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Form 990-PF

Return of Private Foundation

OMB No 1545-0052

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

2014

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Department of the Treasury Internal Revenue Service

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

Open to Public Inspection

311

For calendar year 2014 or tax year beginning 2014, and ending 20

Name of foundation: OLSON-KULKA FOUNDATION. Employer identification number: 38-6074650. Telephone number: 248-996-9499. City: SOUTHFIELD MI 48075. Accounting method: Cash. Fair market value: \$710,048.

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 (13-27).

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	27,236.	41,955.	41,955.
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less allowance for doubtful accts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accts ▶			
	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 gov't obligations (attach schedule)			
	b Investments - corporate stock (attach schedule)	105,557.	100,399.	100,399.
	c Investments - corporate bonds (attach schedule)			
	11 Investments - land, buildings, and equipment basis (attach schedule) ▶			
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other (attach schedule)	567,275.	567,694.	567,694.	
14 Land, buildings, and equipment basis (attach schedule) ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶ )				
16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item i)	700,068.	710,048.	710,048.	
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)				
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, ck. here ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31			
	27 Capital stock, trust principal, or current funds	695,139.	709,119.	
28 Paid-in or capital surplus or land, bldg and equipment fund				
29 Retained earnings, accumulated income, endowment, or other funds	4,929.	929.		
30 Total net assets or fund balances (see instructions)	700,068.	710,048.		
31 Total liabilities and net assets/fund balances (see instructions)	700,068.	710,048.		

**Part III Analysis of Changes in Net Assets or Fund Balances**

1 Total net assets or fund balances - beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	700,068.
2 Enter amount from Part I, line 27a	2	11,839.
3 Other increases not included in line 2 (itemize) ▶ UNREALIZED GAIN	3	13,980.
4 Add lines 1, 2, and 3	4	725,887.
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	725,887.

**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	LORD ABBETT INFLATION FOCUSED FD CL A	P	11/28/2014	12/16/2014
b	LORD ABBETT FLOATING RATE FD CL A	P	11/28/2014	12/16/2014
c	309 LORD ABBETT INFLATION FOCUSED FD CL A	P	03/13/2013	12/16/2014
d	440 LORD ABBETT FLOATING RATE FD CL A	P	03/13/2013	12/16/2014
e	SEE ATTACHED WORKSHEET			
(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 2.		2.		
b 5.		5.		
c 3,998.	12.	4,607.	(597.)	
d 3,995.	4.	4,189.	(190.)	
e 96,324.		79,698.	16,626.	
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				
b				
c			(597.)	
d			(190.)	
e			16,626.	
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	15,839.
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	1,671.

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No

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

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

(a) Base period years Calendar year (or tax year beginning)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2013			
2012			
2011			
2010			
2009			

2	Total of line 1, column (d)	2	
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	
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	
5	Multiply line 4 by line 3	5	
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	
7	Add lines 5 and 6	7	
8	Enter qualifying distributions from Part XII, line 4 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	8	

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary - see instr.)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	288.
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	288.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0-	5	288.
6	Credits/Payments		
a	2014 estimated tax payments and 2013 overpayment credited to 2014	6a	
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	
8	Enter any <b>penalty</b> for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9	288.
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10	
11	Enter the amount of line 10 to be <b>Credited to 2015 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/>	11	

**Part VII-A Statements Regarding Activities**

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a		X
4b		X
5		X
6		X
7	X	
8a		
8b	X	
9		X
10		X

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)			X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)			X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶			X
14	The books are in care of ▶ <u>BARRY R BESS</u> Telephone no ▶ <u>248-996-9499</u> Located at ▶ <u>4000 TOWN CENTE SOUTHFIELD MI</u> ZIP+4 ▶ <u>48075-</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ▶	15		
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, (formerly TD F 90-22 1) If "Yes," enter the name of the foreign country ▶	16	Yes	No X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>	1b	
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 2014?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation, defined in section 170(e)(5)(D)(iii)(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 the 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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2014.)	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2014?	4b	X

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?  Yes  No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?  Yes  No

(3) Provide a grant to an individual for travel, study, or other similar purposes?  Yes  No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (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)? Organizations relying on a current notice regarding disaster assistance check here  **5b**

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?  Yes  No  
If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  Yes  No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?  Yes  No **6b** X  
If "Yes" to 6b, file Form 887C.

7a At any time during the tax year was the foundation a party to a prohibited tax shelter transaction?  Yes  No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?  Yes  No **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 comp	(e) Expense account, other allowances
ROBERT KULKA 8121 S JACKSON	PRESIDENT 10	0		
TERRENCE B KULKA 2042 ALTON STREET	VICE PRES 10	0		
BARRY R BESS 4000 TOWN CENTER STE 1240 Southfield, Mich 48075	SEC/TREAS 10	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
NONE				

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

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

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

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical info 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	
3 All other program-related investments. See instructions	
<b>Total.</b> 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	689,513.
b	Average of monthly cash balances	1b	23,569.
c	Fair market value of all other assets (see instructions)	1c	
d	<b>Total</b> (add lines 1a, b, and c)	1d	713,082.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	713,082.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	10,696.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	702,386.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	35,119.

**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	35,119.
2a	Tax on investment income for 2014 from Part VI, line 5	2a	288.
b	Income tax for 2014 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	288.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	34,831.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	34,831.
6	Deduction from distributable amount (see instructions)	6	
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	34,831.

**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	16,925.
b	Program-related investments-total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	16,925.
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	288.
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	16,637.

**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				34,831.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only				
b Total for prior years 20___, 20___, 20___				
3 Excess distributions carryover, if any, to 2014				
a From 2009				
b From 2010				
c From 2011				
d From 2012				
e From 2013				
f Total of lines 3a through e				
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 16,925.				
a Applied to 2013, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2014 distributable amount				16,925.
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, & 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount - see instructions				
e Undistributed income for 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				17,906.
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 2005 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a				
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				

**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 foundation is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

	Tax year				(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 foundation had \$5,000 or more in assets at any time during the year - see instructions.)

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

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 or e-mail 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 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
<b>a Paid during the year</b>				
TED LINDSAY FDN 1819 E BIG BEAVER 200 48083 MI TROY			GENERAL FUND	2,900.
WISH UPON A TEEN 261 E MAPLE ROAD 48009 MI BIRMINGHAM			GENERAL FUND	200.
CHARLES H WRIGHT MUSEUM 315 WARREN AVENUE 48201 MI DETROIT			GENERAL FUND	700.
DETROIT PUBLIC TV 1 CLOVER CT 48393 MI WIXOM			GENERAL FUND	500.
MID SOUTH AFRICA LINK 2810 HAMPTON COURT ROAD 38016 TN CORDOVA			GENERAL FUND	500.
OLD NEWSBOYS GOODFELLOW PO BOX 44444 48244 MI DETROIT			GENERAL FUND	3,000.
OHR SOMAYACH INTERNAT'L 1399 CONEY ISLAND AVE 11230 NY BROOKLYN			GENERAL FUND	1,800.
INTERLOCHEN CENTER APTS 4000 HIGHWAY M-137 49643 MI INTERLOCHEN			GENERAL FUND	250.
<b>Total</b>				<b>▶ 3a</b> 9,850.
<b>b Approved for future payment</b>				
<b>Total</b>				<b>▶ 3b</b> 7,075.





# Schedule of Contributors

**2014**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.

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

Name of the organization  
**OLSON-KULKA FOUNDATION**

Employer identification number  
**38-6074650**

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, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

### Special Rules

For an organization described in section 501(c)(3) 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), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions 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 an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *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 an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled 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 totaling \$5,000 or more during the year. ▶ \$ \_\_\_\_\_

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





**US 990PF**

**Capital Gains and Losses for Tax on Investment Income**

**2014**

Name: OLSON-KULKA FOUNDATION

ID number: 38-6074650

Ref	(a) List and describe the kind(s) of property sold	(b) How acquired purchase donation	(c) Date acquired	(d) Date sold
e	893 LORD ABBETT SHORT DURATION INC FD C	P	06/06/2012	12/16/2014
f	1394 LORD ABBETT INC FD A	P	01/16/2013	12/16/2014
g	68 AMERICAN CAP INC BLDR FD SBI CL A	P	07/09/2003	12/16/2014
h	3 AMAZON COM INC COM	P	04/07/2014	12/16/2014
i	60 ANTERO RES CORP	P	10/11/2013	10/08/2014
j	3 COMCAST CRP NEW CL A SPL	P	10/23/2014	11/12/2014
k	3 COOPER COS INC COM NEW	P	09/30/2014	11/12/2014
l	3 CHENIERE ENERGY	P	10/28/2014	11/12/2014
m	11 DELPHI AUTOMOTIVE PLC	P	01/17/2014	11/12/2014
n	16 EBAY INC	P	10/18/2013	09/30/2014

Ref	(e) Gross sales price	(f) Depreciation allowed or (allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss)
e	4,000.		4,107.	(107.)
f	4,000.		4,195.	(195.)
g	4,000.		2,958.	1,042.
h	900.		966.	(66.)
i	2,970.		3,282.	(312.)
j	160.		159.	1.
k	479.		468.	11.
l	217.		219.	(2.)
m	775.		689.	86.
n	900.		837.	63.
<b>Total</b>				<b>521.</b>

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/1969

Ref	(i) FMV as of 12/31/1969	(j) Adjusted basis as of 12/31/1969	(k) Excess of col (i) over col (j), if any	(l) Gains or losses
e				(107.)
f				(195.)
g				1,042.
h				(66.)
i				(312.)
j				1.
k				11.
l				(2.)
m				86.
n				63.
<b>Total</b>				<b>521.</b>
<b>Total short term capital gains or (losses)</b>				<b>(219.)</b>

**US 990PF**

**Capital Gains and Losses for Tax on Investment Income**

**2014**

Name: OLSON-KULKA FOUNDATION

ID number: 38-6074650

Ref	(a) List and describe the kind(s) of property sold	(b) How acquired purchase donation	(c) Date acquired	(d) Date sold
o	126 GENERAL MOTORS CO COMMO N SHARES	P	11/13/2013	09/08/2014
p	52 HUNT J B TRANS SVCS INC	P	10/11/2013	07/23/2014
q	15 IHS INC	P	08/13/2013	07/03/2014
r	26 INVESCO LTD	P	12/03/2013	11/12/2014
s	103 JP MORGAN CHASE & CO	P	10/07/2013	05/06/2014
t	25 KANSAS CITY SOUTHERN	P	02/25/2014	10/29/2014
u	13 MONSANOT CO NEW DEL COM	P	08/08/2013	04/03/2014
v	10 PIONEER NATURAL RES CO	P	01/30/2014	12/03/2014
w	16 TRIBUNE PUBLISHING CO SHS	P	01/06/2014	08/14/2014
x	7 UNITED RENTALS INC COM	P	03/10/2014	11/12/2014

Ref	(e) Gross sales price	(f) Depreciation allowed or (allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss)
o	4,227.		4,771.	(544.)
p	4,091.		3,755.	336.
q	2,052.		1,610.	442.
r	1,063.		906.	157.
s	5,644.		5,459.	185.
t	3,008.		2,343.	665.
u	1,522.		1,254.	268.
v	1,520.		1,713.	(193.)
w	314.		309.	5.
x	795.		644.	151.
<b>Total</b>				<b>1,472.</b>

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/1969

Ref	(i) FMV as of 12/31/1969	(j) Adjusted basis as of 12/31/1969	(k) Excess of col (i) over col (j), if any	(l) Gains or losses
o				(544.)
p				336.
q				442.
r				157.
s				185.
t				665.
u				268.
v				(193.)
w				5.
x				151.
<b>Total</b>				<b>1,472.</b>
<b>Total short term capital gains or (losses)</b>				<b>1,472.</b>

**US 990PF**

**Capital Gains and Losses for Tax on Investment Income**

**2014**

Name: OLSON-KULKA FOUNDATION

ID number: 38-6074650

Ref	(a) List and describe the kind(s) of property sold	(b) How acquired purchase donation	(c) Date acquired	(d) Date sold
y	5 UNION PACIFIC CORP	P	06/25/2013	05/19/2014
z	5 VISA INC CL A SHRS	P	05/06/2014	11/12/2014
aa	13 AMAZON COM INC COM	P	10/26/2012	12/16/2014
bb	15 AMERICAN TOWER REIT INC HLDG CO SHS	P	08/05/2011	11/12/2014
cc	22 BORG WARNER INC COM	P	05/21/2012	03/05/2014
dd	3 BLACKROCK INC	P	08/05/2011	11/12/2014
ee	38 BOEING COMPANY	P	09/12/2012	10/28/2014
ff	40 CALPINE CORP	P	03/06/2013	11/12/2014
gg	104 EBAY INC	P	08/26/2011	09/30/2014
hh	32 ENBRIDGE ENERGY MGMN LLC	P	06/11/2012	11/12/2014

Ref	(e) Gross sales price	(f) Depreciation allowed or (allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss)
y	974.		767.	207.
z	1,244.		1,033.	211.
aa	4,137.		3,374.	763.
bb	1,491.		761.	730.
cc	1,336.		792.	544.
dd	1,050.		488.	562.
ee	4,780.		2,768.	2,012.
ff	956.		783.	173.
gg	5,618.		4,016.	1,602.
hh	1,128.		836.	292.
<b>Total</b>				<b>7,096.</b>

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/1969

Ref	(i) FMV as of 12/31/1969	(j) Adjusted basis as of 12/31/1969	(k) Excess of col (i) over col (j), if any	(l) Gains or losses
y				207.
z				211.
aa				763.
bb				730.
cc				544.
dd				562.
ee				2,012.
ff				173.
gg				1,602.
hh				292.
<b>Total</b>				<b>7,096.</b>
<b>Total short term capital gains or (losses)</b>				<b>418.</b>

**US 990PF**

**Capital Gains and Losses for Tax on Investment Income**

**2014**

Name: OLSON-KULKA FOUNDATION

ID number: 38-6074650

Ref	(a) List and describe the kind(s) of property sold	(b) How acquired purchase donation	(c) Date acquired	(d) Date sold
ii	78 EXPRESS SCRIPT HLDG CO	P	01/16/2013	07/25/2014
jj	2 IHS INC	P	08/13/2013	11/12/2014
kk	34 INTUIT INC	P	10/01/2013	10/29/2014
ll	34 MONSANTO CO NEW DEL COM	P	11/07/2012	04/03/2014
mm	6 NIELSEN NV	P	08/05/2011	11/12/2014
nn	26 PIONEER NATURAL RES CO	P	01/02/2013	05/05/2014
oo	59 RANGE RESOURCES CORP DEL	P	07/31/2013	09/30/2014
pp	35 UNION PACIFIC CORP	P	01/26/2012	03/03/2014
qq	6 VERISK ANALYTICS INC CLASS A	P	12/31/2012	11/12/2014
rr	25 ISHARES RUSSELL 1000	P	08/05/2011	11/12/2014

Ref	(e) Gross sales price	(f) Depreciation allowed or (allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss)
ii	5,408.		4,264.	1,144.
jj	259.		215.	44.
kk	2,947.		2,268.	679.
ll	3,899.		2,928.	971.
mm	258.		168.	90.
nn	4,689.		2,903.	1,786.
oo	4,030.		4,773.	(743.)
pp	6,260.		3,925.	2,335.
qq	376.		304.	72.
rr	2,837.		1,678.	1,159.
<b>Total</b>				<b>7,537.</b>

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/1969

Ref	(i) FMV as of 12/31/1969	(j) Adjusted basis as of 12/31/1969	(k) Excess of col (i) over col (j), if any	(l) Gains or losses
ii				1,144.
jj				44.
kk				679.
ll				971.
mm				90.
nn				1,786.
oo				(743.)
pp				2,335.
qq				72.
rr				1,159.
<b>Total</b>				<b>7,537.</b>
<b>Total short term capital gains or (losses)</b>				

**US 990PF**

**Capital Gains and Losses for Tax on Investment Income**

**2014**

Name: OLSON-KULKA FOUNDATION

ID number: 38-6074650

Ref	(a) List and describe the kind(s) of property sold	(b) How acquired purchase donation	(c) Date acquired	(d) Date sold
SS	TRIBUNE PUBLISHING CO SHS CASH/LIEU	P	08/07/2014	08/07/2014

Ref	(e) Gross sales price	(f) Depreciation allowed or (allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss)
SS	10.		10.	

Total

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/1969

Ref	(i) FMV as of 12/31/1969	(j) Adjusted basis as of 12/31/1969	(k) Excess of col (i) over col (j), if any	(l) Gains or losses
SS				

Total

Total short term capital gains or (losses)

## US 990PF

## Grants and Contributions Approved for Future Payment

2014

Recipient name and address	If an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
DETROIT INST OF ARTS 5200 WOODWARD AVE DETROIT MI 48202			GENERAL FUND	375.
LITTLE SISTER OF POOR 601 MAIDEN CHOICE LANE CATONSVILLE MD 21228			GENERAL FUND	100.
CROSSROADS PREGNANCY CT 3205 SOUTH BLVD AUBURN HILLS MI 48326			GENERAL FUND	250.
SPECTRUM 2021 HIGHLAND BLVD HAYWARD CA 94542			GENERAL FUND	100.
EASTER SEALS MIR LEAGUE 233 S WACKER DR 2400 CHICAGO IL 60606			GENERAL FUND	350.
EASTER SEALS OF MI 2399 E WALTON BLVD AUBURN HILLS MI 48326			GENERAL FUND	125.
GLEANERS FOOD BNK SE MI 2131 BEAUFAIT STREET DETROIT MI 48207			GENERAL FUND	625.
FRANCISCAN MISSIONS PO BOX 130 WATERFORD WI 53185			GENERAL FUND	300.
PANCREATIC CANCER ACTN 1500 ROSECRANS AVE 200 MANHATTAN BEAC CA 90266			GENERAL FUND	350.
BENEDICTINE SIS OF ERIE 6101 EAST LAKE ROAD ERIE PA 16511			GENERAL FUND	250.
SALVATION ARMY JACKSON 806 E PEARL STREET JACKSON MI 49201			GENERAL FUND	250.
SALVATION ARMY DETROIT 1200 W FORT ST DETROIT MI 48226			GENERAL FUND	1,750.
MOST HOLY TRIN CHRISTMS 545 N MAPLE STREET FOWLER MI 48835			GENERAL FUND	1,000.
<b>Total</b>				<b>5,825.</b>

**US 990PF**

**Grants and Contributions Approved for Future Payment**

**2014**

Recipient name and address	If an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
JACKSON COMM AMBULANCE 161 W MICHIGAN AVE JACKSON MI 49201			GENERAL FUND	250.
LOUSTGARTEN FDN 1111 STEWART AVENUE BETHPAGE NY 11714			GENERAL FUND	250.
CATHOLIC CHAR OF SOUTH 4925 PACKARD STREET ANN ARBOR MI 48108			GENERAL FUND	250.
SALESIAN MISSIONS 2 lefevres lane NEW ROCHELLE NY 10801			GENERAL FUND	250.
CASCADES HUMANE SOCIETY 1515 CARMEN DRIVE JACKSON MI 49202			GENERAL FUND	250.
<b>Total</b>				1,250.



US 990

## Investments: Corporate Stock as of Year End

2014

Description	Book value	FMV
8 SHS ACTAVIS PLC	2,059.	2,059.
71 SHS AMERICAN TOWER REIT	7,018.	7,018.
64 SHS CHENIERE ENERGY	4,506.	4,506.
13 SHS BLACKROCK INC	4,648.	4,648.
89 SHS COMCAST CR NEW CL A SPL	5,123.	5,123.
84 SHS BORG WARNER INC	4,616.	4,616.
230 SHS CALPINE CORP	5,090.	5,090.
75 SHS DELPHI AUTOMOTIVE PLC	5,454.	5,454.
695113 SHS FRAC ENBRIDGE ENERGY MGMNT LLC		
116 SHS ENBRIDGE ENERGY MGMT LLC	4,500.	4,500.
536.3177 SHS GOOGLE INC CL C	4,738.	4,738.
30 SHS SANDISK CORP INC	2,939.	2,939.
78 SHS TEVA PHARMACTCL INDS ADR	4,486.	4,486.
95 TRIBUNE MEDIA COMPANY	5,678.	5,678.
36 SHS IHS INC	4,100.	4,100.
45 SHS INTUIT INC COMMON	4,149.	4,149.
142 SHS INVESCO LTD	5,612.	5,612.
26 UNITED RENTALS INC COM	2,652.	2,652.
136 SHS NIELSEN NV	6,083.	6,083.
65 SHS VERISK ANALYTICS INC CLASS A	4,163.	4,163.
193 SHS ACTIVISION BLIZZARD INC	3,889.	3,889.
29 SHS COOPER COS INC COM NEW	4,701.	4,701.
16 SHS VISA INC CL A SHRS	4,195.	4,195.
	100,399.	100,399.

**US 990** **Investments - Other**  
**990-PF: Page 2, Line 13**

**2014**

Description	Basis of valuation	Book value	FMV
254 ISHARES RUSSELL 1000	FMV	29,116.	29,116.
10133 METROPOLITAN WEST TOTAL RET	FMV	110,450.	110,450.
10068 MFS RESEARCH BOND FUND CL I	FMV	109,842.	109,842.
20138 PIMCO TOTAL RETURN FUND CL P	FMV	214,671.	214,671.
963 VOYA SMALL COMPANY FUND	FMV	16,910.	16,910.
124 AMERICAN CAP INC BLDR	FMV	7,394.	7,394.
582 LORD ABBETT INFLATION	FMV	7,533.	7,533.
981 LORD ABBETT FLOATING	FMV	8,989.	8,989.
3438 LORD ABBETT SHORT	FMV	15,337.	15,337.
2102 LORD ABBETT SHORT	FMV	9,438.	9,438.
13245 LORD ABBETT INCOME FD A	FMV	38,014.	38,014.
		567,694.	567,694.