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Return of Private Foundation

or Section 4947(a)(1) Nonexempt Charitable Trust

Treated as a Private Foundation

2010

Department of the Treasury
Internal Revenue Service

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

For calendar year 2010, or tax year beginning , and ending

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Name of foundation THE STIMSON-MILLER FOUNDATION		A Employer identification number 93-1280388
Number and street (or P.O. box number if mail is not delivered to street address) P.O. BOX 82025	Room/suite	B Telephone number (503) 478-1501
City or town, state, and ZIP code PORTLAND, OR 97282		C If exemption application is pending, check here ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 3,582,938.	J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify)	E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
(Part I, column (d) must be on cash basis)		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))		(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				N/A	
2 Check ☒ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		165.	165.		STATEMENT 1
4 Dividends and interest from securities		77,922.	77,922.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		154,627.			
b Gross sales price for all assets on line 6a		2,013,406.			
7 Capital gain net income (from Part IV, line 2)			154,627.		
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)					
11 Other income					
12 Total. Add lines 1 through 11		232,714.	232,714.		
13 Compensation of officers, directors, trustees, etc		14,713.	1,471.		13,242.
14 Other employee salaries and wages		3,787.	379.		3,408.
15 Pension plans, employee benefits		1,786.	179.		1,607.
16a Legal fees STMT 3		6,315.	631.		5,684.
b Accounting fees STMT 4		8,725.	1,309.		7,416.
c Other professional fees STMT 5		28,444.	27,921.		523.
17 Interest					
18 Taxes STMT 6		5,704.	104.		588.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 7		1,573.	310.		1,263.
24 Total operating and administrative expenses. Add lines 13 through 23		71,047.	32,304.		33,731.
25 Contributions, gifts, grants paid		150,200.			150,200.
26 Total expenses and disbursements. Add lines 24 and 25		221,247.	32,304.		183,931.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		11,467.			
b Net investment income (if negative, enter -0-)			200,410.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash - non-interest-bearing			184,838.	568,286.	568,286.
	2 Savings and temporary cash investments				199,517.	199,517.
	3 Accounts receivable ▶					
	Less: allowance for doubtful accounts ▶			4,491.		
	4 Pledges receivable ▶					
	Less: allowance for doubtful accounts ▶					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons					
	7 Other notes and loans receivable ▶					
	Less: allowance for doubtful accounts ▶					
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges			708.	393.	393.
	10a Investments - U.S. and state government obligations					
	b Investments - corporate stock STMT 8			1,117,559.	1,142,625.	1,142,625.
	c Investments - corporate bonds STMT 9			2,229,648.	1,672,117.	1,672,117.
11 Investments - land, buildings, and equipment: basis ▶						
Less: accumulated depreciation ▶						
12 Investments - mortgage loans						
13 Investments - other						
14 Land, buildings, and equipment: basis ▶						
Less: accumulated depreciation ▶						
15 Other assets (describe ▶)						
16 Total assets (to be completed by all filers)			3,537,244.	3,582,938.	3,582,938.	
Liabilities	17 Accounts payable and accrued expenses			2,135.	2,527.	
	18 Grants payable					
	19 Deferred revenue					
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable					
	22 Other liabilities (describe ▶ STATEMENT 10)			1,265.	5,721.	
23 Total liabilities (add lines 17 through 22)			3,400.	8,248.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.					
	24 Unrestricted			3,533,844.	3,574,690.	
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.					
	27 Capital stock, trust principal, or current funds					
	28 Paid-in or capital surplus, or land, bldg., and equipment fund					
	29 Retained earnings, accumulated income, endowment, or other funds					
	30 Total net assets or fund balances			3,533,844.	3,574,690.	
31 Total liabilities and net assets/fund balances			3,537,244.	3,582,938.		

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	3,533,844.
2 Enter amount from Part I, line 27a	2	11,467.
3 Other increases not included in line 2 (itemize) ▶ UNREALIZED GAIN ON INVESTMENTS	3	29,379.
4 Add lines 1, 2, and 3	4	3,574,690.
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	3,574,690.

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.)
1a PUBLICLY TRADED SECURITIES	P		
b PUBLICLY TRADED SECURITIES	P		
c CAPITAL GAINS DIVIDENDS			
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 1,911,227.		1,807,278.	103,949.
b 64,317.		51,501.	12,816.
c 37,862.			37,862.
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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	
a			103,949.
b			12,816.
c			37,862.
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	154,627.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	{ }	3	N/A

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))
2009	199,029.	3,296,598.	.060374
2008	169,060.	3,994,701.	.042321
2007	224,182.	4,572,685.	.049026
2006	192,860.	4,283,991.	.045019
2005	199,906.	4,035,636.	.049535

2 Total of line 1, column (d)	2	.246275
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.049255
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	3,568,885.
5 Multiply line 4 by line 3	5	175,785.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,004.
7 Add lines 5 and 6	7	177,789.
8 Enter qualifying distributions from Part XII, line 4	8	183,931.

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)

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	2,004.
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	2,004.
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	2,004.
6 Credits/Payments:			
a 2010 estimated tax payments and 2009 overpayment credited to 2010	6a	556.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	1,448.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	2,004.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
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 2011 estimated tax ☐ Refunded ☐	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c 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
4a 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?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		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	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ► OR		
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	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 2010 or the taxable year beginning in 2010 (see 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

Form 990-PF (2010)

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW.STIMSONMILLERFOUNDATION.ORG	13	X	
14	The books are in care of SARAH REYNOLDS Telephone no. (503) 478-1501 Located at P.O. BOX 82025, PORTLAND, OR ZIP+4 97282			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country	16	Yes	No
				X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here		X
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 2010?		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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? If "Yes," list the years	☐ Yes ☒ No	
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.)	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. _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 2010 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 2010.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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 2010?		X

Form 990-PF (2010)

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 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ 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)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

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

6b

X

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

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

7b

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(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
SEE STATEMENT 11		14,713.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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

Form 990-PF (2010)

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. 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

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.

Form 990-PF (2010)

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a Average monthly fair market value of securities	1a	3,484,915.
b Average of monthly cash balances	1b	138,319.
c Fair market value of all other assets	1c	
d Total (add lines 1a, b, and c)	1d	3,623,234.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	3,623,234.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	54,349.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,568,885.
6 Minimum investment return. Enter 5% of line 5	6	178,444.

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	178,444.
2a Tax on investment income for 2010 from Part VI, line 5	2a	2,004.
b Income tax for 2010. (This does not include the tax from Part VI)	2b	1,681.
c Add lines 2a and 2b	2c	3,685.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	174,759.
4 Recoveries of amounts treated as qualifying distributions	4	0.
5 Add lines 3 and 4	5	174,759.
6 Deduction from distributable amount (see instructions)	6	0.
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	174,759.

Part XII Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	183,931.
b Program-related investments - total from Part IX-B	1b	0.
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the:		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	183,931.
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	5	2,004.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	181,927.

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 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				174,759.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			156,504.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005				
b From 2006				
c From 2007				
d From 2008				
e From 2009				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2010 from Part XII, line 4: ▶ \$ 183,931.				
a Applied to 2009, but not more than line 2a			156,504.	
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 2010 distributable amount				27,427.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2010 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2009. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2010. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				147,332.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2006				
b Excess from 2007				
c Excess from 2008				
d Excess from 2009				
e Excess from 2010				

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
CASH EQUIVALENT INTEREST	165.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	165.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
SECURITIES	77,922.	0.	77,922.
TOTAL TO FM 990-PF, PART I, LN 4	77,922.	0.	77,922.

FORM 990-PF LEGAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TONKON TORP, LLP, ATTORNEYS	6,315.	631.		5,684.
TO FM 990-PF, PG 1, LN 16A	6,315.	631.		5,684.

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
GARY MCGEE & CO. LLP, CPAS	8,725.	1,309.		7,416.
TO FORM 990-PF, PG 1, LN 16B	8,725.	1,309.		7,416.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
IT CONSULTANT	615.	92.		523.
ALLEN TRUST (INVEST. MGMT.)	27,829.	27,829.		0.
TO FORM 990-PF, PG 1, LN 16C	28,444.	27,921.		523.

FORM 990-PF	TAXES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
NOT FOR PROFIT CORPORATION TAX	692.	104.		588.
FEDERAL EXCISE TAX	2,591.	0.		0.
INCOME TAX	2,421.	0.		0.
TO FORM 990-PF, PG 1, LN 18	5,704.	104.		588.

FORM 990-PF	OTHER EXPENSES	STATEMENT	7
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
POSTAGE AND DELIVERY	122.	18.		104.
OTHER EXPENSES	1,344.	276.		1,068.
OFFICE SUPPLIES	107.	16.		91.
TO FORM 990-PF, PG 1, LN 23	1,573.	310.		1,263.

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
VARIOUS EQUITIES	477,237.	477,237.
VARIOUS EQUITY FUNDS	665,388.	665,388.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,142,625.	1,142,625.

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
VARIOUS FIXED INCOME	614,314.	614,314.
VARIOUS FIXED INCOME FUNDS	1,057,803.	1,057,803.
TOTAL TO FORM 990-PF, PART II, LINE 10C	1,672,117.	1,672,117.

FORM 990-PF	OTHER LIABILITIES	STATEMENT	10
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DESCRIPTION	BOY AMOUNT	EOY AMOUNT
DEFERRED FEDERAL EXCISE TAX PAYABLE	1,265.	1,852.
INCOME TAX PAYABLE CURRENTLY	0.	2,421.
FEDERAL EXCISE TAX PAYABLE CURRENTLY	0.	1,448.
TOTAL TO FORM 990-PF, PART II, LINE 22	1,265.	5,721.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 11

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
DENISE LILLEY P.O. BOX 82025 PORTLAND, OR 97282	PRESIDENT 4.00	0.	0.	0.
MARK T. GRAHAM P.O. BOX 82025 PORTLAND, OR 97282	VICE PRESIDENT 1.00	0.	0.	0.
GEORGE C. SPENCER P.O. BOX 82025 PORTLAND, OR 97282	SECRETARY 1.00	0.	0.	0.
SALLIE DUTTON P.O. BOX 82025 PORTLAND, OR 97282	DIRECTOR 1.00	0.	0.	0.
SETH EVANS P.O. BOX 82025 PORTLAND, OR 97282	DIRECTOR 1.00	0.	0.	0.
A. JANE GRAHAM P.O. BOX 82025 PORTLAND, OR 97282	DIRECTOR 1.00	0.	0.	0.
DEBI MUCHOW P.O. BOX 82025 PORTLAND, OR 97282	DIRECTOR 1.00	0.	0.	0.
SARAH REYNOLDS P.O. BOX 82025 PORTLAND, OR 97282	EXECUTIVE DIRECTOR 6.00	14,713.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		14,713.	0.	0.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
PAID DURING THE YEAR

STATEMENT 12

RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
AFRICAN AMERICAN HEALTH COALITION 2800 N. VANCOUVER, SUITE 100 PORTLAND, OR 97227	NONE PROGRAM SUPPORT	509(A)(1)	10,000.
BIG BROTHERS BIG SISTERS COLUMBIA NORTHWEST 1827 N.E. 44TH AVENUE, SUITE 100 PORTLAND, OR 97213	NONE PROGRAM SUPPORT	509(A)(1)	10,000.
BODYVOX 1201 N.W. 17TH AVENUE PORTLAND, OR 97209	NONE PROGRAM SUPPORT	509(A)(2)	20,000.
CAMP FIRE USA PORTLAND METRO COUNCIL 619 S.W. 11TH AVENUE PORTLAND, OR 97205	NONE PROGRAM SUPPORT	509(A)(1)	10,000.
CASA FOR CHILDREN 1401 N.E. 68TH AVENUE PORTLAND, OR 97213	NONE PROGRAM SUPPORT	509(A)(1)	10,000.
CHILDREN'S CANCER ASSOCIATION 433 N.W. 4TH AVENUE, SUITE 100 PORTLAND, OR 97209	NONE PROGRAM SUPPORT	509(A)(1)	5,000.
CHILDREN'S HEALING ART PROJECT 25 N.W. 23RD AVENUE, SUITE 6 PORTLAND, OR 97210	NONE PROGRAM SUPPORT	509(A)(2)	5,200.
INCIGHT COMPANY 310 S.W. FOURTH AVENUE, SUITE 530 PORTLAND, OR 97204	NONE PROGRAM SUPPORT	509(A)(1)	5,000.

THE STIMSON-MILLER FOUNDATION

93-1280388

LISTEN TO KIDS 5135 N.W. SAINT HELENS ROAD PORTLAND, OR 97210	NONE PROGRAM SUPPORT	509(A)(1)	7,500.
OREGON HEALTH AND SCIENCE UNIVERSITY FOUNDATION 3181 S.W. SAM JACKSON PARK ROAD PORTLAND, OR 97239	NONE PROGRAM SUPPORT	509(A)(1)	20,000.
PORTLAND HOUSING CENTER 3233 N.E. SANDY BOULEVARD PORTLAND, OR 97232	NONE PROGRAM SUPPORT	509(A)(1)	10,000.
PORTLAND OPPORTUNITIES INDUSTRIALIZATION CENTER 717 N. KILLINGSWORTH COURT PORTLAND, OR 97217	NONE PROGRAM SUPPORT	509(A)(1)	10,000.
SISTERS OF THE ROAD 133 N.W. 6TH AVENUE PORTLAND, OR 97209	NONE PROGRAM SUPPORT	509(A)(1)	7,500.
WESTERN RESOURCES LEGAL CENTER 5100 S.W. MACADAM, SUITE 350 PORTLAND, OR 97239	NONE PROGRAM SUPPORT	509(A)(2)	5,000.
YOUNG AUDIENCES OF OREGON & SW WASHINGTON 1220 S.W. MORRISON STREET, SUITE 900 PORTLAND, OR 97205	NONE PROGRAM SUPPORT	509(A)(1)	5,000.
YWCA OF GREATER PORTLAND 1111 S.W. 10TH AVENUE PORTLAND, OR 97205	NONE PROGRAM SUPPORT	509(A)(1)	10,000.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

150,200.



Stimson-Miller Foundation

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Mission Statement

It shall be the mission of the Foundation to carry on those particular civic, cultural, educational, health and human services, and other non-religious charitable purposes which are of primary interest and concern of the owners of Stimson Lumber Company, not only in the greater Portland area, but also in those communities throughout the United States where Stimson Lumber Company conducts its business and other areas where Company shareholders reside or have charitable-giving interests

General Funding Guidelines

Because there are so many deserving organizations serving our communities, if your organization received a grant last year, you will not be eligible this year

Eligible Organizations

Tax exempt organizations under Section 501(c)(3) recognized as being public charities (and not private foundations) under Section 509(a) of the Internal Revenue Code.

Geographic Emphasis

Stimson Lumber Company is headquartered in Portland, Oregon, with principal operations in Northwest Oregon, Eastern Washington, and Northern Idaho.

Organizations interested in receiving funds from The Stimson-Miller Foundation must be located within a 60 mile radius of Stimson Lumber Company operations in either Manufacturing or Resource Management. Please see the Stimson Lumber website at <http://www.stimsonlumber.com/Locations/locations.html> to verify whether your organization meets our geographic requirements prior to submitting an application

Please Note: While geographic location is the first step for determining eligibility, it is merely one of many criteria considered when deciding grant recipients

Funding Priorities

Civic, cultural, educational, health and human services, and religious organizations where the funding is not in furtherance of religious activities. The Foundation accepts grant requests, though priority is given to initiatives that originate with the owners of Stimson Lumber Company. Such shareholder-driven initiatives must meet the standards of funding priority and merit required of all grant requests approved. Preference is given to specific program support over general operational support and capital campaigns. The Foundation will generally not support endowment campaigns or traditionally taxpayer supported organizations or activities. Annual fund appeals are discouraged, even if the organization was recently successful in obtaining funding from the Foundation. The Foundation does not commonly make multi-year grants, and allows only one multi-year grant to be outstanding at any given time

Stimson Lumber Company has a substantial commitment to the education of children of employees through sponsorship and financial support of a formal scholarship program. As a consequence, the Foundation will not support grant requests related to scholarships, or other tuition assistance programs

The Foundation shall not support a charitable organization whose purpose in whole or in part is to oppose the legitimate activities of businesses operating in the forest products industry.



Stimson-Miller Foundation

[Home](#)[About Us](#)[Funding Guidelines](#)[How to Apply](#)[Past Recipients](#)

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2011 Application Process

All grant applications must be submitted via our online application process prior to May 13, 2011. The required supplemental information must be postmarked no later than May 13, 2011 to be considered. Grants submitted after 5/13/11 will not be considered, without exception

The online process is as follows:

- You enter the requested information on a form
- You review the information for accuracy
- If the information is incorrect in any way, you may edit it
- When you are satisfied that the information is correct, you continue to a confirmation
- Print the confirmation page and use it as a check list and cover sheet to submit the additional required documents (view checklist <<http://www.stimsonmillerfoundation.org/checklist.htm>>)
- An email will be sent to the project contact with confirmation information

The application schedule is as follows:

- Accept Online Grant Applications Commencing - April 1st
- Deadline for Submission of Grant Applications Materials - May 13th (Postmarked May 13th)
- Stimson-Miller Foundation Review Process - July through October
- All applicants will be notified of the Board's selection by the end of November

[Open The Application.](#)

**Application for Extension of Time To File an
Exempt Organization Return**

OMB No 1545-1709

► **File a separate application for each return.**

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only **Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*.

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed)

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only ☐*All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns*

Type or print	Name of exempt organization	Employer identification number
	THE STIMSON-MILLER FOUNDATION	93-1280388
	Number, street, and room or suite no. If a P.O. box, see instructions P.O. BOX 82025	
File by the due date for filing your return. See instructions	City, town or post office, state, and ZIP code. For a foreign address, see instructions PORTLAND, OR 97282	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

SARAH REYNOLDS

- The books are in the care of ►
- P.O. BOX 82025 - PORTLAND, OR 97282**

Telephone No. ► **(503) 478-1501**

FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for

- 1** I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **AUGUST 15, 2011**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☒ calendar year **2010** or
- ☐ tax year beginning _____, and ending _____

- 2** If the tax year entered in line 1 is for less than 12 months, check reason ☐ Initial return ☐ Final return
- ☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	2,004.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	556.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	1,448.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.**LHA For Paperwork Reduction Act Notice, see Instructions.**Form **8868** (Rev. 1-2011)