

Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation**

Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning , 2019, and ending

Dean L. & Rosemarie Buntrock Foundation
Oakbrook Terrace Tower, One Twr Ln #2242
Oakbrook Terrace, IL 60181

A Employer identification number
36-3001925

B Telephone number (see instructions)
630-954-4204

C If exemption application is pending, check here ☐ 6

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 ☐

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 04
☐ 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, column (c), line 16)
\$ 887,572.
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))

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

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

131.

131.

N/A

4 Dividends and interest from securities

2,245.

2,245.

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

527,843.

b Gross sales price for all assets on line 6a 551,293.

7 Capital gain net income (from Part IV, line 2)

527,843.

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)

See Statement 1

-945.

12 Total. Add lines 1 through 11

529,274.

530,219.

13 Compensation of officers, directors, trustees, etc

0.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule)

b Accounting fees (attach sch)

c Other professional fees (attach sch)

17 Interest

18 Taxes (attach schedule)(see instrs). See Stm 2

4,144.

19 Depreciation (attach schedule) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

See Statement 3

413.

24 Total operating and administrative expenses. Add lines 13 through 23

4,557.

25 Contributions, gifts, grants paid Part XV

219,145.

219,145.

Total expenses and disbursements

Add lines 24 and 25

223,702.

0.

219,145.

Subtract line 26 from line 12

a Excess of revenue over expenses and disbursements

305,572.

b Net investment income (if negative, enter -0-)

530,219.

c Adjusted net income (if negative, enter -0-)

Part II Balance Sheets		Beginning of year (a) Book Value	End of year	
			(b) Book Value	(c) Fair Market Value
Assets	1 Cash — non-interest-bearing	87,248.	66,118.	66,118.
	2 Savings and temporary cash investments	14,243.	432,720.	432,720.
	3 Accounts receivable	24,098.		
	Less allowance for doubtful accounts			
	4 Pledges receivable	24,098.	24,098.	24,098.
	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 sch)			
	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)			
	b Investments — corporate stock (attach schedule)	542,850.		
	c Investments — corporate bonds (attach schedule)			
Liabilities	11 Investments — land, buildings, and equipment basis			
	Less accumulated depreciation (attach schedule)			
	12 Investments — mortgage loans			
	13 Investments — other (attach schedule)	365,581.	364,636.	364,636.
	14 Land, buildings, and equipment basis			
	Less accumulated depreciation (attach schedule)			
	15 Other assets (describe)	67,380.		
	16 Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)	1,101,400.	887,572.	887,572.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & 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 FASB ASC 958, check here and complete lines 24, 25, 29, and 30. <input type="checkbox"/>			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30. <input checked="" type="checkbox"/>			
	26 Capital stock, trust principal, or current funds	1,101,400.	887,572.	
	27 Paid-in or capital surplus, or land, bldg, and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
	29 Total net assets or fund balances (see instructions)	1,101,400.	887,572.	
	30 Total liabilities and net assets/fund balances (see instructions)	1,101,400.	887,572.	

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 29 (must agree with end-of-year figure reported on prior year's return)	1	1,101,400.
2 Enter amount from Part I, line 27a	2	305,572.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	1,406,972.
5 Decreases not included in line 2 (itemize) See Statement 4	5	519,400.
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 29	6	887,572.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P — Purchase D — Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1 a 7000 Common Shares LKO	D	7/13/05	4/18/19
b 10500 Common Shares LKO	D	7/13/05	9/17/19
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a 215,675.		9,380.	206,295.
b 335,618.		14,070.	321,548.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			206,295.
b			321,548.
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	2	527,843.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 8, column (c) See instructions. If (loss), enter -0- in Part I, line 8 </div>	3	0.

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 doesn't qualify under section 4940(e). Do not complete this part.

(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))
2018	188,671.	1,258,913.	0.149868
2017	116,494.	1,387,519.	0.083958
2016	217,325.	762,711.	0.284938
2015	428,036.	879,750.	0.486543
2014	283,028.	816,638.	0.346577

2 Total of line 1, column (d)	2	1.351884
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years.	3	0.270377
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	1,051,486.
5 Multiply line 4 by line 3	5	284,298.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	5,302.
7 Add lines 5 and 6	7	289,600.
8 Enter qualifying distributions from Part XII, line 4	8	219,145.

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)

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1 Date of ruling or determination letter. _____ (attach copy of letter if necessary – see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	10,604.
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	10,604.
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	10,604.
6 Credits/Payments		
a 2019 estimated tax pymts and 2018 overpayment credited to 2019	6 a	
b Exempt foreign organizations – tax withheld at source	6 b	
c Tax paid with application for extension of time to file (Form 8868)	6 c	
d Backup withholding erroneously withheld	6 d	
7 Total credits and payments. Add lines 6a through 6d	7	0.
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	129.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	10,733.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11 Enter the amount of line 10 to be. Credited to 2020 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

Part VII-A Statements Regarding Activities

	Yes	No
1 a 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the 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		X
c Did the foundation file Form 1120-POL for this year?		X
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		X
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		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by <i>General Instruction T</i>		X
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?		X
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	X	
8 a Enter the states to which the foundation reports or with which it is registered. See instructions IL		
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 <i>General Instruction G</i> ? If 'No,' attach explanation	X	
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 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If 'Yes,' complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
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	X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement See instructions	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>N/A</u>	13	X
14 The books are in care of <u>Donovan A. Langford</u> Telephone no <u>630-954-4204</u> Located at <u>Oakbrook Terrace Tower, One Twr Ln Oakbrook</u> ZIP + 4 <u>60181</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — check here and enter the amount of tax-exempt interest received or accrued during the year <u>N/A</u>	15	N/A
16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country		

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

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

	Yes	No
1 a During the year, did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is 'Yes' to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>	1 b	N/A
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 2019?	1 c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years <u>20</u> , <u>20</u> , <u>20</u> , <u>20</u>		
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.)	2 b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20</u> , <u>20</u> , <u>20</u> , <u>20</u>		
3 a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If 'Yes,' did it have excess business holdings in 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4 b	X

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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** N/A

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?N/A ☐ 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** X

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?N/A **7b****8** Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?☐ Yes ☒ No**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, and foundation managers and their compensation. See instructions.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Dean L. Buntrock One Tower Lane #2242 Oakbrook Terrace, IL 60181	Director 0	0.	0.	0.
Rosemarie Buntrock One Tower Lane #2242 Oakbrook Terrace, IL 60181	Director 0	0.	0.	0.
Donovan A. Langford III One Tower Lane #2242 Oakbrook Terrace, IL 60181	Treasurer 0	0.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
None				

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

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services. See instructions. If none, enter 'NONE.'**

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	0.

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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	1 a	403,953.
b	Average of monthly cash balances	1 b	240,648.
c	Fair market value of all other assets (see instructions)	1 c	422,897.
d	Total (add lines 1a, b, and c)	1 d	1,067,498.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1 e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,067,498.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	16,012.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,051,486.
6	Minimum investment return. Enter 5% of line 5	6	52,574.

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	52,574.
2 a	Tax on investment income for 2019 from Part VI, line 5	2 a	10,604.
b	Income tax for 2019 (This does not include the tax from Part VI.)	2 b	
c	Add lines 2a and 2b	2 c	10,604.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	41,970.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	41,970.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	41,970.

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	1 a	219,145.
b	Program-related investments — total from Part IX-B	1 b	
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)	3 a	
b	Cash distribution test (attach the required schedule)	3 b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	219,145.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	219,145.

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 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				41,970.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			0.	
b Total for prior years 20 __, 20 __, 20 __		0.		
3 Excess distributions carryover, if any, to 2019				
a From 2014	245,051.			
b From 2015	384,792.			
c From 2016	183,958.			
d From 2017	49,086.			
e From 2018	129,803.			
f Total of lines 3a through e	992,690.			
4 Qualifying distributions for 2019 from Part XII, line 4 ▶ \$ 219,145.				
a Applied to 2018, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2019 distributable amount				41,970.
e Remaining amount distributed out of corpus	177,175.			
5 Excess distributions carryover applied to 2019 (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	1,169,865.			
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 2018 Subtract line 4a from line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020				0.
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 2014 not applied on line 5 or line 7 (see instructions)	245,051.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	924,814.			
10 Analysis of line 9				
a Excess from 2015	384,792.			
b Excess from 2016	183,958.			
c Excess from 2017	49,086.			
d Excess from 2018	129,803.			
e Excess from 2019	177,175.			

BAA

Form 990-PF (2019)

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

N/A

- 1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling ▶
- b** Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

- 2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

b 85% of line 2a

c Qualifying distributions from Part XII,
line 4, for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities.

e Qualifying distributions made directly for active conduct of exempt activities
Subtract line 2d from line 2c

- 3** Complete 3a, b, or c for the alternative test relied upon

a 'Assets' alternative test – enter

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed

c 'Support' alternative test – enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

[illegible]

Part XVI **Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year – see instructions.)**

1 Information Regarding Foundation Managers:

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

See Statement 5

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

None

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

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

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

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

- c Any submission deadlines

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

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year See Statement 6				
Total			3 a	219,145.
b Approved for future payment				
Total			3 b	

Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions to verify calculations)

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

Dean L. & Rosemarie Buntrock Foundation

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Statement 5
Form 990-PF, Part XV, Line 1a
Foundation Managers - 2% or More Contributors

Dean L. Buntrock
 Rosemarie Buntrock

Statement 6
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Art Institute of Chicago 111 South Michigan Ave Chicago IL 60603	None	Public	General Museum Support	\$ 2,000.
Asian Art Museum 200 Larkin Street San Francisco CA 94102	None	Public	General Museum Support	500.
Barbara Sinatra Children's Center 39000 Bob Hope Drive Rancho Mirage CA 92270	None	Public	Support counseling and prevent child abuse	2,500.
Casa Central 1343 North California Ave Chicago IL 60622	None	Public	Support the Hispanic community's social service agency	500.
Chicago Foundation for Women One East Wacker Drive Chicago IL 60601	None	Public	Services to Chicago women and girls	500.
Chicago Architecture Foundation 224 South Michigan Ave Chicago IL 60604	None	Public	General operating support	1,000.
Chicago Symphony Orchestra 220 South Michigan Ave Chicago IL 60604	None	Public	General symphony operating support	3,000.
Coachella Valley Rescue Mission 47518 Van Buren St Indio CA 92202	None	Public	Feed the hungry in Coachella Valley	2,250.

Dean L. & Rosemarie Buntrock Foundation

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Statement 6 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Community House Hinsdale 415 W. 8th Street Hinsdale IL 60521	None	Public	Counseling services, programs for low income residents, and recreation for people of all ages	\$ 1,500.
Crohn's & Colitis Foundation of America 386 Park Avenue South, 17th Floor New York NY 10016	None	Public	Research into Crohn's disease	1,000.
DuPage Children's Museum 301 N. Washington Street Naperville IL 60540	None	Public	Children's programs	1,000.
Evans Scholars Foundation 1 Briar Road Golf IL 60029	None	Public	Scholarships	1,000.
The Field Museum 1400 S. Lake Shore Drive Chicago IL 60605	None	Public	Support the campaign for The Field Museum	1,000.
Geneva Lake Association P.O. Box 412 Lake Geneva WI 53147	None	Public	Conservation and education in the Geneva Lake Area	350.
Geneva Lake Conservancy P.O. Box 588 Fontana WI 53125	None	Public	Protect and support use of Geneva Lake	2,000.
Geneva Lake Water Safety P.O. Box 548 Williams Bay WI 53191	None	Public	General operating support	1,000.
Goodman Theatre 170 North Dearborn Chicago IL 60601	None	Public	Promote theatre and education programs	2,500.
Grau Mill and Museum 3800 York Road Oak Brook IL	None	Public	General museum operations	250.
Guideposts Foundation 66 East Main Street Pawling NY 12564	None	Public	Outreach ministry	500.

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Statement 6 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Harris Theatre 205 East Randolph Drive Chicago IL 60601	None	Public	General theatre support	\$ 1,000.
Holiday Home Camp P.O. Box 10 Williams Bay WI 53191	None	Public	Provide camping experiences for at-risk children	1,000.
Hope Lutheran Church 45900 Portola Palm Desert CA 92260	None	Public	General church operations	50,000.
Juvenile Diabetes Research Foundation 28 Kennedy Blvd, Suite 180 East Brunswick NJ 08816	None	Public	Research into juvenile diabetes	500.
Junior Achievement of Chicago 651 West Washington Street Chicago IL 60661	None	Public	General operating support	1,000.
Little Sisters of the Poor 2325 North Lakewood Ave Chicago IL 60614	None	Public	General operating support	2,500.
The Living Desert 47900 Portola Ave Palm Desert CA 92260	None	Public	Desert conservation through preservation, education, and appreciation	3,500.
Mayo Clinic 200 First Street SW Rochester MN 55905	None	Public	Medical education	500.
Memorial Sloan-Kettering Cancer Center 633 Third Avenue, 28th Floor New York NY 10017	None	Public	Support cancer center	3,000.
Metropolitan Museum of Art 1000 Fifth Avenue New York NY 10028	None	Public	General museum support	250.
Museum of Science and Industry 57th Street and Lake Shore Drive Chicago IL 60637	None	Public	General museum support	1,000.

Dean L. & Rosemarie Buntrock Foundation

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Statement 6 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Basilica of the National Shrine 400 Michigan Avenue NE Washington DC 20017	None	Public	General operating support	\$ 3,175.
Old St. Patrick's Church 700 W. Adams Street Chicago IL 60661	None	Public	General operating support	1,000.
Openlands Project 25 E. Washington Street Chicago IL 60602	None	Public	Protect midwestern natural resources	500.
Rush University Medical Center 1725 West Harrison St Chicago IL 60612	None	Public	General medical center support	5,000.
Salt Creek Ballet 98 East Chicago Ave Westmont IL 60559	None	Public	General operating support	500.
Smiles N2666 County Road K Darien WI 53114	None	Public	To help individuals with disabilities	500.
St. Olaf College 1520 St. Olaf Avenue Northfield MN 55057	None	Public	Buntrock Commons Foundation Maintenance	70,380.
Catholic Church Extension Society 150 S. Wacker Drive Chicago IL 60606	None	Public	To support under resourced or isolated diocese	4,500.
Chicago Zoological Society Brookfield IL 60513	None	Public	Inspire conservation leadership	1,000.
Misericordia Women's Board 6300 Ridge Avenue Chicago IL 60660	None	Public	Support of individuals with developmental and physical disabilities	1,000.
Newberry Library 60 West Walton St Chicago IL 60610	None	Public	General Support	1,000.

Dean L. & Rosemarie Buntrock Foundation

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Statement 6 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
The Night Ministry 4711 North Ravenswood Chicago IL 60640	None	Public	Support the homeless	\$ 500.
MD Anderson Cancer Center P.O. Box301439 Houston TX 77230	None	Public	To support research and patient care efforts aimed at cancer	1,000.
Boys and Girls Club of Chicago 4835 N. Sheridan Road Chicago IL 60640	None	Public	To support the organization's mission to enable all young people to reach their full potential	1,000.
Geneva Lake West Chamber of Commerce PO Box 118 Fontana WI 53125	None	Public	To support the city's fireworks display	1,000.
Joslin Diabetes Center One Joslin Place Boston MA 02215	None	Public	To support diabetes research	5,000.
Marine Corps Scholarship Fund 205 West Wacker Drive Chicago IL 60606	None	Public	Provide sholarships for children of Marines and Navy Corpsmen	1,000.
Mercy Home Boys and Girls 1140 W. Jackson Blvd Chicago IL 60607	None	Public	Support neglected and abandoned children in Chicago	500.
United States Holocaust Memorial Museum 1000 Raoul Wallenberg Place SW Washington DC 20024	None	Public	For general support of the United States Holocaust Memorial Museum	1,000.
Peggy Notebaert Nature Museum 2430 N. Cannon Drive Chicago IL 60614	None	Public	Support of museums, exhibits, conservation & research	500.

Dean L. & Rosemarie Buntrock Foundation

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Statement 6 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Maryknoll Fathers and Brothers PO Box 302 Maryknoll NY 10545	None	Public	Keep Christ in Christmas	\$ 500.
Environmental Education Fdn PO Box 244 Fontana WI 53125	None	Public	Scholarship programs and environmental outreach	850.
Washington National Cathedral Massachusetts and Wisconsin Ave NW Washington DC 20016	None	Public	Sustain the National Cathedral	800.
American Horticultural Society 7931 East Boulevard Drive Alexandria VA 22308	None	Public	General operations	1,150.
Geneva Area Foundation 330 Broad Street Lake Geneva WI 53147	None	Public	Support of Horticultural Hall	500.
Geneva Lake Museum 255 Mill Street Lake Geneva WI 53147	None	Public	Provides support of Geneva Lake history	100.
Merit School of Music 38 South Peoria Street Chicago IL 60607	None	Public	Giving children the opportunity to grow through music	1,000.
Neue Galerie 1048 Fifth Ave New York NY 10028	None	PC	Museum for German and Austrian art	1,000.
Wildlife in Need Center W349 S1480 S. Waterville Road Oconomowoc WI 53066	None	Public	Care of over 2500 wild animals	500.
Boys & Girls Clubs of Coachella Valley 42-600 Cook St, Suite 120 Palm Desert CA 92211	None	PC	Provide safe supervised places to participate in activities to reach their potential	1,000.

Dean L. & Rosemarie Buntrock Foundation

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Statement 6 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Franciscan Friars of Atonement PO Box 301 Garrison NY 10524	None	PC	General Church Support	\$ 100.
Institute for Humane Studies 3434 Washington Blve Arlington VA 22201	None	PC	Education support	2,500.
Lake Geneva Fresh Air Association 361 N. Lake Shore Dr P.O. Box10 Williams Bay WI 53191	None	PC	Outdoor experience for children	2,500.
The Leadership Institute 1101 North Highland St Arlington VA 22201	None	PC	Train conservative students	1,000.
Grant Park Orchestral Assn 200 East Randolph St Chicago IL 60601	None	PC	Organizational support through awards benefit sponsorship	500.
Geneva Lake Environmental 350 Constance Bld Williams Bay WI 53191	None	PC	Assist in maintaining Geneva Lake	500.
Arbor Day Foundation 100 Arbor Ave Nebraska City NE 68410	None	PC	Organizational support	50.
Lake Geneva Beautification W3505 Snake Road Lake Geneva WI 53184	None	PC	Support the beautification of the city of Lake Geneva	500.
Music Institute of Chicago 1702 Sherman Ave Evanston IL 60201	None	PC	General operating support of music education	500.
Rancho Mirage Library and Observation Fd 71-100 Highway 111 Rancho Mirage CA 92270	None	PC	General library operating support	500.
Shirley Ryan Ability Lab 355 E Erie St Chicago IL 60691	None	PC	General research hospital operations	1,500.

Dean L. & Rosemarie Buntrock Foundation

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Statement 6 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

Name and Address	Donee Relationship	Found- ation Status	Purpose of Grant	Amount
St. Jude's Children's Hospital 262 Danny Thomas Place Memphis TN 38105	None	PC	General support of the Children's hospital	\$ 500.
Black Point Estate & Gardens W2470 Southland Road Lake Geneva WI 53147	None	PC	Historic Community Resource	150.
Children's Diabetes Fdtn 4380 S. Syracuse St Denver CO 80237	None	PC	Support Diabetes Research	500.
Doctors without Borders USA 40 Rector St New York NY 10006	None	PC	General support	200.
National Sep 11 Memorial 200 Liberty St New York NY 10281	None	PC	General support of the memorial and museum	1,000.
National Park Fdtn 1110 Vermont Ave Washington DC 20005	None	PC	General support of our national parks	35.
PBS So. California PO Box 33816 Los Angeles CA 90033	None	PC	General support of public broadcasting	55.
The Girlfriend Factor 77-734 Country Club Dr Palm Desert CA 92211	None	PC	Education support for adult women	500.
Turning Point USA 4940 E Beverly Rd Phoenix AZ 85044	None	PC	Identify, educate, train, and organize students to promote freedom	10,000.
Total				\$ <u>219,145.</u>

Dean L. & Rosemarie Buntrock Foundation

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Statement 1
Form 990-PF, Part I, Line 11
Other Income

	(a) Revenue per Books	(b) Net Investment Income	(c) Adjusted Net Income
Galena & 47	\$ 70.		
MPLIV20	-1,015.		
Total	<u>\$ -945.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

Statement 2
Form 990-PF, Part I, Line 18
Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
United States Treasury	\$ 4,144.			
Total	<u>\$ 4,144.</u>	<u>\$ 0.</u>	<u></u>	<u>\$ 0.</u>

Statement 3
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Illinois Annual Report	\$ 25.			
Misc	99.			
Other	16.			
Tax Software Costs	98.			
UBS Fees	175.			
Total	<u>\$ 413.</u>	<u>\$ 0.</u>	<u></u>	<u>\$ 0.</u>

Statement 4
Form 990-PF, Part III, Line 5
Other Decreases

Net Unrealized Gains or Losses on Investments		
Total	<u>\$ 519,400.</u>	<u>\$ 519,400.</u>