter qualifying distributions from Part XII, line 4.	8	150,322

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 <input type="checkbox"/> 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 <input type="checkbox"/> and enter 1% of Part I, line 27b	1	5,645
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	
3	Add lines 1 and 2.	3	5,645
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	5	5,645
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	4,906
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	7,000
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments Add lines 6a through 6d.	7	11,906
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	6,261
11	Enter the amount of line 10 to be Credited to 2015 estimated tax 6,261 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? <input type="checkbox"/>	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>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.</i>	1b	No
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 <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	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? <i>If "Yes," attach a conformed copy of the changes</i> <input type="checkbox"/>	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? <i>If "Yes," attach the statement required by General Instruction T.</i> <input type="checkbox"/>	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? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> OH _____		
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? <i>If "No," attach explanation .</i>	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 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of DAVID J HESSLER Telephone no (216) 642-3342 Located at 6055 ROCKSIDE WOODS BLVD SUITE 200 CLEVELAND OH ZIP+4 441312301			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year 15			
16	At any time during calendar year 2014, 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 instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country	16	Yes	No

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			
1b	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)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1b		
1c	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 2014?	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 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2014 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.</i>)	3b		
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 2014?	4b		No

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

<p>5a During the year did the foundation pay or incur any amount to</p> <p>(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/></p> <p>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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," attach the statement required by Regulations section 53.4945–5(d).</p> <p>6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes" to 6b, file Form 8870.</p> <p>7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>	5b		
	6b		No
	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
EMMA E JOCHUM 20932 AVALON DRIVE ROCKY RIVER, OH 44116	TTEE/PRES 0	0	0	0
DAVID J HESSLER 6055 ROCKSIDE WOODS BLVD 200 CLEVELAND, OH 441312301	SEC/TREAS/TTEE 0	0	0	0
DAVID BUEGLER 4321 JAYCOX ROAD AVON, OH 44011	TTEE 0	0	0	0

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Total number of other employees paid over \$50,000. <input type="checkbox"/>				

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

Total number of others receiving over \$50,000 for professional services. ▶

Part IX-A Summary of Direct Charitable Activities

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

All other program-related investments. See instructions.	
3 _____	

Total. Add lines 1 through 3 ▶

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	3,589,521
b	Average of monthly cash balances.	1b	113,616
c	Fair market value of all other assets (see instructions).	1c	2,296
d	Total (add lines 1a, b, and c).	1d	3,705,433
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	3,705,433
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	55,581
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,649,852
6	Minimum investment return. Enter 5% of line 5.	6	182,493

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	182,493
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	5,645
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	5,645
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	176,848
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	176,848
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	176,848

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	150,322
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	150,322
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	150,322

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 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				176,848
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			133,053	
b Total for prior years 2012, 2011, 2010				
3 Excess distributions carryover, if any, to 2014				
a From 2009.				
b From 2010.				
c From 2011.				
d From 2012.				
e From 2013.				0
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ <u>150,322</u>				
a Applied to 2013, but not more than line 2a			133,053	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2014 distributable amount.				17,269
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2014 <i>(If an amount appears in column (d), the same amount must be shown in column (a).)</i>	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions.				
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions.				
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				159,579
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a.	0			
10 Analysis of line 9				
a Excess from 2010.				
b Excess from 2011.				
c Excess from 2012.				
d Excess from 2013.				
e Excess from 2014.	0			

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 2014, 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) 2014	(b) 2013	(c) 2012	(d) 2011	
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))

EMMA E JOCHUM

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

NONE

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

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

a The name, address, and telephone number or email address 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	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> SALVATION ARMY OF GREATER CLEVELAND 2507 E 22ND STREET CLEVELAND, OH 44115		PC	GENERAL, NON	100,000
THE CITY MISSION 5310 CARNEGIE AVENUE CLEVELAND, OH 44103		PC	GENERAL, NON	10,000
LUTHERAN HOME 2116 DOVER CENTER RD WESTLAKE, OH 44145		PC	GENERAL, NON	10,000
GUIDESTONE 3500 CARNEGIE AVE CLEVELAND, OH 44115		PC	GENERAL, NON	13,500
Total 3a				133,500
b <i>Approved for future payment</i>				
Total 3b				

Form 8949

Sales and Other Dispositions of Capital Assets

2014

Department of the Treasury Internal Revenue Service

Information about Form 8949 and its separate instructions is at www.irs.gov/form8949. File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D.

Attachment Sequence No 12A

Name(s) shown on return

Social security number or taxpayer identification number

34-1951170

Before you check Box A, B, or C below, check whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either may show your basis (usually your cost) even if your broker did not report it to the IRS. Brokers must report basis to the IRS for most stock you bought in 2011 or later (and for certain debt instruments you bought in 2014 or later).

Part I Short-Term. Transactions involving capital assets you held 1 year or less are short term. For long-term transactions, see page 2.

Note. You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which NO adjustments or codes are required. Enter the total directly on Schedule D, line 1a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box A, B, or C below. Check only one box. If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

- (A) Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above)
(B) Short-term transactions reported on Form(s) 1099-B showing basis was not reported to the IRS
(C) Short-term transactions not reported to you on Form 1099-B

Table with 7 columns: (a) Description of property, (b) Date acquired, (c) Date sold or disposed, (d) Proceeds, (e) Cost or other basis, (f) Code(s) from instructions, (g) Amount of adjustment, (h) Gain or (loss). Includes a '2 Totals' row at the bottom.

Note. If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

Name(s) shown on return Name and SSN or taxpayer identification no. not required if shown on other side
 JOCHUM CHARITABLE FOUNDATION INC
 C/O DAVID J HESSLER

Social security number or taxpayer identification number
 34-1951170

Before you check Box D, E, or F below, check whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either may show your basis (usually your cost) even if your broker did not report it to the IRS. Brokers must report basis to the IRS for most stock you bought in 2011 or later (and for certain debt instruments you bought in 2014 or later).

Part II Long-Term. Transactions involving capital assets you held more than 1 year are long term. For short-term transactions, see page 1.

Note. You may aggregate all long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which NO adjustments or codes are required. Enter the total directly on Schedule D, line 8a; you are not required to report these transactions on Form 8949 (see instructions).

You must check Box D, E, or F below. Check only one box. If more than one box applies for your long-term transactions, complete a separate Form 8949, page 2, for each applicable box. If you have more long-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need.

(D) Long-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see **Note** above)

(E) Long-term transactions reported on Form(s) 1099-B showing basis was **not** reported to the IRS

(F) Long-term transactions not reported to you on Form 1099-B

1	(a) Description of property (Example 100 sh XYZ Co)	(b) Date acquired (Mo , day, yr)	(c) Date sold or disposed (Mo , day, yr)	(d) Proceeds (sales price) (see instructions)	(e) Cost or other basis See the Note below and see <i>Column (e)</i> in the separate instructions	Adjustment, if any, to gain or loss If you enter an amount in column (g), enter a code in column (f) See the separate instructions		(h) Gain or (loss). Subtract column (e) from column (d) and combine the result with column (g)
						(f) Code(s) from instructions	(g) Amount of adjustment	
	PUBLICLY TRA			666,165	(525,295)			140,870
2 Totals	Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts) Enter each total here and include on your Schedule D, line 8b (if Box D above is checked), line 9 (if Box E above is checked), or line 10 (if Box F above is checked) ▶			666,165	(525,295)			140,870

Note. If you checked Box D above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an adjustment in column (g) to correct the basis. See *Column (g)* in the separate instructions for how to figure the amount of the adjustment.

TY 2014 Accounting Fees Schedule

Name: JOCHUM CHARITABLE FOUNDATION INC

C/O DAVID J HESSLER

EIN: 34-1951170

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PRICEWATERHOUSECOOPERS LLP	11,850			11,850

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2014 Depreciation Schedule

Name: JOCHUM CHARITABLE FOUNDATION INC

C/O DAVID J HESSLER

EIN: 34-1951170

TY 2014 Legal Fees Schedule

Name: JOCHUM CHARITABLE FOUNDATION INC

C/O DAVID J HESSLER

EIN: 34-1951170

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
WEGMAN, HESSLER & VANDERBURG	3,596			3,596

TY 2014 Other Expenses Schedule

Name: JOCHUM CHARITABLE FOUNDATION INC
 C/O DAVID J HESSLER

EIN: 34-1951170

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE OF OHIO FILING FEE	200			200
D & O LIABILITY INSURANCE	1,176			1,176

TY 2014 Other Increases Schedule

Name: JOCHUM CHARITABLE FOUNDATION INC
 C/O DAVID J HESSLER
EIN: 34-1951170

Description	Amount
MISC ADJUSTMENT	2

TY 2014 Other Professional Fees Schedule

Name: JOCHUM CHARITABLE FOUNDATION INC

C/O DAVID J HESSLER

EIN: 34-1951170

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT & ADVISORY SERVICES	34,359	34,359		
ADR FEES	2	2		

TY 2014 Taxes Schedule

Name: JOCHUM CHARITABLE FOUNDATION INC
 C/O DAVID J HESSLER

EIN: 34-1951170

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID	475	475		
2013 FED PAYMENT MADE IN 2014	7,500			

THE JOCHUM CHARITABLE FOUNDATION
34-1951170
12/31/2014

FORM 990PF, PART II, BALANCE SHEET LINE 10a (U S AND STATE GOVERNMENT OBLIGATIONS)

QUANTITY	DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	FMV
4,000	FEDERAL HOME LOAN MTG CORP MEDIUM 1/30/2004 5 00%	3,892	-	-
4,000	FEDERAL HOME LOAN MTG CORP MEDIUM 1/30/2004 5 00%	3,957	-	-
2,000	FEDERAL HOME LOAN MTG CORP MEDIUM 1/30/2004 5 00%	1,986	-	-
2,000	FEDERAL HOME LOAN MTG CORP MEDIUM 1/30/2004 5 00%	1,995	-	-
13,000	FEDERAL HOME LOAN MTG CORP MEDIUM 1/30/2004 5 00%	12,944	-	-
2,000	FEDERAL HOME LOAN MTG CORP MEDIUM 1/30/2004 5 00%	2,003	-	-
2,000	FEDERAL HOME LOAN MTG CORP MEDIUM 1/30/2004 5 00%	2,004	-	-
7,000	US TREASURY NOTES SER E-2016 DTD 8/15/2006 4 875%	7,173	7,108	7,491
8,000	US TREASURY NOTES SER E-2016 DTD 8/15/2006 4 875%	8,162	8,101	8,561
3,000	US TREASURY NOTES SER E-2016 DTD 8/15/2006 4 875%	3,116	3,072	3,210
1,000	US TREASURY NOTES SER E-2016 DTD 8/15/2006 4 875%	1,050	1,031	1,070
8,000	FEDERAL NATL MTG ASSN GLOBAL DEBS DTD 8/17/2006 5 25%	8,059	8,038	8,622
10,000	FEDERAL NATL MTG ASSN GLOBAL DEBS DTD 8/17/2006 5 25%	10,041	10,026	10,777
12,000	US TREASURY NOTES DTD 11/15/2009 3 375%	11,941	11,941	13,000
	ACCRUED INTEREST - GOV'T OBLIGATIONS			677
	TOTAL GOVERNMENT BONDS	78,323	49,318	53,409

THE JOCHUM CHARITABLE FOUNDATION
34-1951170
12/31/2014

FORM 990PF, PART II, BALANCE SHEET LINE 10b (INVESTMENTS - CORPORATE STOCK)

	December 31, 2014			December 31, 2013	
	Number of Shares	Cost or Fair Value at Date of Contribution or Purchase	Fair Value	Number of Shares	Cost or Fair Value at Date of Contribution or Purchase
Common Stocks					
ACTAVIS PLC	207	29,808	53,284	512	68,236
AGRIUM INC (CANADA) CAD				620	51,675
AMERICAN TOWER CORP REIT				780	60,836
APPLE INC	910	50,095	100,446	130	50,095
AUTODESK INC				1,200	41,416
BP PLC	1,365	54,752	52,034	1,200	48,293
CARDINAL HEALTH INC	775	31,800	62,566	950	39,272
CATAMARAN CORP	1,575	70,779	81,506	-	-
CELGENE CORP	900	67,270	100,674	-	-
CHEVRON CORP				275	27,812
CISCO SYSTEMS INC				2,980	61,547
CLOUD PEAK ENERGY INC	3,375	38,174	30,983		
COCA COLA CO COM				1,495	59,202
COMMUNITY HEALTH SYSTEMS INC	825	33,875	44,484	1,350	55,411
CVS CAREMARK CORP	925	41,817	89,087	875	38,520
DICKS SPORTING GOODS INC	1,645	78,432	81,674	1,100	53,023
DU PONT DE NEMOURS				1,000	53,126
EMC CORP MASS				1,100	25,768
EXPRESS SCRIPTS INC	982	55,353	83,146	932	51,938
FIFTH THIRD BANCORP	3,655	56,661	74,471	3,105	45,142
FORD MOTOR CO COM NEW	4,680	58,461	72,540	3,580	42,295
FREEMPORT MCMORAN COPPER & GOLD CL B				400	7,850
GENERAL MOTORS CO	2,095	75,600	73,136		
GENL ELECTRIC CO	3,030	67,057	76,568	2,330	49,076
GENWORTH FINANCIAL INC CL A	6,625	57,193	56,313		
GILEAD SCIENCES INC	950	68,732	89,547	-	-
GOOGLE INC CLASS A	64	21,298	33,962	44	19,730
GOOGLE INC CLASS C	54	15,622	28,426		
HALLIBURTON CO	1,125	32,528	44,246	1,125	32,528
HARTFORD FINCL SERVICES GROUP INC	1,370	30,727	57,115	1,370	30,727
INSMED INC COM	2,035	28,253	31,481		
INTEL CORP				1,600	31,090
INTL BUSINESS MACH				335	65,833
INTL PAPER CO	1,275	55,020	68,315	1,275	55,810
JP MORGAN CHASE & CO	1,080	37,334	67,586	1,080	37,334
KEYCORP NEW	5,175	45,340	71,933	4,550	37,134
LORILLARD INC				950	37,554
MCDONALDS CORP	595	54,262	55,752	545	49,729
MCKESSON CORP	350	27,148	72,653	400	31,582
MERCK & CO INC NEW COM				1,200	46,858
METLIFE INC				1,040	37,916
MICROSOFT CORP	1,345	34,132	62,475	1,545	39,980
MONSANTO CO NEW	650	73,899	77,656		
MONSTER BEVERAGE CORP COM				310	15,124
MORGAN STANLEY	2,250	67,080	87,300		
MYLAN INC	1,555	38,507	87,655	1,455	28,739
NORDSTROM INC	675	36,501	53,588	850	45,667
NOVARTIS AG SPON ADR				275	21,612
ORACLE CORP				1,015	26,327
PERRIGO CO PLC EUR	475	68,294	79,401		
PFIZER INC	2,040	49,741	63,546	1,790	42,337
PRECISION CASTPARTS CORP	235	54,760	56,607		
PULTE GROUP INC	3,430	55,397	73,608	3,130	49,779
QUALCOMM INC	700	38,840	52,031	750	40,764
SCHLUMBERGER LTD NETHERLANDS ANTILLES	800	61,895	68,328	575	41,553
TERADYNE INC				1,000	16,540
UNILEVER PLC AMER SHS NEW SPON ADR				1,355	52,789
UNTD TECHNOLOGIES CORP	490	38,668	56,350	360	25,134
US BANCORP DEL	1,715	57,872	77,089	1,490	48,620
VALEANT PHARMACEUTICALS INTL	525	64,191	75,133		
VERIZON COMMUNICATIONS INC	1,365	64,151	63,855	-	-

VMWARE INC CL A				555	38,203
WALGREEN BOOTS ALLIANCE INC	1,000	42,093	76,200		
WALGREEN CO				760	25,404
Closed end funds & Exchange traded products					
ISHARES CORE MSCI EMERGING MARKETS ETF	575	25,713	27,042	575	25,713
VANGUARD INDEX FUNDS SMALL CAP ETF	650	48,945	75,829	650	48,945
VANGUARD INDEX FUNDS SMALL CAP GRWTH ETF VIPERS	625	53,310	78,713	625	53,310
VANGUARD INDEX FUNDS SMALL CAP VALUE ETF	750	53,477	79,328	750	53,477
VANGUARD INDEX FUNDS MID CAP ETF	1,155	89,705	142,712	1,155	89,705
VANGUARD INDEX FUNDS MID-CAP GROWTH	525	35,459	53,345	525	35,459
VANGUARD INDEX FUNDS MID-CAP VALUE	925	52,184	82,723	925	52,184
VANGUARD MSCI EUROPEAN ETF	1,230	51,214	64,464	1,230	51,214
VANGUARD MSCI EMERGING MARKETS ETF	605	26,282	24,212	605	26,282
TOTAL MARKETABLE SECURITIES		<u>2,565,700</u>	<u>3,493,115</u>		<u>2,439,214</u>

THE JOCHUM CHARITABLE FOUNDATION
34-1951170
12/31/2014

FORM 990PF, PART II, BALANCE SHEET LINE 10c (CORPORATE BONDS)

QUANTITY	DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	FMV
8.000	GOLDMAN SACHS GROUP INC DTD 04/01/2008 6 150%	8,407	8,318	8,979
7.000	AMERICAN EXPRESS CO DTD 05/18/2009 7 25%	7,017	-	-
9.000	JP MORGAN CHASE & CO DTD 05/18/2009 4 650%	8,973	-	-
2.000	JP MORGAN CHASE & CO DTD 05/18/2009 4 650%	2,010	-	-
5.000	WACHOVIA CORP SUB NOTES DTD 7/22/2004 5 25%	4,888	-	-
2.000	WACHOVIA CORP SUB NOTES DTD 7/22/2004 5 25%	1,970	-	-
3.000	WACHOVIA CORP SUB NOTES DTD 7/22/2004 5 25%	2,961	-	-
1.000	WACHOVIA CORP SUB NOTES DTD 7/22/2004 5 25%	993	-	-
8.000	GENERAL ELECTRIC CAPITAL CORP DTD 3/4/2005 4 875%	8,000	8,000	8,059
5.000	GENERAL ELECTRIC CAPITAL CORP DTD 3/4/2005 4 875%	4,849	4,849	5,037
9.000	COMCAST CORP DTD 3/2/2006 5 90%	9,062	9,035	9,542
9.000	TIME WARNER CABLE INC DTD 04/09/2007 5 85%	8,934	8,934	9,824
2.000	TIME WARNER CABLE INC DTD 04/09/2007 5 85%	2,059	2,042	2,183
9.000	XTO ENERGY INC DTD 7/19/2007 6 25%	9,087	9,064	10,122
6.000	AT&T INC DTD 02/01/2008 5 5%	6,074	6,057	6,623
2.000	AT&T INC DTD 02/01/2008 5 5%	2,055	2,043	2,208
9.000	CISCO SYSTEMS INC DTD 02/17/2009 4 950%	9,013	9,011	10,059
2.000	CISCO SYSTEMS INC DTD 02/17/2009 4 950%	2,054	2,044	2,235
30.000	BARCLAYS BANK PLC NTS DTD 09/19/2011 4 00%	30,000	30,000	31,043
8.000	RIO TINTO FINANCE PLCP DTD 04/17/2009 8 95%	8,054	-	-
2.000	RIO TINTO FINANCE PLCP DTD 04/17/2009 8 95%	2,033	-	-
	ACCRUED INTEREST - CORPORATE BONDS			1,546
	TOTAL CORPORATE BONDS	138,492	99,397	107,460