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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015, or tax year beginning 01-01-2015, and ending 12-31-2015

Name of foundation THE JOHN E KUENZL FOUNDATION INC		A Employer identification number 39-1998578	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 2886		B Telephone number (see instructions) (920) 231-5890	
City or town, state or province, country, and ZIP or foreign postal code OSHKOSH, WI 549032886		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address 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 ☐ F If the foundation is in a 60-month termination under section 507(b)(1)(B), 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) \$ 36,395,996		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	

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))		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	200,000			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	15,580	15,580		
	4 Dividends and interest from securities	1,398,297	1,355,103		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 _____	78,519			
	b Gross sales price for all assets on line 6a _____ 1,481,229				
	7 Capital gain net income (from Part IV, line 2)		78,519		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	11,513	-63,975		
	12 Total. Add lines 1 through 11	1,703,909	1,385,227		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	41,213	20,607		20,606
	c Other professional fees (attach schedule)	67,681	67,681		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	280,603	6,834		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	339	118		0
	24 Total operating and administrative expenses. Add lines 13 through 23	389,836	95,240		20,606
	25 Contributions, gifts, grants paid	1,716,236			1,716,236
	26 Total expenses and disbursements. Add lines 24 and 25	2,106,072	95,240		1,736,842
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-402,163			
	b Net investment income (if negative, enter -0-)		1,289,987		
	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	69,144	8,598	8,598
	2	Savings and temporary cash investments	1,475,082	427,238	427,238
	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) ▶ _____ 316,894			
		Less allowance for doubtful accounts ▶ _____ 0	442,514	316,894	316,894
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	24,828,647	25,431,136	25,996,720
	c	Investments—corporate bonds (attach schedule)	2,249,360	2,991,596	2,924,659
	11	Investments—land, buildings, and equipment basis ▶ _____			
	Less accumulated depreciation (attach schedule) ▶ _____				
12	Investments—mortgage loans.				
13	Investments—other (attach schedule)	12,511,450	12,056,127	6,720,487	
14	Land, buildings, and equipment basis ▶ _____ 1,400				
	Less accumulated depreciation (attach schedule) ▶ _____	0	1,400	1,400	
15	Other assets (describe ▶ _____)				
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	41,576,197	41,232,989	36,395,996	
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	41,576,197	41,232,989	
	30	Total net assets or fund balances(see instructions)	41,576,197	41,232,989	
31	Total liabilities and net assets/fund balances(see instructions)	41,576,197	41,232,989		

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 41,576,197
2	Enter amount from Part I, line 27a	2 -402,163
3	Other increases not included in line 2 (itemize) ▶ _____	3 58,955
4	Add lines 1, 2, and 3	4 41,232,989
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 41,232,989

Part IV

Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1 a	PUBLICLY TRADED SECURITIES	P		
b	CAPITAL GAINS DIVIDENDS	P		
c				
d				
e				

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a 1,207,176		1,402,710	-195,534
b 274,053			274,053
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
a			-195,534
b			274,053
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	78,519
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))
2014	1,043,407	38,641,474	0 027002
2013	1,027,843	22,390,433	0 045905
2012	1,065,070	21,274,833	0 050062
2011	1,116,508	21,786,286	0 051248
2010	1,151,525	23,211,313	0 049611

2 Total of line 1, column (d).	2	0 223828
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 044766
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	36,578,949
5 Multiply line 4 by line 3.	5	1,637,493
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	12,900
7 Add lines 5 and 6.	7	1,650,393
8 Enter qualifying distributions from Part XII, line 4.	8	1,736,842

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

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

12,900

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

12,900

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

36,554

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

36,554

8

Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.

8

9

Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed.

9

10

Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.

10

23,654

11

Enter the amount of line 10 to be Credited to 2015 estimated tax ☒ 23,654 Refunded ☒

11

0

Part VII-A

Statements Regarding Activities

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 Instructions for definition)?
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

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 ☒ \$ 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

Yes

b

If "Yes," has it filed a tax return on Form 990-T for this year?

4b

Yes

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):
☒ WI

b

If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation.

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 2015 or the taxable year beginning in 2015 (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

No

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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	Yes	
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 ▶GERALD STADTMUELLER Located at ▶100 CITY CENTER OSHKOSH WI Telephone no ▶(920) 231-5890 ZIP +4 ▶54903			
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 2015, 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? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	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 2015?	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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? ☐ 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 2015 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 2015.</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 2015?	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 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)?

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	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
JAMES J WILLIAMSON	VICE PRESIDENT/SECRETARY 0 50	0	0	0
PO BOX 2886 OSHKOSH, WI 54903				
GERALD STADTMUELLER	PRESIDENT/TREASURER 0 50	0	0	0
PO BOX 2886 OSHKOSH, WI 54903				

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	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
NONE				

Total

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

0

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Part VIII

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

[illegible]

Total number of others receiving over \$50,000 for professional services.	0
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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 instructions	
3	

[illegible]

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	16,752,016
b	Average of monthly cash balances.	1b	853,348
c	Fair market value of all other assets (see instructions).	1c	19,530,625
d	Total (add lines 1a, b, and c).	1d	37,135,989
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	37,135,989
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	557,040
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	36,578,949
6	Minimum investment return. Enter 5% of line 5.	6	1,828,947

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	1,828,947
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	12,900
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	3,022
c	Add lines 2a and 2b.	2c	15,922
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,813,025
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,813,025
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	1,813,025

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	1,736,842
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	1,736,842
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	12,900
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,723,942

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 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				1,813,025
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			1,715,212	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				
d From 2013.				
e From 2014.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 1,736,842				
a Applied to 2014, but not more than line 2a			1,715,212	
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 2015 distributable amount.				21,630
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)	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.		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 2014 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				1,791,395
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).	0			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . .	0			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.	0			
10 Analysis of line 9				
a Excess from 2011.				
b Excess from 2012.				
c Excess from 2013.				
d Excess from 2014.				
e Excess from 2015.				

Part XV

Supplementary Information(continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	1,716,236
b Approved for future payment				
Total			3b	0

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	15,580	
4	Dividends and interest from securities. . . .			14	1,398,297	
5	Net rental income or (loss) from real estate					
a	Debt-financed property.					
b	Not debt-financed property.					
6	Net rental income or (loss) from personal property					
7	Other investment income.					
8	Gain or (loss) from sales of assets other than inventory			18	78,519	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory . . .					
11	Other revenue					
	a INCOME PER GAMBRINUS ENTERPRISES, INC K- 1	523000	76,864			
	b INCOME PER CENTURY INVESTMENT FUND V K- 1	523000	-1,376			
	c INCOME PER LEE BEVERAGE CO			14	-63,975	
	d					
	e					
12	Subtotal Add columns (b), (d), and (e). . .		75,488		1,428,421	0
13	Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations)			13		1,503,909

[illegible]

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AMERICAN RED CROSS OF EASTERN WI 515 S WASHBURN ST 206 OSHKOSH,WI 54904	NONE	PC	GENERAL PURPOSE	10,000
APPLETON ICE INC 1717 E WITZKE BLVD APPLETON,WI 54911	NONE	PC	GENERAL PURPOSE	2,500
BOYS AND GIRLS CLUB OF OSHKOSH 501 EAST PARKWAY AVENUE OSHKOSH,WI 54901	NONE	PC	CAMP RADFORD	50,000
BOYS AND GIRLS CLUB OF OSHKOSH 501 EAST PARKWAY AVENUE OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	100,000
CLARITY CARE 424 WASHINGTON AVE OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	10,000
COMMUNITY FOR HOPE 36 BROAD ST OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	10,000
DAY BY DAY WARMING SHELTER 449 HIGH AVE OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	20,000
ELDORADO FIRE DEPARTMENT W9218 COUNTY ROAD N ELDORADO,WI 54932	NONE	PC	GENERAL PURPOSE	2,500
EMMELINE COOK B 1600 HAZEL STREET OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	25,000
ENDEAVOR FD 631 S LIMITS RD ENDEAVOR,WI 53930	NONE	PC	GENERAL PURPOSE	2,500
FRIENDS OF WISCONSIN PUBLIC TELEVISION 821 UNIVERSITY AVE NO 1076 MADISON,WI 53706	NONE	PC	GENERAL PURPOSE	25,000
GO -EDC FOUNDATION 2380 HIGWAY 44 STE B OSHKOSH,WI 54904	NONE	PC	GENERAL PURPOSE	130,000
GROWING OSHKOSH 530 BAY SHORE DR OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	20,000
HABITAT FOR HUMANITY OF OSHKOSH PO BOX 2692 OSHKOSH,WI 54903	NONE	PC	GENERAL PURPOSE	100,000
JASPER PICKETT FOUNDATION PO BOX 336 PICKETT,WI 54964	NONE	PC	GENERAL PURPOSE	1,000
Total				1,716,236

Form 990PF Part XV Line 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>				
JP MORGAN CHARITABLE GIVING TRUST 270 PARK AVE NEW YORK,NY 10017	NONE	PC	GENERAL PURPOSE	74,000
LIVING HEALTHY COMMUNITY CLINIC 510 DOCTORS COURT OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	15,000
NEENAH HIGH SCHOOL BOOSTER CLUB 1375 MARTINGALE LANE NEENAH,WI 54956	NONE	PC	GENERAL PURPOSE	6,500
OCCUPAWS GUIDE DOG ASSOCIATION 5659 ENCHANTED VALLEY RD CROSS PLAINS,WI 53528	NONE	PC	GENERAL PURPOSE	2,000
OMRO RUSHFORD FIRE DEPARTMENT 502 WHURON ST OMRO,WI 54963	NONE	PC	GENERAL PURPOSE	2,500
OSHKOSH AREA COMMUNITY FOUNDATION 230 OHIO ST 100 OMRO,WI 54902	NONE	PC	FIREFIGHTER'S WORKOUT EQUIPMENT	3,000
OSHKOSH AREA COMMUNITY FOUNDATION 230 OHIO ST 100 OSHKOSH,WI 54902	NONE	PC	COMMAND VEHICLE	10,336
OSHKOSH AREA COMMUNITY FOUNDATION 230 OHIO ST 100 OSHKOSH,WI 54902	NONE	PC	US OIL VENTURE	25,000
OSHKOSH AREA COMMUNITY FOUNDATION 230 OHIO ST 100 OSHKOSH,WI 54902	NONE	PC	LIGHT THE BRIDGES	3,000
OSHKOSH AREA HUMANE SOCIETY 1925 SHELTER CT OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	15,000
OSHKOSH AREA UNITED WAY 36 BROAD STREET 100 OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	105,000
OSHKOSH CELEBRATION OF LIGHTS 2345 ABBEY AVE OSHKOSH,WI 54904	NONE	PC	GENERAL PURPOSE	3,000
OSHKOSH CHAMBER OF COMMERCE FOUNDATION 120 JACKSON ST OSHKOSH,WI 54901	NONE	PC	WATERFEST	100,000
OSHKOSH CHAMBER OF COMMERCE FOUNDATION 120 JACKSON ST OSHKOSH,WI 54901	NONE	PC	WATERFEST	15,000
OSHKOSH COMMUNITY FOOD PANTRY 2551 JACKSON ST OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	110,000
Total			3a	1,716,236

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
OSHKOSH COMMUNITY YMCA 324 WASHINGTON AVE OSHKOSH,WI 54901	NONE	PC	ROBOTICS PROGRAM	5,000
OSHKOSH COMMUNITY YMCA 324 WASHINGTON AVE OSHKOSH,WI 54901	NONE	PC	STRONG KIDS	65,000
OSHKOSH COMMUNITY YMCA 324 WASHINGTON AVE OSHKOSH,WI 54901	NONE	PC	CAPITAL CAMPAIGN	300,000
OSHKOSH OPERA HOUSE FOUNDATION 222 PEARL AVENUE OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	35,000
OSHKOSH SYMPHONY ORCHESTRA 36 BROAD STR STE LL20 OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	10,000
PAINE ART CENTER AND GARDENS 1410 ALGOMA BLVD OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	250,000
PAINE ART CENTER AND GARDENS 1410 ALGOMA BLVD OSHKOSH,WI 54901	NONE	PC	WOUNDED WARRIOR	1,400
REACH COUNSELING SERVICES 1370 S COMMERCIAL ST NEENAH,WI 54956	NONE	PC	GENERAL PURPOSE	2,500
SALVATION ARMY 417 ALGOMA BLVD OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	5,000
SCANDINAVIA VOLUNTEER FIRE DEPARTMENT 349 N MAIN ST SCANDINAVIA,WI 54977	NONE	PC	GENERAL PURPOSE	2,500
SOLUTIONS RECOVERY INC 621 EVANS ST OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	2,000
TOWN OF OSHKOSH FD 101 COURT STREET OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	2,500
TRI-COUNTY COMMUNITY DENTAL CLINIC 9 TRI-PARK WAY APPLETON,WI 54914	NONE	PC	GENERAL PURPOSE	5,000
WINNEBAGO COUNTY HISTORICAL AND ARCHEOLOGICAL SOCIETY 234 CHURCH AVENUE OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	5,000
WINNEBAGO COUNTY LITERACY COUNCIL 106 WASHINGTON AVE OSHKOSH,WI 54901	NONE	PC	GENERAL PURPOSE	2,500
Total				1,716,236

Form 990PF Part XV Line 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>				
YMCA OF THE FOX CITIES 229 EAST COLLEGE AVENUE APPLETON, WI 54911	NONE	PC	CAPITAL CAMPAIGN	25,000
Total				3a 1,716,236

TY 2015 Accounting Fees Schedule

Name: THE JOHN E KUENZL FOUNDATION INC

EIN: 39-1998578

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	41,213	20,607		20,606

TY 2015 Applied to Prior Year Election

Name: THE JOHN E KUENZL FOUNDATION INC

EIN: 39-1998578

Election: PURSUANT TO IRC SEC. 4942(H)(2) AND REG. 53.4942(A)3(D)(2), THE ABOVE REFERENCED FOUNDATION HEREBY ELECTS TO TREAT CURRENT YEAR QUALIFYING DISTRIBUTIONS IN EXCESS OF THE IMMEDIATELY PRECEDING TAX YEAR'S UNDISTRIBUTED INCOME AS BEING MADE OUT OF UNDISTRIBUTED INCOME FOR THE TAX YEAR ENDING 12/31/08.

TY 2015 Investments Corporate Bonds Schedule**Name:** THE JOHN E KUENZL FOUNDATION INC**EIN:** 39-1998578

Name of Bond	End of Year Book Value	End of Year Fair Market Value
DODGE & COX INCOME FUND	362,238	384,796
DOUBLELINE FDS TR	756,939	738,617
JP MORGAN HIGH YIELD BOND FUND	203,945	176,175
JP MORGAN SHORT DURATION BOND	503,163	497,045
JP MORGAN STRATEGIC INCOME	366,471	341,512
JPM CORE BOND FUND - SEL	669,432	663,385
JP MORGAN UNCONSTRAINED DEBT FUND	129,408	123,129

TY 2015 Investments Corporate Stock Schedule

Name: THE JOHN E KUENZL FOUNDATION INC

EIN: 39-1998578

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ARTISIAN INTL VALUE FUND	307,331	395,119
CAPITAL GR NON US EQUITY	689,645	700,685
CVS CORP	49,902	116,316
DELAWARE EMERGING MARKETS FUND	615,371	443,389
FOSTER WHEELER	9,979	5,610
ISHARES TR RUSSELL MIDCAP INDEX	374,589	492,073
JP MORGAN INTREPID AMERICAN	230,872	298,958
JP MORGAN LARGE CAP GROWTH FUND	225,131	363,575
JP MORGAN US LARGE CAP CORE PLUS	584,014	636,543
KUENZL INVESTMENT CORP	15,715,373	15,693,640
NEUBERGER BERMAN MULTI CAP	473,202	669,927
NUVEEN MUN HIGH INCOME OPPORTUNITY FUND	285,098	327,853
OAKMARK INTERNATIONAL FUND	323,403	273,214
PIONEER MUN HIGH INCOME ADVANTAGE TR	287,089	291,593
PRUDENTIAL JENNISON MID-CAP	716,197	706,731
SPDR S&P 500 EFT TRUST	1,121,043	1,408,538
T ROWE PRICE NEW ASIA	660,437	631,822
PARNASSUS EQUITY INDOME FUND	779,770	742,828
JP MORGAN SMALL CAP VALUE FUND	165,056	144,601
ISHARES MSCI EAFE INDEX FUND	823,522	713,683
BROWN ADV JAPAN ALPHA OPP FUND	168,684	171,361
ISHARES MSCI EMERGING MARKET	83,204	61,740
VANGUARD	570,871	556,661
ISHARES MSCI INDIA ETF	171,353	150,260

TY 2015 Investments - Other Schedule**Name:** THE JOHN E KUENZL FOUNDATION INC**EIN:** 39-1998578

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
CENTURY INVESTMENT FUND V	AT COST	69,495	0
JEK REAL ESTATE CORP	AT COST	8,581,263	3,520,091
PIMCO COMMODITIES PLUS STRATEGY	AT COST	189,220	136,214
JP MORGAN ACCESS MULTI-STRATEGY FUND II	AT COST	2,711,705	2,541,627
JP MORGAN REALTY INC FD - INSTL	AT COST	475,048	492,405
CARTER VALIDUS MISSION CRITICAL REIT	AT COST	29,396	30,150

TY 2015 Other Expenses Schedule

Name: THE JOHN E KUENZL FOUNDATION INC

EIN: 39-1998578

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADMINISTRATIVE FEES	118	118		0
	221	0		0

TY 2015 Other Income Schedule**Name:** THE JOHN E KUENZL FOUNDATION INC**EIN:** 39-1998578

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
INCOME PER GAMBRINUS ENTERPRISES, INC K-1	76,864		76,864
INCOME PER CENTURY INVESTMENT FUND V K-1	-1,376		-1,376
INCOME PER LEE BEVERAGE CO	-63,975	-63,975	-63,975

TY 2015 Other Increases Schedule

Name: THE JOHN E KUENZL FOUNDATION INC

EIN: 39-1998578

Description	Amount
ADJUSTMENTS TO VARIOUS INVESTMENTS' COST BASIS	58,955

TY 2015 Other Professional Fees Schedule

Name: THE JOHN E KUENZL FOUNDATION INC

EIN: 39-1998578

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
VALUATION FEES	67,681	67,681		0

TY 2015 Taxes Schedule**Name:** THE JOHN E KUENZL FOUNDATION INC**EIN:** 39-1998578

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INCOME TAXES	273,769	0		0
FOREIGN TAX PAID	6,834	6,834		0

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 2015
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Name of the organization THE JOHN E KUENZL FOUNDATION INC	Employer identification number 39-1998578
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Organization type (check one)

Filers of: Form 990 or 990-EZ Form 990-PF	Section: ☐ 501(c)() (enter number) organization ☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation ☐ 527 political organization ☒ 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 other 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 33¹/₃% 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 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 JOHN E KUENZL FOUNDATION INC	Employer identification number 39-1998578
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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	KUENZL INVESTMENT CORP	\$ 200,000	Person ☒
	100 CITY CENTER PO BOX 2886		Payroll ☐
	OSHKOSH, WI 54903		Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)

Name of organization THE JOHN E KUENZL FOUNDATION INC	Employer identification number 39-1998578
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Part II **Noncash Property**
(see instructions) Use duplicate copies of Part II if additional space is needed

[illegible]

Employer identification number

39-1998578

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. 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
	--		