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Form 990-PF

Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

OMB No. 1545-0052

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2 8 ZUIZ	
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SC	

123501 12-02-11 LHA For Paperwork Reduction Act Notice, see instructions.

Department of the Treasury Internal Revenue Service For calendar year 2011 or tax year beginning , and ending Name of foundation A Employer identification number JEFFREY S AND HELEN H CARDON FOUNDATION 20-2029087 Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number 1663 DEVONSHIRE DRIVE 8015819333 City or town, state, and ZIP code C If exemption application is pending, check here SALT LAKE CITY. UT G Check all that apply: Initial return Initial return of a former public charity D 1. Foreign organizations, check here Final return Amended return Foreign organizations meeting the 85% test, 2, check here and attach computation Address change Name change X Section 501(c)(3) exempt private foundation Check type of organization: E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation under section 507(b)(1)(A), check here I Fair market value of all assets at end of year | J Accounting method: X Cash Accrual F If the foundation is in a 60-month termination (from Part II, col. (c), line 16) Other (specify) under section 507(b)(1)(B), check here 7, 137, 122. (Part I, column (d) must be on cash basis.) **▶**\$ Part | Analysis of Revenue and Expenses (a) Revenue and (c) Adjusted net (d) Disbursements (b) Net investment (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) for charitable purposes (cash basis only) expenses per books income income 1,500,000. Contributions, gifts, grants, etc., received 2 Check I if the foundation is not required to attach Sch 8 37,201. Interest on savings and temporary cash investments 37,201. STATEMENT 170,641. STATEMENT 170,641. 4 Dividends and interest from securities 5a Gross rents b Net rental income or (loss) <5,850.b 68 Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 150,807. 0. 7 Capital gain net income (from Part IV, line 2) N/A 8 Net short-term capital gain 9 Income modifications 10a Gross sales less returns b Less Cost of goods sold c Gross profit or (loss) 11 Other income 1.701.992. 207,842. 0. 12 Total. Add lines 1 through 11 Ō. 13 Compensation of officers, directors, trustees, etc. 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees Ō. STMT 3 1,370. 1,370 O. **b** Accounting fees STMT 4 656. 656. 0 0. c Other professional fees and Administrative 17 Interest STMT 5 76. 76. 0. 18 Taxes 0. 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses Operating 24 Total operating and administrative expenses Add-lines 13 through 23 Contributions, gifts, grants paid 2,102. 2,102. 0 229,550. 229,550. 25 26 Total expenses and disbursements Add lines 24 and 25 @ 2012 231,652. 2,102 0 229,550. Subtract line 26 from line 12: 1,470,340. 8 Excess of revenue over expenses and disbursement b Net investment income (if negative, enter 0-) 205,740. Ō. C Adjusted net income (if negative, enter -0-)

Page 2

JEFFREY S AND HELEN H CARDON FOUNDATION

	art	Balance Sheets Attached schedules and amounts in the description	Beginning of year	Ena of	
<u></u>	art	column should be for end-of year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	<46,419.>	1,413,137.	1,413,137.
	2	Savings and temporary cash investments			
		Accounts receivable ▶			
		Less: allowance for doubtful accounts			
	، ا	Pledges receivable			
	*				
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons	1		
	7	Other notes and loans receivable			
		Less: allowance for doubtful accounts			
(A	8	Inventories for sale or use			
Assets	· ·		· · · · · · · · · · · · · · · · · · ·	·-· · · · · · · · · · · · · · · · · · ·	
ASS		Prepaid expenses and deferred charges	1 060 721	904,064.	896,577.
•		Investments - U.S. and state government obligations STMT 6	1,060,721.		4 007 400
	Ь	Investments - corporate stock STMT 7	4,762,453.	4,929,894.	4,827,408.
	C	investments - corporate bonds			
	11	investments land, buildings, and equipment basis	i		
		Less accumulated depreciation			
	12	Investments - mortgage loans			
		Investments - other	1		
	ļ .	Land, buildings, and equipment basis			
	'	- · · · · · · 			
		Less accumulated depreciation			
	15	Other assets (describe			
			5 336 355	7 047 005	7 127 122
		Total assets (to be completed by all filers)	5,776,755.	7,247,095.	7,137,122.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
S	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
ē.	21	Mortgages and other notes payable			
ت	22	Other liabilities (describe)			
	22	Total Habilitian (add lines 17 through 22)	0.	0.	
_	23	Total liabilities (add lines 17 through 22) Foundations that follow SFAS 117, check here			
	ļ	•			
s	1	and complete lines 24 through 26 and lines 30 and 31.		- 045 005	
ances	24	Unrestricted	5,776,755.	7,247,095.	
	25	Temporarily restricted			
Net Assets or Fund Ba	26	Permanently restricted			
٦		Foundations that do not follow SFAS 117, check here			
Œ		and complete lines 27 through 31.			
δ	27	Capital stock, trust principal, or current funds			
ş		Paid-in or capital surplus, or land, bldg., and equipment fund			
\$S					
*	29	Retained earnings, accumulated income, endowment, or other funds	5,776,755.	7,247,095.	
ž	30	Total net assets or fund balances	3,170,733.	1,241,033.	
				7 045 005	
_	31	Total liabilities and net assets/fund balances	5,776,755.	7,247,095.	
Ē	art	Analysis of Changes in Net Assets or Fund Ba	alances		
느	u. t			<u>-</u> .	
1	Total	net assets or fund balances at beginning of year - Part II, column (a), line (30		
	(mus	t agree with end-of-year figure reported on prior year's return)		. [1]	5,776,755.
	•	amount from Part I, line 27a		2	1,470,340.
_		increases not included in line 2 (itemize)		3	0.
		ines 1, 2, and 3		4	7,247,095.
		eases not included in line 2 (itemize)	•	. 5	0.
			luma (h) line 20		7,247,095.
<u>6</u>	ıotal	net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	iumn (D), line 30		
					Form 990-PF (2011)

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.

241,366.

229,550.

7

8

7 Add lines 5 and 6

8 Enter qualifying distributions from Part XII, line 4

	n 990-PF (2011) JEFFREY S AND HELEN H CARDON FOUNDATION 20-20			Page 4
_	art VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - se	e instr	uctio	ns)
18	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)			
t	Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕨 🔲 and enter 1%		4,1	<u> 15.</u>
	of Part I, line 27b			
(: 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-)			0.
3	Add lines 1 and 2		4,1	15.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			0.
5	Tax based on Investment income. Subtract line 4 from line 3. If zero or less, enter -0-		4,1	15.
6	Credits/Payments:			
8	2011 estimated tax payments and 2010 overpayment credited to 2011 6a 6			
t	Exempt foreign organizations - tax withheld at source			
c	Tax paid with application for extension of time to file (Form 8868)			
•	Backup withholding erroneously withheld			
	Total credits and payments. Add lines 6a through 6d			0.
8		-		1.
	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		4.1	16.
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
	Enter the amount of line 10 to be: Credited to 2012 estimated tax		-	
	irt VII-A Statements Regarding Activities			
_	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in		Yes	No
	any political campaign?	1a	1	X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?	1b		X
_	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or	<u> </u>	-	
	distributed by the foundation in connection with the activities.	- i		
	Did the foundation file Form 1120-POL for this year?	10	1	x
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:		 	
Ť	(1) On the foundation. ► \$ 0 • (2) On foundation managers. ► \$ 0 •	- 1		
	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation		ļ	
Ť	managers. > \$ 0.	-	ĺ	
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		x
•	If "Yes," attach a detailed description of the activities.	├		
2	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or			
J	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		х
A s	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	48		X
	If "Yes," has it filed a tax return on Form 990-T for this year? N/A	4b	 	
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5	-	X
·	If "Yes," attach the statement required by General Instruction T.	<u> </u>		
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:		ļ	
·	By language in the governing instrument, or			ĺ
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law	ł		
	remain in the governing instrument?	6		х
7	Did the foundation have at least \$5,000 in assets at any time during the year?	7	Х	
′	If "Yes," complete Part II, col (c), and Part XV.	-	 ^	-
0 0	Enter the states to which the foundation reports or with which it is registered (see instructions)		1	1
Ja	UT	-]		
	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			х	
0	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar	00	 ^ -	
ð		_		¥
10	year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		X
<u> 10_</u>	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		

	990-PF (2011) JEFFREY S AND HELEN H CARDON FOUNDATION 20-202	<u>9087</u>		Page 5
Pa	art 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 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		х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
	Website address ► N/A	الخنا		L
14	The books are in care of ► HELEN H CARDON Telephone no. ►801-5	81-9	333	
	Located at ▶ 1663 S DEVONSHIRE DRIVE, SALT LAKE CITY, UT ZIP+4 ▶8			
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	N	/A	
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	16		Х
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign	·		
	country			
Pε	art 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
18	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?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person? Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1 1		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1 1		
	(5) Transfer any income or assets to a disqualified person (or make any of either available	1 1		
	for the benefit or use of a disqualified person)?	i i		
	(6) Agree to pay money or property to a government official? (Exception. Check "No"		- 1	
	if the foundation agreed to make a grant to or to employ the official for a period after	1 1		
	termination of government service, if terminating within 90 days.)	1 1	- 1	
b	of the any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations		- 1	
	section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	1b		
	Vigoritations for pring of a desiration regulating diseases absolute of the control of the contr			
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	1	i	
_	before the first day of the tax year beginning in 2011?	1c	\longrightarrow	<u> </u>
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)):			
а	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning			
	before 2011? Yes X No		J	
	If "Yes," list the years ▶	1 1	ŀ	
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	1 1	-	
	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach		ı	
	statement - see instructions.) N/A	2b		
C	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			
_	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time	1 1	- 1	
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes X No	1 1		
ь	If "Yes," did it have excess business holdings in 2011 as a result of (1) any purchase by the foundation or disqualified persons after	1 1	- 1	
	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	1 1		
	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,		ļ	
	Form 4720, to determine if the foundation had excess business holdings in 2011) N/A	3b	- 1	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	48		X
	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 jeneardy before the first day of the tax year beginning in 20112	1 46		X

Form 990-PF (20 Part VII-B	11) JEFFREY S AND HELEN H C Statements Regarding Activities for Which			20-2029 nued)	087	<u>Pa</u>	ge 6
	year did the foundation pay or incur any amount to:						—
(1) Carry o	n propaganda, or otherwise attempt to influence legislation (secti	ion 4945(e))?	Y	es 🗶 No			
	ce the outcome of any specific public election (see section 4955).	or to carry on, directly or indir	· —				
•	er registration drive?			es X No			
	a grant to an individual for travel, study, or other similar purposi		L Y	es X 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)?							
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?							
•	vention of cruelty to children or animals?	adar the eventions described		es LALINO			
	er is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify u 1945 or in a current notice regarding disaster assistance (see inst	•	in Regulations	N/A	5b		
	ns relying on a current notice regarding disaster assistance (see hist				30	-	—
	r is "Yes" to question 5a(4), does the foundation claim exemption		ined				
	responsibility for the grant?			es 🔲 No			
	tach the statement required by Regulations section 53.49		•/	···		1	
•	dation, during the year, receive any funds, directly or indirectly, t	1 - 7		ľ	1		
	enefit contract?	- p-, p	□ Y	es 🗶 No			
b Did the foun	dation, during the year, pay premiums, directly or indirectly, on a	personal benefit contract?			6b		X
	6b, file Form 8870.	•		Ì			
7a At any time	during the tax year, was the foundation a party to a prohibited tax	shelter transaction?		es X No			
b If "Yes," did	the foundation receive any proceeds or have any net income attri	butable to the transaction?		N/A	7b		_
Part VIII	Information About Officers, Directors, Trus Pald Employees, and Contractors		ınagers, Highl	у			
1 List all offic	ers, directors, trustees, foundation managers and thei	r 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) Expenscount, of allowance	ther
	CARDON	PRESIDENT/DIR	ECTOR				_
	ONSHIRE DRIVE				1		
	E CITY, UT 84108	0.00	0.	0	•		0.
	S CARDON	SECRETARY/TRE	ASURER/DI	RECT			
	ONSHIRE DRIVE			_			_
SALT LAK		0.00	0.	0	•		<u>0.</u>
JANE H M		DIRECTOR					
	BON PLACE			١ .			_
HAILEY,	ID 83333	0.00	0.	0	⊹		<u>0 .</u>
	· · · · · · · · · · · · · · · · · · ·	4	ŀ				
		4	1				
2 Compensati	on of five highest-paid employees (other than those in	cluded on line 1) If none	enter "NONE "		<u> </u>		
-		(b) Title, and average		(d) Contributions to	1	e) Expen	
(a) Nam	e and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	employee benefit plans and deferred	ač	count, ot illowance	her
NO	NE			compensation	+		<u> </u>
		7					
							_
		1					
							_
							_
		<u> </u>		_			
Total number of e	other employees paid over \$50,000			▶			╗

Form 990-PF (2011) JEFFREY S AND HELEN H CARDON FOUND		<u>-20290</u>)87 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundatio Paid Employees, and Contractors (continued)	n Managers, Highly		-
3 Five highest-paid independent contractors for professional services. If none, enter "N	ONE."		
(a) Name and address of each person paid more than \$50,000	(b) Type of service		(c) Compensation
NONE	(0) 1) 10 10 10 10 10 10 10 10 10 10 10 10 10		(0)
			
		İ	
	 		
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 i	nformation cuch as the	T	
number of organizations and other beneficiaries served, conferences convened, research papers produced	l, etc.	6	xpenses
1 N/A	·	 	
		1	
		1	0.
2		 	
		1	
	 	1	
3		 	
	 · · · · · · · · · · · · · · · · · 	1	
		1	
4			
		1	
]	
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.	1	Amount
1 N/A			
2]	
		}	
		<u> </u>	
All other program-related investments. See instructions.			
3			
]	
Total. Add lines 1 through 3	•		0.

P	Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations	, see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1 1a	6,060,657.
	Average of monthly cash balances	1b	111,302.
C	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	6,171,959.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0 .	1 1	
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	6,171,959.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	92,579.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	6,079,380.
6	Minimum investment return. Enter 5% of line 5	6	303,969.
P	Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations an foreign organizations check here and do not complete this part.)	d certain	,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
1	Minimum investment return from Part X, line 6	1]	303,969.
2a	·		
b			
C	· · · · · · · · · · · · · · · · · · ·	2c	4.115.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	4,115. 299,854.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	299,854.
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	299,854.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
8	Expenses, contributions, gifts, etc total from Part 1, column (d), line 26	1a	229,550.
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:		
	Suitability test (prior IRS approval required)	3a	
þ	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	229,550.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	229,550.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation q 4940(e) reduction of tax in those years.	ualifies foi	r the section

Part XIII Undistributed Income (see instructions)

1 Distributable amount for 2011 from Part XI, line 7 2 Undestributed income, if any, as of the end of 2011 a Enter amount for 2010 only b Total for prory years; 2009, 2008, 2007 3 Excess distributions carryover, if any, to 2011; a From 2006 b From 2009 e From 2010 1 Total of lines 3 a through e 4 Qualifying distributions for 2011 from Part XII, line 4: ► \$ 229,550. a Applete to 2010, but not more than line 2 b Applete for 2010, but not more than line 2 b Applete of 2011 distributable amount e Remaining amount distributed out of corpus (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) c Sease distributions acrowing englies to 2011 for a mount appears in column (ii) the section 494(2) but has been previously assessed a Corpus Add lines 31, 4c, and 4e Subtrect line 5 b Prior years' undistributed income of deficiency has been sueued, or on which the section 494(2) but has been previously assessed c Enter the amount of prior years' undistributed income for which a notice of deficiency has been sueued, or on which the section 494(2) but has been previously assessed c Enter the amount of prior years' undistributed income for 2010. Subtract line 4 form line 2a. Taxable amount - see instructions 1 Undistributed income for 2011. Subtract line 4 form line 2a. Taxable amount - see instructions 1 Undistributed income for 2011. Subtract line 4 form line 2a. Taxable amount - see instructions 1 Undistributed income for 2011. Subtract line 4 form line 2a. Taxable amount - see instructions		(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
Ine 7	1 Distributable amount for 2011 from Part XI	00.000	70075 57107 10 20 10	2010	2011
2 Underblucker become, I lary, and othe aced of 2011 a Enter amount for 200 only 1 or 10 o	·				299 854
a Enter amount for 2010 any birdeling received by Total for principal princi	- '				255,054.
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10 Analysis of line 9: a Excess from 2007 b Excess from 2008 c Excess from 2009 d Excess from 2010		0.]	
a Excess from 2007 b Excess from 2008 c Excess from 2009 d Excess from 2010	· •	***			
b Excess from 2008 c Excess from 2009 d Excess from 2010			ł		
c Excess from 2009 d Excess from 2010]	
d Excess from 2010	c Excess from 2009			ľ	
	 				
	e Excess from 2011				

Part XIV Private Operating	Y S AND HELE			20-20	29087 Page 1
				N/A	
1 a If the foundation has received a ruling foundation, and the ruling is effective to					
,	•	· ·	► L	40.42(1)(2) 05 40	40(.)(5)
b Check box to indicate whether the four	Tax year	ig louridation described	Prior 3 years	4942(j)(3) or49	42(1)(5)
2 a Enter the lesser of the adjusted net	(a) 2011	(b) 2010	(c) 2009	(d) 2008	(e) Total
income from Part I or the minimum	(4)2011	(0)2010	(0)2003	(0)2000	(0) 10121
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)		,	<u> </u>		
(2) Support from general public and 5 or more exempt			İ	1	
organizations as provided in					
section 4942(j)(3)(B)(iii)			 	 	
(3) Largest amount of support from					
an exempt organization (4) Gross investment income			 		
Part XV Supplementary Info	ormation (Comple	te this part only	if the foundation	had \$5 000 or mo	re in assets
at any time during			ii tiio iodiidatioi	111111111111111111111111111111111111111	10 111 000010
1 Information Regarding Foundati	on Managers:	i			
a List any managers of the foundation w	•	than 2% of the total con	tributions received by the	foundation before the clos	e of any tax
year (but only if they have contributed			•		•
NONE					
b List any managers of the foundation w other entity) of which the foundation h			(or an equally large porti	on of the ownership of a pa	rtnership or
NONE					
2 Information Regarding Contribu	tion, Grant, Gift, Loan,	Scholarship, etc., P	rograms:		
Check here ▶ ☐ If the foundation				not accept unsolicited reque	ests for funds. If
the foundation makes gifts, grants, etc	. (see instructions) to indiv	iduals or organizations	under other conditions, co	omplete items 2a, b, c, and	d
a The name, address, and telephone nur		n applications should be	addressed:		
HELEN H CARDON, 801			0.44.00		
1663 DEVONSHIRE DRIV					<u></u>
b The form in which applications should NONE SPECIFIED	De submitted and informat	ion and materials they s	nould include:		
c Any submission deadlines: NONE					-
d Any restrictions or limitations on award	is, such as by geographica	l areas, charitable fields	, kinds of institutions, or o	other factors:	
NONE	,	•			

Page 11

Part.XV Supplementary Information (continued) Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Foundation status of Purpose of grant or contribution show any relationship to **Amount** any foundation manager Name and address (home or business) recipient or substantial contributor a Paid during the year ALTA CLUB NONE CHARITABLE CONTRIBUTION 2,000. AMERICAN CANCER SOCIETY NONE CHARITABLE 11,800. CONTRIBUTION ASSISTANCE LEAGUE OF SALT LAKE NONE CHARITABLE CONTRIBUTION 1,000. BACK TO OUR ROOTS NONE CHARITABLE CONTRIBUTION 1,000. BOYS & GIRLS CLUB OF SALT LAKE CITY NONE CHARITABLE CONTRIBUTION 16,500. SEE CONTINUATION SHEET(S) Total 229,550. **▶** 3a b Approved for future payment NONE Total

Form 990-PF (2011) JEFFREY S A	ND HELEN H C	ARDON FOU	NDATIO	N 20-2	029087 Page 1
Part XVI-A Analysis of Income-P	Producing Activitie	S			
Enter gross amounts unless otherwise indicated.	Unrelated b	usiness income		y section 512, 513, or 514	(e)
9	(a)	(b)	(C) Exclu-	(d)	Related or exempt
1 Program service revenue:	Business code	Amount	sion code	Amount	function income
8		······································	+ +		
• - 			+	-	
•				- -	
	— 		+-+		*
0		**	+ + -		
e			+ + -		
<u> </u>					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
investments			14	37,201.	
4 Dividends and interest from securities			14	170,641.	
5 Net rental income or (loss) from real estate:			1 1	· · ·	
a Debt-financed property					
b Not debt-financed property			1 1	-	
6 Net rental income or (loss) from personal			+ + +		
			1 1		
property				<u></u>	
7 Other investment income					
8 Gain or (loss) from sales of assets other					
than inventory			18	<5,850.>	·
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a			1 1		
b					
c					
d					
e					· · · · · · · · · · · · · · · · · · ·
12 Subtotal. Add columns (b), (d), and (e)		0		201,992.	0
13 Total. Add line 12, columns (b), (d), and (e)	 		<u> </u>	13	201,992
(See worksheet in line 13 instructions to verify calculat	ione \				
	•			- · · · · · · · · · · · · · · · · · · ·	,
Part XVI-B Relationship of Activi	ities to the Accom	plishment of E	xempt Pu	ırposes	
Line No. Explain below how each activity for wh		- 1 - 1 D - 1 N (I	A		1144
Explain both the second and the seco			A contributed	importantly to the accomp	iisnment of
the foundation's exempt purposes (oth	er than by providing fullus	TOT SUCH PULPOSES).			
					
	-				
					•
			-		

Form 990-PF (20.11) JEFFREY S AND HELEN H CARDON FOUNDATION 20-2029087 Part: XVII | Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of

י טוע נוופ	organization unectly or mun	rectly engage in any or the lollowing	ig with any other organization	described in Section 50 I(c) of	ו עי	65	10
the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?							
a Transfe	rs from the reporting found:	ation to a noncharitable exempt or	ganization of:				
(1) Cas	sh				1a(1)		X
(2) Oth	er assets				1a(2)		$\overline{\mathbf{x}}$
b Other tra	ansactions:						_
(1) Sale	es of assets to a noncharital	ble exempt organization			1b(1)	- 1	X
		ncharitable exempt organization			1b(2)		$\frac{\overline{x}}{x}$
	ntal of facilities, equipment,						$\frac{\dot{\mathbf{x}}}{\mathbf{x}}$
				•	1b(3)		$\frac{x}{x}$
٠,,	mbursement arrangements				1b(4)		
	ins or loan guarantees				1b(5)		X
		embership or fundraising solicitation			1b(6)		X
		uling lists, other assets, or paid em			1c		X
d If the an	swer to any of the above is	"Yes," complete the following sche	edule. Column (b) should alwa	ays show the fair market value of the goods, ot	her asset	S,	
or servi	ces given by the reporting fo	oundation. If the foundation receiv	ed less than fair market value	in any transaction or sharing arrangement, sh	ow in		
column	(d) the value of the goods,	other assets, or services received.					
a)Line no	(b) Amount involved	(c) Name of noncharitable	e exempt organization	(d) Description of transfers, transactions, and sh	naring arran	gement	3
		N/A					
	· · · · · · · · · · · · · · · · · · ·						
							—
			·· -				
			· · · · · · · · · · · · · · · · · · ·				
							_
			· ·				
							—
							—
-				 			
							
		tly affiliated with, or related to, one		tions described	_		
ın sectio	n 501(c) of the Code (other	r than section 501(c)(3)) or in sect	tion 527?	<u> </u>	_ Yes	X	Vo
b If "Yes,"	complete the following sche						
	(a) Name of org	anization	(b) Type of organization	(c) Description of relationshi	p		_
	N/A						_
							
				- · · · ·			—
							—
	•						—
Und	er penalities of perkury. I declare t	that I have examined this return. Includin	n accompanying schedules and sta	atements, and to the best of my knowledge			
l and i	belief, it is true, Gorrect, and com	iplete Declaration of prepaler (other than	n taxpayer) is based on all informati	May t	në IHS disc with the pr		П
Sign Here	JY DXR 15	1. / Malen	15/11/17	show	n below (se	e instr)?	,
 	0130000	1.00000	19/14/16		Yes	ا لـــا	No
Sig	gnature of officer or trustee		Date /	Title			
	Print/Type preparer's na	me Preparer's si	gnature - D	Pate Check if PTIN			
		Vlan a	tan (with)	5-(1./2 self- employed			
Paid	MARY KAY G	RIFFIN		P00	1856	75	
Preparer	Firm's name ► CBI	Z MHM, LLC	UU III	Firm's EIN ▶ 34-18			_
Jse Only		•			- ·	-	
,		5 S WEST TEMPLE	, STE 650				—
		LT LAKE CITY, U		Dharras 9.01 2	64.01	3 0 0	
	J SA	DI DAVE CILI' O	T 04TAT	Phone no. 801-3			
				Form	990-P	F (20)	11)

Schedule B (Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2011

Name of the organization

Employer identification number

J	EFFREY S AND HELEN H CARDON FOUNDATION	20-2029087					
Organization type (check	one):						
Filers of:	Section:						
Form 990 or 990-EZ	501(c)() (enter number) organization						
	4947(a)(1) nonexempt charitable trust not treated as a private foundation						
	527 political organization						
Form 990-PF	X 501(c)(3) exempt private foundation						
	4947(a)(1) nonexempt charitable trust treated as a private foundation	4947(a)(1) nonexempt charitable trust treated as a private foundation					
	501(c)(3) taxable private foundation						
• •	is covered by the General Rule or a Special Rule.)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Ru	ule. See instructions.					
General Rule							
	on filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in molete Parts I and II.	oney or property) from any one					
Special Rules							
509(a)(1) and 170	(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the reg (b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.						
total contributions	For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.						
For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Do not complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year.							
but it must answer "No" or	hat is not covered by the General Rule and/or the Special Rules does not file Schedule En Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on Part the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).	•					

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2011)

Name of organization

Employer identification number

JEFFREY S AND HELEN H CARDON FOUNDATION

20-2029087

Part I C	ontributors (s	ee instructions)	. Use dupli	cate copies of	Part I if add	itional space is	needed.
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(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	JEFF AND HELEN CARDON 1663 SOUTH DEVONSHIRE DRIVE SALT LAKE CITY, UT 84108	s <u>1,500,000</u> .	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) _No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
			Person Payroll Noncash (Complete Part II if there is a noncash contribution.)

Name of organization

Employer identification number

JEFFREY S AND HELEN H CARDON FOUNDATION

20-2029087

Part II	Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.
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(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Page 4 Schedule B (Form 990, 990-EZ, or 990-PF) (2011) Name of organization **Employer identification number** JEFFREY S AND HELEN H CARDON FOUNDATION 20-2029087 Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once) Part III Use duplicate copies of Part III if additional space is needed. (a) No. from Part I (b) Purpose of gift (c) Use of gift (d) Description of how gift is held (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from Part I (c) Use of gift (d) Description of how gift is held (b) Purpose of gift (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from Part I (d) Description of how gift is held (b) Purpose of gift (c) Use of gift

(e) Transfer of gift

(a) No. from (d) Description of how gift is held (b) Purpose of gift (c) Use of gift Part I (e) Transfer of gift

Transferee's name, address, and ZIP + 4

Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee

Relationship of transferor to transferee

JEFFREY S AND HELEN H CARDON FOUNDATION

20-2029087

197,250.

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Purpose of grant or contribution Foundation Amount status of Name and address (home or business) recipient CRIMSON CLUB NONE CHARITABLE CONTRIBUTION 5,000. DO SOMETHING NONE CHARITABLE CONTRIBUTION 5,000. FIRST TEE OF UTAH NONE CHARITABLE CONTRIBUTION 7,000. GAMMA BETA RISING NONE CHARITABLE CONTRIBUTION 10,000. HIGHLAND EDUCATION FOUNDATION NONE CHARITABLE CONTRIBUTION 1,000. MAKE-A-WISH FOUNDATION NONE CHARITABLE CONTRIBUTION 100. MULTIPLE SCLEROSIS SOCIETY NONB CHARITABLE CONTRIBUTION 3,500. OGDEN SCHOOL NONE CHARITABLE CONTRIBUTION 5,000. RED BUTTE GARDEN NONE CHARITABLE CONTRIBUTION 1,200. SALT LAKE ARTS CENTER NONE CHARITABLE CONTRIBUTION 500.

Total from continuation sheets

JEFFREY S AND HELEN H CARDON FOUNDATION 20-2029087

Part XV | Supplementary Information

Part XV Supplementary Information	on			
3 Grants and Contributions Paid During the				
Recipient	If recipient is an individual, show any relationship to any foundation manager status of		Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
SPRINGVILLE MUSEUM	NONE		CHARITABLE	
			CONTRIBUTION	5,000.
THE CHILDREN'S CENTER	NONE		CHARITABLE	50.500
			CONTRIBUTION	57,500.
THE NEIGHBORHOOD HOUSE	NONE		CHARITABLE CONTRIBUTION	10,000.
				ŀ
THE UNIVERSITY OF NOTRE DAME	NONE		CHARITABLE	
			CONTRIBUTION	55,000.
THE UNIVERSITY OF UTAH	NONE		CHARITABLE	
			CONTRIBUTION	29,500.
WEILENMANNN SCHOOL OF DISCOVERY	NONE		CHARITABLE	
		.	CONTRIBUTION	1,000.
YMAD	NONE		CHARITABLE	
IMD	HOME		CONTRIBUTION	700.
•				
YOUTHLING	NONE		CHARITABLE	
			CONTRIBUTION	250.
· · · · · · · · · · · · · · · · · · ·				
Total from continuation sheets	<u> </u>		1	

FORM 990-PF INTEREST ON SAVI	NGS AND TEM	PORARY CASH	INVESTMENTS	STATEMENT 1	
SOURCE				AMOUNT	
CHARLES SCHWAB	37,201.				
TOTAL TO FORM 990-PF, PART I,	37,201.				
FORM 990-PF DIVIDEND	S AND INTER	EST FROM SE	CURITIES	STATEMENT 2	
SOURCE	GROSS	AMOUNT	APITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT	
CHARLES SCWHAB CHARLES SCWHAB		4,287. 166,354.	0.	4,287. 166,354.	
TOTAL TO FM 990-PF, PART I, LI	N 4	170,641.	0.	170,641.	
FORM 990-PF	ACCOUNTI	NG FEES		STATEMENT 3	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST MENT INCOM			
ACCOUNTING FEES	1,370.	1,37	0.	0. 0.	
TO FORM 990-PF, PG 1, LN 16B	1,370.	1,37	0.	0.	
FORM 990-PF 07	THER PROFES	SIONAL FEES		STATEMENT 4	
DESCRIPTION		(B) NET INVEST MENT INCOM	(C) - ADJUSTEI E NET INCON		
BROKERAGE FEES	656.	65	6.	0. 0.	
TO FORM 990-PF, PG 1, LN 16C	656.	65	6.	0. 0.	

TAX	TAXES			STATEMENT !		
(A) EXPENSES PER BOOKS						
76.		76.		0.	0.	
76.		76.		0.	0.	
STATE/CITY GO	OVERNMENT	OBLIGA'	rions	STATEMENT	6	
		воок	VALUE	FAIR MARKE VALUE	т	
X X X X X		10 20 11	09,557. 06,494. 57,497. 0.	156,8 108,6 200,3 153,0	40. 00. 23.	
TOTAL U.S. GOVERNMENT OBLIGATIONS				896,5	77.	
OVERNMENT OBL	GATIONS					
II, LINE 10A	=	9(04,064.	896,5	77.	
CORPORATE	STOCK			STATEMENT	7	
		BOOK V	/ALUE	FAIR MARKE' VALUE	T	
	-	85 67		262,14 859,98 561,00 248,38	88. 09.	
	EXPENSES PER BOOKS 76. 76. O STATE/CITY GO X X X X X X ATIONS OVERNMENT OBLI II, LINE 10A CORPORATE	EXPENSES NET INVE PER BOOKS MENT INC 76. 76. U.S. OTHER GOV'T GOV'T X X X X X ATIONS OVERNMENT OBLIGATIONS II, LINE 10A CORPORATE STOCK	EXPENSES NET INVEST- PER BOOKS MENT INCOME N. 76. 76. 76. 76. STATE/CITY GOVERNMENT OBLIGATIONS WAY 10 A 10 A 10 A 10 A 10 A 10 A 10 A 10	EXPENSES NET INVEST- ADJUSTEI PER BOOKS MENT INCOME NET INCOME 76. 76. 76. 76. 76. 76. STATE/CITY GOVERNMENT OBLIGATIONS U.S. OTHER GOV'T GOV'T BOOK VALUE X 157,128. X 109,557. X 206,494. X 157,497. X 0. X 273,388. ATIONS 904,064. CORPORATE STOCK BOOK VALUE 179,328. 854,775.	EXPENSES NET INVEST- ADJUSTED CHARITA PER BOOKS MENT INCOME NET INCOME PURPOS 76. 76. 0. 76. 76. 0. STATE/CITY GOVERNMENT OBLIGATIONS STATEMENT U.S. OTHER GOV'T BOOK VALUE VALUE X 157,128. 156,8 X 109,557. 108,6 X 206,494. 200,3 X 157,497. 153,0 X 273,388. 277,7 ATIONS 904,064. 896,5 CORPORATE STOCK STATEMENT BOOK VALUE FAIR MARKE VALUE 179,328. 262,1 854,775. 859,9	