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

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016, or tax year beginning 01-01-2016, and ending 12-31-2016

Name of foundation  
KALSCHUR FAMILY FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)  
1221 JOHN Q HAMMONS DR

City or town, state or province, country, and ZIP or foreign postal code  
MADISON, WI 537172912

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

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) \$ 11,186,933

J Accounting method

☒ Cash

☐ Accrual

☐ Other (specify )

(Part I, column (d) must be on cash basis )

A Employer identification number  
39-6681490

B Telephone number (see instructions)  
(608) 826-2208

C If exemption application is pending, check here

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

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

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)			
	2 Check if the foundation is not required to attach Sch B			
	3 Interest on savings and temporary cash investments	482	482	
	4 Dividends and interest from securities	184,703	184,703	
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	358,433		
	b Gross sales price for all assets on line 6a			
	7 Capital gain net income (from Part IV, line 2)		358,433	
	8 Net short-term capital gain			
	9 Income modifications			
	10a Gross sales less returns and allowances			
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	543,618	543,618		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	52,371	20,948	31,423
	14 Other employee salaries and wages			
	15 Pension plans, employee benefits			
	16a Legal fees (attach schedule)			
	b Accounting fees (attach schedule)	1,500	750	750
	c Other professional fees (attach schedule)	41,014	41,014	0
	17 Interest			
	18 Taxes (attach schedule) (see instructions)	24,672	2,888	0
	19 Depreciation (attach schedule) and depletion			
	20 Occupancy			
	21 Travel, conferences, and meetings	1,943	0	0
	22 Printing and publications			
	23 Other expenses (attach schedule)			
	24 Total operating and administrative expenses. Add lines 13 through 23	121,500	65,600	32,173
	25 Contributions, gifts, grants paid	396,752		396,752
	26 Total expenses and disbursements. Add lines 24 and 25	518,252	65,600	428,925
	27 Subtract line 26 from line 12			
	a Excess of revenue over expenses and disbursements	25,366		
	b Net investment income (if negative, enter -0-)		478,018	
	c Adjusted net income(if negative, enter -0-)			

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2016)

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 (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing . . . . .			
	2	Savings and temporary cash investments . . . . .	167,847	596,336	596,336
	3	Accounts receivable ▶ <u>539</u>			
		Less allowance for doubtful accounts ▶ _____		539	539
	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)	250,431	150,556	155,190
	b	Investments—corporate stock (attach schedule) . . . . .	8,335,007	8,031,220	10,434,868
	c	Investments—corporate bonds (attach schedule) . . . . .			
	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	<b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	8,753,285	8,778,651	11,186,933	
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	<b>Total liabilities</b> (add lines 17 through 22) . . . . .	0	0	
Net Assets or Fund Balances	<b>Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/></b> <b>and complete lines 24 through 26 and lines 30 and 31.</b>				
	24	Unrestricted . . . . .			
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
	<b>Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/></b> <b>and complete lines 27 through 31.</b>				
	27	Capital stock, trust principal, or current funds . . . . .	8,753,285	8,778,651	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	0	0	
	30	<b>Total net assets or fund balances</b> (see instructions) . . . . .	8,753,285	8,778,651	
31	<b>Total liabilities and net assets/fund balances</b> (see instructions) .	8,753,285	8,778,651		

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	8,753,285
2	Enter amount from Part I, line 27a . . . . .	2	25,366
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3 . . . . .	4	8,778,651
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	8,778,651

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

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

  

(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)
<b>a</b> 70,586		62,866	7,720
<b>b</b> 1,631,361		1,450,821	180,540
<b>c</b> 170,173			170,173
<b>d</b>			
<b>e</b>			

  

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	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
<b>a</b>			7,720
<b>b</b>			180,540
<b>c</b>			170,173
<b>d</b>			
<b>e</b>			

  

<b>2</b> 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 }	<b>2</b>	358,433
<b>3</b> 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		<b>3</b>	

**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))
2015	564,294	10,699,054	0 052742
2014	537,532	10,905,927	0 049288
2013	407,825	9,511,681	0 042876
2012	424,771	8,264,536	0 051397
2011	404,562	7,800,038	0 051867

  

<b>2</b> Total of line 1, column (d)	<b>2</b>	0 248170
<b>3</b> 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	<b>3</b>	0 049634
<b>4</b> Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	<b>4</b>	10,364,722
<b>5</b> Multiply line 4 by line 3	<b>5</b>	514,443
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	4,780
<b>7</b> Add lines 5 and 6	<b>7</b>	519,223
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	428,925

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

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

<b>1a</b>	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>b</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 . . . . .	<b>1</b>	9,560
<b>c</b>	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>	0
<b>3</b>	Add lines 1 and 2. . . . .	<b>3</b>	9,560
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>	0
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- . . . . .	<b>5</b>	9,560
<b>6</b>	Credits/Payments		
<b>a</b>	2016 estimated tax payments and 2015 overpayment credited to 2016	<b>6a</b>	26,409
<b>b</b>	Exempt foreign organizations—tax withheld at source . . . . .	<b>6b</b>	
<b>c</b>	Tax paid with application for extension of time to file (Form 8868) . . . . .	<b>6c</b>	
<b>d</b>	Backup withholding erroneously withheld . . . . .	<b>6d</b>	
<b>7</b>	Total credits and payments. Add lines 6a through 6d. . . . .	<b>7</b>	26,409
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	<b>8</b>	
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . . ▶	<b>9</b>	
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . ▶	<b>10</b>	16,849
<b>11</b>	Enter the amount of line 10 to be <b>Credited to 2017 estimated tax</b> ▶ 9,560 <b>Refunded</b> ▶	<b>11</b>	7,289

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> 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? . . . . .	<b>1a</b>	No
<b>b</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 <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities	<b>1b</b>	No
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year? . . . . .	<b>1c</b>	No
<b>d</b> 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		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____ 0		
<b>2</b> 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	<b>2</b>	No
<b>3</b> 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 . . . . .	<b>3</b>	No
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .	<b>4a</b>	No
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .	<b>4b</b>	
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . If "Yes," attach the statement required by General Instruction T	<b>5</b>	No
<b>6</b> 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? . . . . .	<b>6</b>	No
<b>7</b> 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 . . . . .	<b>7</b>	Yes
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ WI		
<b>b</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 .	<b>8b</b>	Yes
<b>9</b> 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 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV . . . . .	<b>9</b>	No
<b>10</b> Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses . . . . .	<b>10</b>	No

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

<b>11</b>	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). . . . .	<b>11</b>		<b>No</b>
<b>12</b>	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) . . . . .	<b>12</b>		<b>No</b>
<b>13</b>	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	<b>13</b>	<b>Yes</b>	
<b>14</b>	The books are in care of ► LISA GARCIA Telephone no ► (608) 495-1379			

Located at ► 1221 JOHN Q HAMMONS DR MADISON WI ZIP+4 ► 537172912

<b>15</b>	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here . . . . .	<input type="checkbox"/>		
	and enter the amount of tax-exempt interest received or accrued during the year . . . . .	► <b>15</b>		
<b>16</b>	At any time during calendar year 2016, 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?	<b>16</b>	<b>Yes</b>	<b>No</b>
	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 ►			

**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.**

<b>1a</b>	During the year did the foundation (either directly or indirectly)		<b>Yes</b>	<b>No</b>
	(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? ( <b>Exception.</b> 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>b</b>	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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)? . . . . .	<b>1b</b>		
	Organizations relying on a current notice regarding disaster assistance check here. . . . .			
<b>c</b>	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 2016? . . . . .	<b>1c</b>		<b>No</b>
<b>2</b>	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))			
<b>a</b>	At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? . . . . .		<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
	If "Yes," list the years ► 20____, 20____, 20____, 20____			
<b>b</b>	Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see instructions) . . . . .	<b>2b</b>		
<b>c</b>	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
<b>3a</b>	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>b</b>	If "Yes," did it have excess business holdings in 2016 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 2016) . . . . .	<b>3b</b>		
<b>4a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>		<b>No</b>
<b>b</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 2016?	<b>4b</b>		<b>No</b>

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

<b>5a</b> During the year did the foundation pay or incur any amount to <ul style="list-style-type: none"> <li><b>(1)</b> Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span></li> <li><b>(2)</b> Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span></li> <li><b>(3)</b> Provide a grant to an individual for travel, study, or other similar purposes? <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span></li> <li><b>(4)</b> Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span></li> <li><b>(5)</b> Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span></li> </ul> <b>b</b> If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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)? <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> Organizations relying on a current notice regarding disaster assistance check here. <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span>	<b>5b</b>		
<b>c</b> 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? <span style="float: right;"><input type="checkbox"/> Yes <input type="checkbox"/> No</span> <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>			
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span>			
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <i>If "Yes" to 6b, file Form 8870</i>	<b>6b</b>		<b>No</b>
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span>			
<b>b</b> If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <span style="float: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span>	<b>7b</b>		

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

<b>1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).</b>				
(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
SVA PLUMB FINANCIAL LLC 1221 JOHN Q HAMMONS DR MADISON, WI 537172912	TRUSTEE 10 00	52,371	0	0
<b>2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."</b>				
(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
NONE				
<b>Total number of other employees paid over \$50,000.</b>				0

**Part VIII**

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

**3**

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

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

**Part IX-A**

**Summary of Direct Charitable Activities**

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

	Expenses
<b>1</b> THE FOUNDATION AWARDED 79 GRANTS TO EXEMPT ORGANIZATIONS IN 2016	396,752
<b>2</b>	
<b>3</b>	
<b>4</b>	

**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
<b>1</b>	
<b>2</b>	
All other program-related investments See instructions	
<b>3</b>	
<b>Total.</b> Add lines 1 through 3	0



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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities.	<b>1a</b>	10,192,413
<b>b</b>	Average of monthly cash balances.	<b>1b</b>	330,147
<b>c</b>	Fair market value of all other assets (see instructions).	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c).	<b>1d</b>	10,522,560
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets.	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d.	<b>3</b>	10,522,560
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	<b>4</b>	157,838
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4.	<b>5</b>	10,364,722
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5.	<b>6</b>	518,236

**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.)

<b>1</b>	Minimum investment return from Part X, line 6.	<b>1</b>	518,236
<b>2a</b>	Tax on investment income for 2016 from Part VI, line 5.	<b>2a</b>	9,560
<b>b</b>	Income tax for 2016 (This does not include the tax from Part VI).	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b.	<b>2c</b>	9,560
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1.	<b>3</b>	508,676
<b>4</b>	Recoveries of amounts treated as qualifying distributions.	<b>4</b>	0
<b>5</b>	Add lines 3 and 4.	<b>5</b>	508,676
<b>6</b>	Deduction from distributable amount (see instructions).	<b>6</b>	0
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	<b>7</b>	508,676

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	<b>1a</b>	428,925
<b>b</b>	Program-related investments—total from Part IX-B.	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required).	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule).	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	<b>4</b>	428,925
<b>5</b>	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).	<b>5</b>	0
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4.	<b>6</b>	428,925

**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 2015	(c) 2015	(d) 2016
<b>1</b> Distributable amount for 2016 from Part XI, line 7				508,676
<b>2</b> Undistributed income, if any, as of the end of 2016				
<b>a</b> Enter amount for 2015 only. . . . .			0	
<b>b</b> Total for prior years 20____, 20____, 20____		0		
<b>3</b> Excess distributions carryover, if any, to 2016				
<b>a</b> From 2011. . . . .				
<b>b</b> From 2012. . . . .				5,919
<b>c</b> From 2013. . . . .				
<b>d</b> From 2014. . . . .				14,614
<b>e</b> From 2015. . . . .				64,799
<b>f</b> Total of lines 3a through e. . . . .	85,332			
<b>4</b> Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 428,925				
<b>a</b> Applied to 2015, but not more than line 2a			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2016 distributable amount. . . . .				428,925
<b>e</b> Remaining amount distributed out of corpus	0			
<b>5</b> Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a) )	79,751			79,751
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	5,581			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .		0		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . .		0		
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .		0		
<b>e</b> Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .			0	
<b>f</b> Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017 . . . . .				0
<b>7</b> 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			
<b>8</b> Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions). . . . .	0			
<b>9</b> Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a . . . . .	5,581			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2012. . . . .				
<b>b</b> Excess from 2013. . . . .				
<b>c</b> Excess from 2014. . . . .				
<b>d</b> Excess from 2015. . . . .				5,581
<b>e</b> Excess from 2016. . . . .				

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

<b>1a</b> If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling. . . . . ▶					
<b>b</b> Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)					
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .	Tax year	Prior 3 years			(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
<b>b</b> 85% of line 2a . . . . .					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon					
<b>a</b> "Assets" alternative test—enter					
<b>(1)</b> Value of all assets . . . . .					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .					
<b>c</b> "Support" alternative test—enter					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . .					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . .					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> 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.)**

<b>1 Information Regarding Foundation Managers:</b>	
<b>a</b> 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>b</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	
<b>2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:</b>	
Check here <input type="checkbox"/> 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.	
<b>a</b> The name, address, and telephone number or e-mail address of the person to whom applications should be addressed KALSCHEUR FAMILY FOUNDATION 3234 VALLEY SPRING RD MOUNT HOREB, WI 535721236 (608) 355-3040	
<b>b</b> The form in which applications should be submitted and information and materials they should include AMOUNT OF GRANT FUNDS REQUESTED AND PROPOSED USE OF THE FUNDS	
<b>c</b> Any submission deadlines NONE	
<b>d</b> Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors PROVIDE GRANTS TO ORGANIZATIONS EXEMPT UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE	

**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)				
<b>a</b> <i>Paid during the year</i> See Additional Data Table				
<b>Total</b> . . . . .			<b>3a</b>	396,752
<b>b</b> <i>Approved for future payment</i>				
<b>Total</b> . . . . .			<b>3b</b>	0

## Enter gross amounts unless otherwise indicated

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

[illegible]

## Part XVII

- |       | Yes | No |
|-------|-----|----|
| 1a(1) |     | No |
| 1a(2) |     | No |
| 1b(1) |     | No |
| 1b(2) |     | No |
| 1b(3) |     | No |
| 1b(4) |     | No |
| 1b(5) |     | No |
| 1b(6) |     | No |
| 1c    |     | No |

[illegible]

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

- b** If "Yes," complete the following schedule

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

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

Print/Type preparer's name  KATHLEEN MERING CPA	Preparer's Signature	Date	Check if self-employed ► <input type="checkbox"/>	PTIN  P01248611
Firm's name ► WEGNER CPAS LLP				Firm's EIN ► 39-0974031
Firm's address ► PO BOX 150  BARABOO, WI 539130150				Phone no (608) 356-3966

Form 990FP 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				
ALZHEIMER'S DISEASE AND RELATED DISORDERS ASSOCIATION INC 402 E PLAZA DR CARTERVILLE, IL 629182090	N/A	PC	GENERAL SUPPORT	5,000
AMERICAN LEGION POST 113 102 S 3RD ST MOUNT HOREB, WI 535722060	N/A	PC	GENERAL SUPPORT	20,000
AMERICAN LEGION POST 245 2217 AMERICAN LEGION DR CROSS PLAINS, WI 535289604	N/A	PC	GENERAL SUPPORT	8,000
ASHTON HOME TALENT BASEBALL LEAGUE PO BOX 620038 MIDDLETON, WI 535620038	N/A	PC	GENERAL SUPPORT	300
AVE MARIA UNIVERSITY 5050 AVE MARIA BLVD AVE MARIA, FL 341429505	N/A	PC	GENERAL SUPPORT	2,000
BADGER BASKETBALL BOOSTERS INC 601 W DAYTON ST MADISON, WI 537151206	N/A	PC	GENERAL SUPPORT	3,000
BILLY GRAHAM EVANGELIST ASSOCIATION 1 BILLY GRAHAM PKWY CHARLOTTE, NC 282010001	N/A	PC	GENERAL SUPPORT	1,000
BLACKHAWK EVANGELICAL FREE CHURCH INC 9620 BRADER WAY MIDDLETON, WI 535629296	N/A	PC	GENERAL SUPPORT	10,000
COTS INC 913 S WEST AVE APPLETON, WI 549152394	N/A	PC	GENERAL SUPPORT	2,000
CHILDREN'S DYSLEXIA CENTERS INC 301 WISCONSIN AVE MADISON, WI 537032107	N/A	PC	GENERAL SUPPORT	500
CROSS PLAINS AREA EMS 2027 PARK ST CROSS PLAINS, WI 535289610	N/A	PC	GENERAL SUPPORT	500
CROSS PLAINS FIRE DEPARTMENT 1501 BOURBON RD CROSS PLAINS, WI 535288863	N/A	PC	GENERAL SUPPORT	500
CROSS PLAINS LIONS CLUB INC 2501 CENTER ST CROSS PLAINS, WI 535289462	N/A	PC	GENERAL SUPPORT	1,000
DEFOREST HIGH SCHOOL 815 JEFFERSON ST DEFOREST, WI 535321322	N/A	PC	WEIGHT ROOM	2,000
DOMESTIC ABUSE INTERVENTION SERVICES INC 2102 FORDEM AVE MADISON, WI 537044610	N/A	PC	GENERAL SUPPORT	5,000
Total . . . . . ►				396,752
3a				

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				
EDGEWOOD HIGH SCHOOL OD THE SACRED HEART INC 2219 MONROE ST MADISON, WI 537111901	N/A	PC	GENERAL SUPPORT	5,000
EPILEPSY FOUNDATION HEART OF WISCONSIN INC 1302 MENDOTA ST STE 100 MADISON, WI 537141059	N/A	PC	GENERAL SUPPORT	500
FIRST LUTHERAN CHURCH 5313 FLAD AVE MADISON, WI 537113600	N/A	PC	GENERAL SUPPORT	2,000
FRIENDS OF HENRY VILAS ZOO 606 S RANDALL AVE MADISON, WI 537151666	N/A	PC	GENERAL SUPPORT	2,000
FRIENDS OF THE YAHARA HOUSE 625 W WASHINGTON AVE MADISON, WI 537032637	N/A	PC	GENERAL SUPPORT	500
GILDA'S CLUB OF MADISON WISCONSIN INC 7907 UW HEALTH CT MIDDLETON, WI 535625531	N/A	PC	GENERAL SUPPORT	5,000
HABITAT FOR HUMANITY OF DANE COUNTY INC 1014 FIEDLER LN UNIT 29 MADISON, WI 537132460	N/A	PC	GENERAL SUPPORT	5,000
HAWTHORNE ELEMENTARY SCHOOL 3344 CONCORD AVE MADISON, WI 537141101	N/A	PC	GENERAL SUPPORT	200
LUKE HOUSE INC 310 S INGERSOLL ST MADISON, WI 537033739	N/A	PC	GENERAL SUPPORT	3,000
MAD-CITY SKI TEAM INC 6516 MONONA DR MONONA, WI 537164026	N/A	PC	GENERAL SUPPORT	500
MADISON AREA TECHNICAL COLLEGE FOUNDATION INC 3591 ANDERSON ST STE 203A MADISON, WI 537042533	N/A	PC	GENERAL SUPPORT	5,000
MARCH OF DIMES FOUNDATION 1275 MAMARONECK AVE WHITE PLAINS, NY 106055201	N/A	PC	GENERAL SUPPORT	1,000
MIDDLETON BASEBALL & SOFTBALL COMMISSION PO BOX 620823 MIDDLETON, WI 535620823	N/A	PC	GENERAL SUPPORT	10,000
MIDDLETON CARDINAL BOOSTER CLUB 2100 BRISTOL ST MIDDLETON, WI 535622746	N/A	PC	GENERAL SUPPORT	1,225
MIDDLETON COMMUNITY POLICE PARTNERSHIP INC 7341 DONNA DR MIDDLETON, WI 535621735	N/A	PC	GENERAL SUPPORT	500
Total . . . . . ► 3a				396,752



Form 990FPF 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)				
<b>a</b> <i>Paid during the year</i>				
MIDDLETON OUTREACH MINISTRY INC 7432 HUBBARD AVE MIDDLETON, WI 535623118	N/A	PC	GENERAL SUPPORT	3,000
MIDDLETON SPEEDWAY BLUEBIRDS BASKETBALL 4227 REDTAIL PASS MIDDLETON, WI 535625203	N/A	PC	GENERAL SUPPORT	500
MOUNT HOREB AREA WRESTLING INC 721 S 2ND ST MOUNT HOREB, WI 535723314	N/A	PC	GENERAL SUPPORT	5,000
MOUNT HOREB HIGH SCHOOL 305 S 8TH ST MOUNT HOREB, WI 535722301	N/A	PC	HIGH SCHOOL WRESTLING	428
MOUNT HOREB HISTORICAL SOCIETY INC 100 S 2ND ST MOUNT HOREB, WI 535722106	N/A	PC	GENERAL SUPPORT	2,000
MOUNT HOREB SOFTBALL CLUB INC PO BOX 215 MOUNT HOREB, WI 535720215	N/A	PC	GENERAL SUPPORT	800
MOUNT HOREB VOLUNTEER FIRE DEPARTMENT AND EMERGENCY MEDICAL SERVICE 12 S 1ST ST MOUNT HOREB, WI 535721949	N/A	PC	GENERAL SUPPORT	500
MT HOREB LANDMARKS FOUNDATION INC 120 SANDY CT MOUNT HOREB, WI 535722344	N/A	PC	GENERAL SUPPORT	5,000
NEW GLARUS FIRE DEPARTMENT 212 4TH AVE NEW GLARUS, WI 535749717	N/A	PC	GENERAL SUPPORT	1,000
NORTHWEST DANE SENIOR SERVICES INC 1837 BOURBON RD CROSS PLAINS, WI 535289436	N/A	PC	GENERAL SUPPORT	10,000
RAWHIDE INC E7475 RAWHIDE RD NEW LONDON, WI 549619025	N/A	PC	GENERAL SUPPORT	1,000
ROMAN CATHOLIC DIOCESE OF MADISON INC 702 S HIGH POINT RD STE 225 MADISON, WI 537194926	N/A	PC	GENERAL SUPPORT	500
SECOND HARVEST OF WISCONSIN 726 N MIDVALE BLVD MADISON, WI 537053243	N/A	PC	GENERAL SUPPORT	1,000
SEGS4VETS 500 FOX RIDGE RD SAINT LOUIS, MO 631313402	N/A	PC	GENERAL SUPPORT	2,500
SOCIETY OF ST VINCENT DE PAUL 2033 FISH HATCHERY RD MADISON, WI 537131238	N/A	PC	GENERAL SUPPORT	4,000
<b>Total . . . . . ►</b> <b>3a</b>				396,752

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				
ST FRANCIS OF ASSISI MISSION 1355 FARNHAM ST PORTAGE DES SIOUX, MO 633731347	N/A	PC	GENERAL SUPPORT	3,000
ST FRANCIS XAVIER CATHOLIC CHURCH AND SCHOOL 2939 THINNES ST CROSS PLAINS, WI 535289540	N/A	PC	GENERAL SUPPORT	55,770
ST FRANCIS XAVIER CATHOLIC CHURCH AND SCHOOL ENDOWMENT 2939 THINNES ST CROSS PLAINS, WI 535289540	N/A	PC	CECIL MARTIN CAMP	500
ST JUDE CHILDREN'S RESEARCH HOSPITAL 501 SAINT JUDE PL MEMPHIS, TN 381051905	N/A	PC	GENERAL SUPPORT	3,000
ST MARIA GORETTI CATHOLIC PARISH 5313 FLAD AVE MADISON, WI 537113600	N/A	PC	GENERAL SUPPORT	13,478
ST MARIA GORETTI SCHOOL ENDOWMENT 5313 FLAD AVE MADISON, WI 537113600	N/A	PC	GENERAL SUPPORT	50,000
ST MARY'S CONGREGATION OF PINE BLUFF 3673 COUNTY ROAD P CROSS PLAINS, WI 535289179	N/A	PC	GENERAL SUPPORT	7,500
ST PAUL UNIVERSITY CATHOLIC CENTER 723 STATE ST MADISON, WI 537031048	N/A	PC	GENERAL SUPPORT	10,000
ST PETER CATHOLIC SCHOOL 7129 COUNTY ROAD K MIDDLETON, WI 535623912	N/A	PC	GENERAL SUPPORT	10,000
THE CHURCH 2833 RARITAN RD MADISON, WI 537115232	N/A	PC	GENERAL SUPPORT	6,000
THE DUGOUT CLUB INC 5002 MARATHON DR MADISON, WI 537054713	N/A	PC	GENERAL SUPPORT	1,450
THE MENDOTA GRIDIRON CLUB INC 1440 MONROE ST MADISON, WI 537112051	N/A	PC	GENERAL SUPPORT	7,440
THE MONROE CLINIC INC 515 22ND AVE MONROE, WI 535661569	N/A	PC	GENERAL SUPPORT	11,000
THE SCHOOL SISTERS OF ST FRANCIS OF ST JOSEPH'S CONVENT MILWAUKEE WISCO 1501 S LAYTON BLVD MILWAUKEE, WI 532151924	N/A	PC	GENERAL SUPPORT	5,300
THE WISCONSIN FFA FOUNDATION INC 1241 JOHN Q HAMMONS DR STE 200 MADISON, WI 537171929	N/A	PC	GENERAL SUPPORT	1,000
Total . . . . . ► 3a				396,752

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				
UNITED STATES OLYMPIC COMMITTEE 1 OLYMPIC PLZ COLORADO SPRINGS, CO 809095760	N/A	PC	GENERAL SUPPORT	1,000
UNIVERSITY OF WISCONSIN ATHLETIC DEPARTMENT 1440 MONROE ST MADISON, WI 537112051	N/A	PC	FOOTBALL PROGRAM	3,235
UNIVERSITY OF WISCONSIN ATHLETIC DEPARTMENT 1440 MONROE ST MADISON, IN 537112051	N/A	PC	BASKETBALL TEAM	7,440
UNIVERSITY OF WISCONSIN ATHLETIC DEPARTMENT 1440 MONROE ST MADISON, WI 537112051	N/A	PC	CREW TEAM	1,278
UNIVERSITY OF WISCONSIN ATHLETIC DEPARTMENT 1440 MONROE ST MADISON, WI 537112051	N/A	PC	WRESTLING AND HOCKEY TEAMS	4,437
UNIVERSITY OF WISCONSIN DEPARTMENT OF ANIMAL SCIENCES 1675 OBSERVATORY DR RM 265 MADISON, WI 537061205	N/A	PC	GENERAL SUPPORT	20,000
VALLEY OF OUR LADY MONASTERY E11096 YANKE DR PRAIRIE DU SAC, WI 535789737	N/A	PC	GENERAL SUPPORT	2,000
VETERANS OF FOREIGN WARS POST 8216 6710 CENTURY AVE MIDDLETON, WI 535621728	N/A	PC	GENERAL SUPPORT	13,000
WHITETAILS UNLIMITED INC 2100 MICHIGAN ST STURGEON BAY, WI 542353710	N/A	PC	GENERAL SUPPORT	500
WISCONSIN AMPUTEES 900 E HILL AVE STE 290 KNOXVILLE, TN 379152568	N/A	PC	GENERAL SUPPORT	1,500
WISCONSIN DIALYSIS CLINIC 3034 FISH HATCHERY RD FITCHBURG, WI 537133125	N/A	PC	GENERAL SUPPORT	1,000
WISCONSIN DISABLED AMERICAN VETERANS TRANSPORTATION NETWORK 130 DAUPHIN ST GREEN BAY, WI 543012110	N/A	PC	GENERAL SUPPORT	2,500
WISCONSIN HEIGHTS ATHLETICS 314 ANNE ST MAZOMANIE, WI 535609302	N/A	PC	GENERAL SUPPORT	500
WISCONSIN STATE JOURNAL YOUTH SERVICES INC 1901 FISH HATCHERY RD MADISON, WI 537131248	N/A	PC	EMPTY STOCKING CLUB	1,000
WISCONSIN WRESTLING 114 8TH CT RACINE, WI 534039443	N/A	PC	GENERAL SUPPORT	2,000
Total . . . . . ► 3a				396,752

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)				
<b>a</b> <i>Paid during the year</i>				
WOMEN'S CARE CENTER 3711 ORIN RD MADISON, WI 537043642	N/A	PC	GENERAL SUPPORT	1,000
WOUNDED WARRIOR PROJECT 4899 BELFORT RD STE 300 JACKSONVILLE, FL 322566033	N/A	PC	GENERAL SUPPORT	471
YOUNG AMERICAN'S FOUNDATION 11480 COMMERCE PARK DR FL 6 RESTON, VA 201911554	N/A	PC	GENERAL SUPPORT	1,000
YOUNG LIFE 1909 TYROL TER MOUNT HOREB, WI 535723628	N/A	PC	GENERAL SUPPORT	8,000
<b>Total . . . . . ▶</b> <b>3a</b>				396,752

**TY 2016 Accounting Fees Schedule****Name:** KALSCHEUR FAMILY FOUNDATION**EIN:** 39-6681490

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
ACCOUNTING FEES	1,500	750		750

**TY 2016 Investments Corporate Stock Schedule****Name:** KALSCHEUR FAMILY FOUNDATION**EIN:** 39-6681490

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
COMMON STOCK	3,439,326	4,801,692
MUTUAL FUNDS - EQUITY	2,360,501	2,711,083
MUTUAL FUNDS - INTERNATIONAL	1,988,469	2,616,061
FOREIGN EQUITIES	242,924	306,032

**TY 2016 Investments Government Obligations Schedule****Name:** KALSCHEUR FAMILY FOUNDATION**EIN:** 39-6681490**US Government Securities - End  
of Year Book Value:**

150,556

**US Government Securities - End  
of Year Fair Market Value:**

155,190

**State & Local Government  
Securities - End of Year Book  
Value:**

0

**State & Local Government  
Securities - End of Year Fair  
Market Value:**

0

**TY 2016 Other Professional Fees Schedule****Name:** KALSCHEUR FAMILY FOUNDATION**EIN:** 39-6681490

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
INVESTMENT MANAGEMENT FEES	41,014	41,014		0



**TY 2016 Taxes Schedule****Name:** KALSCHEUR FAMILY FOUNDATION**EIN:** 39-6681490

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	21,784	0		0
FOREIGN TAXES	2,888	2,888		0