Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

2011

For calendar year 2011, or tax year beginning 01-01-2011 , and ending 12-31-2011

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
MCCARTHEY FAMILY FOUNDATION

A Employer identification number
20-8067695

Number and street (or P O box number if mail is not delivered to street address)
610 EAST SOUTH TEMPLE Room No 200

Room/suite

B Telephone number (see page 10 of the instructions)
(801) 578-1240

City or town, state, and ZIP code
SALT LAKE CITY, UT 84102

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐

2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

H Check type of organization ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶$ 40,486,115

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 page 11 of the instructions))*	**(a)** Revenue and expenses per books	**(b)** Net investment income	**(c)** Adjusted net income	**(d)** Disbursements for charitable purposes (cash basis only)
Revenue 1	Contributions, gifts, grants, etc , received (attach schedule)				
2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
3	Interest on savings and temporary cash investments	5,744	5,744		
4	Dividends and interest from securities	1,173,603	1,173,603		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	219,968			
b	Gross sales price for all assets on line 6a 7,613,522				
7	Capital gain net income (from Part IV, line 2)		219,968		
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)	105,239	105,239		
12	**Total.** Add lines 1 through 11	1,504,554	1,504,554		
Operating and Administrative Expenses 13	Compensation of officers, directors, trustees, etc	90,000	45,000		45,000
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule)	155	78		77
c	Other professional fees (attach schedule)	113,414			113,414
17	Interest	125			125
18	Taxes (attach schedule) (see page 14 of the instructions)	34,834	31,277		3,557
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings	5,893			5,893
22	Printing and publications	13,468			13,468
23	Other expenses (attach schedule)	172,825	127,039		45,786
24	**Total operating and administrative expenses.** Add lines 13 through 23	430,714	203,394		227,320
25	Contributions, gifts, grants paid	1,989,700			1,989,700
26	**Total expenses and disbursements.** Add lines 24 and 25	2,420,414	203,394		2,217,020
27	Subtract line 26 from line 12				
a	**Excess of revenue over expenses and disbursements**	-915,860			
b	**Net investment income** (if negative, enter -0-)		1,301,160		
c	**Adjusted net income** (if negative, enter -0-)				

Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	651,747	529,184	529,184
	3	Accounts receivable ▶ ________ Less allowance for doubtful accounts ▶ ________			
	4	Pledges receivable ▶ ________ Less allowance for doubtful accounts ▶ ________			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ ________ Less allowance for doubtful accounts ▶ ________			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ ________ Less accumulated depreciation (attach schedule) ▶ ________			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	39,935,281	39,153,640	39,956,931
	14	Land, buildings, and equipment basis ▶ ________ Less accumulated depreciation (attach schedule) ▶ ________			
	15	Other assets (describe ▶ ________)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	40,587,028	39,682,824	40,486,115
Liabilities	17	Accounts payable and accrued expenses		11,656	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ ________)			
	23	**Total liabilities** (add lines 17 through 22)		11,656	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☑ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	40,587,028	39,671,168	
	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** (see page 17 of the instructions)	40,587,028	39,671,168	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	40,587,028	39,682,824	

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	40,587,028
2	Enter amount from Part I, line 27a	2	-915,860
3	Other increases not included in line 2 (itemize) ▶ ________	3	
4	Add lines 1, 2, and 3	4	39,671,168
5	Decreases not included in line 2 (itemize) ▶ ________	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	39,671,168

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	See Additional Data Table			
b				
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	See Additional Data Table			
b				
c				
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	See Additional Data Table			
b				
c				
d				
e				

2	Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	219,968
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	23,366

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 page 18 of the 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))
2010	3,436,193	42,841,036	000 080208
2009	2,032,191	40,103,486	000 050674
2008	1,428,938	16,280,507	000 087770
2007			
2006			

2	**Total** of line 1, column (d).	2	000 218652
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	000 072884
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5.	4	42,696,648
5	Multiply line 4 by line 3.	5	3,111,902
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	13,012
7	Add lines 5 and 6.	7	3,124,914
8	Enter qualifying distributions from Part XII, line 4.	8	2,217,020

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 on page 18

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ____________ **(attach copy of letter if necessary–see instructions)**		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b	1	26,023
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	
3	Add lines 1 and 2	3	26,023
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	26,023
6	Credits/Payments		
a	2011 estimated tax payments and 2010 overpayment credited to 2011 — 6a — 1,929		
b	Exempt foreign organizations—tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c — 17,000		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments Add lines 6a through 6d	7	18,929
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	126
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	7,220
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 2012 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?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		No
	*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.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ________ **(2)** On foundation managers ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ________			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ AK			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b		No
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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV on page 27)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

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 page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶Todd F Brashear CPA Telephone no ▶(801) 578-1246

Located at ▶610 E South Temple Suite 200 Salt Lake City UT ZIP+4 ▶84102

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 | |

			Yes	No
16	At any time during calendar year 2011, 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		No

See the instructions for exceptions and filing requirements for Form TD F 90-22 1 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
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 20 of the instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐			
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 2011?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? ☐ Yes ☑ No			
	If "Yes," list the years ▶ 20____ , 20____ , 20____ , 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see page 20 of the instructions)	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____ , 20____ , 20____ , 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 2011 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 2011.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?	4b		No

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ **Yes** ☑ **No**			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ **Yes** ☑ **No**			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ **Yes** ☑ **No**			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the 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 page 22 of the instructions)?	**5b**		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ **Yes** ☐ **No**			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ **Yes** ☐ **No**			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		**No**
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ **Yes** ☑ **No**			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**		

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the 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
See Additional Data Table				

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the 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
Total number of other employees paid over $50,000 ▶				

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 page 23 of the instructions). If none, enter "NONE".

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
Mary Kay Lazarus Public Relations Inc PO Box 58 1198 Salt Lake City, UT 84158	Administrative Public Relations	56,062

Total number of others receiving over $50,000 for professional services. . . . . ▶

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 NONE	0
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 23 of the 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 page 24 of the instructions 3	
Total. Add lines 1 through 3. . . . . ▶	

Part X **Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	42,972,248
b	Average of monthly cash balances	1b	374,603
c	Fair market value of all other assets (see page 24 of the instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	43,346,851
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	43,346,851
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions)	4	650,203
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	42,696,648
6	**Minimum investment return.** Enter 5% of line 5	6	2,134,832

Part XI **Distributable Amount** (see page 25 of the 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	2,134,832
2a	Tax on investment income for 2011 from Part VI, line 5	2a	26,023		
b	Income tax for 2011 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	26,023
3	Distributable amount before adjustments Subtract line 2c from line 1			3	2,108,809
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	2,108,809
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	2,108,809

Part XII **Qualifying Distributions** (see page 25 of the 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	2,217,020
b	Program-related investments—total from Part IX-B	1b	
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	2,217,020
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 page 26 of the instructions)	5	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	2,217,020

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 page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				2,108,809
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only.				
b Total for prior years 20___, 20___, 20___				
3 Excess distributions carryover, if any, to 2011				
a From 2006.				
b From 2007.				
c From 2008. 614,913				
d From 2009. 34,401				
e From 2010. 1,310,033				
f **Total** of lines 3a through e.	1,959,347			
4 Qualifying distributions for 2011 from Part XII, line 4 ▶ $ 2,217,020				
a Applied to 2010, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .				
d Applied to 2011 distributable amount.				2,108,809
e Remaining amount distributed out of corpus	108,211			
5 Excess distributions carryover applied to 2011 *(If an amount appears in column (d), the same amount must be shown in column (a).)*				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,067,558			
b Prior years' undistributed income Subtract line 4b from line 2b				
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.				
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . .				
e Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				
f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2006 not applied on line 5 or line 7 (see page 27 of the instructions)				
9 **Excess distributions carryover to 2012.** Subtract lines 7 and 8 from line 6a	2,067,558			
10 Analysis of line 9				
a Excess from 2007. . . .				
b Excess from 2008. . . . 614,913				
c Excess from 2009. . . . 34,401				
d Excess from 2010. . . . 1,310,033				
e Excess from 2011. . . . 108,211				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2011, enter the date of the ruling. . . . . . . ▶

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2011	**(b)** 2010	**(c)** 2009	**(d)** 2008	
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					

Part XV Supplementary Information (Complete this part only if the organization had $5,000 or more in assets at any time during the year—see page 27 of the 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))

NONE

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 (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

Todd F Brashear Executive Director
610 East South Temple Ste 200
Salt Lake City, UT 84102
(801) 578-1246

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

Grant request letter, supporting documentation, IRS tax-exempt determination letter

c Any submission deadlines

NONE

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

NONE

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 Additional Data Table				
Total . . . . ▶ **3a**				1,989,700
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	5,744	
4 Dividends and interest from securities			14	1,173,603	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			24	105,239	
8 Gain or (loss) from sales of assets other than inventory			18	219,968	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				1,504,554	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 1,504,554

(See worksheet in line 13 instructions on page 28 to verify calculations)

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

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 organization's exempt purposes (other than by providing funds for such purposes) (See page 28 of the instructions)
N/A	0

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	**1a(1)**		No
(2) Other assets.	**1a(2)**		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	**1b(1)**		No
(2) Purchases of assets from a noncharitable exempt organization.	**1b(2)**		No
(3) Rental of facilities, equipment, or other assets.	**1b(3)**		No
(4) Reimbursement arrangements.	**1b(4)**		No
(5) Loans or loan guarantees.	**1b(5)**		No
(6) Performance of services or membership or fundraising solicitations.	**1b(6)**		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	**1c**		No

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line No	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

b If "Yes," complete the following schedule

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

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

******	2012-11-13	******
Signature of officer or trustee	Date	Title

Paid Preparer's Use Only

Preparer's Signature Todd F Brashear	Date 2012-11-13	Check if self-employed ☐	PTIN
Firm's name ▶ Todd F Brashear CPA		Firm's EIN ▶	
Firm's address ▶ 610 East South Temple 200 Salt Lake City, UT 84102		Phone no (801) 578-1246	

May the IRS discuss this return with the preparer shown above? See instructions ▶ ☑ Yes ☐ No

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491318012062

TY 2011 Accounting Fees Schedule

Name: MCCARTHEY FAMILY FOUNDATION

EIN: 20-8067695

Software ID: 11000218

Software Version: 2011.0.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Payroll Perfect, Inc	155	78		77

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491318012062

TY 2011 All Other Program Related Investments Schedule

Name: MCCARTHEY FAMILY FOUNDATION

EIN: 20-8067695

Software ID: 11000218

Software Version: 2011.0.0

Category	Amount
N/A	

TY 2011 Explanation of Non-Filing with Attorney General Statement

Name: MCCARTHEY FAMILY FOUNDATION

EIN: 20-8067695

Software ID: 11000218

Software Version: 2011.0.0

Statement: The Attorney General for the State of Alaska does not require a copy of Form 990-PF to be furnished.

TY 2011 General Explanation Attachment

Name: MCCARTHEY FAMILY FOUNDATION

EIN: 20-8067695

Software ID: 11000218

Software Version: 2011.0.0

Identifier	Return Reference	Explanation

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93491318012062

TY 2011 Investments - Other Schedule

Name: MCCARTHEY FAMILY FOUNDATION

EIN: 20-8067695

Software ID: 11000218

Software Version: 2011.0.0

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
JPM Structured Equity Notes	AT COST	1,910,000	1,925,901
JPMorgan Managed Equity Portfolio	AT COST	26,598,889	26,675,693
JPMorgan Global Access Portfolios, LLC	AT COST	8,942,072	9,587,880
Paradigm Equities I, LLC	AT COST	448,823	451,437
Paradigm Master Fund, L.P.	AT COST	159,944	144,569
Accrued Interest Dividends	AT COST	33,131	33,131
Next IT Corporation	AT COST	500,000	500,000
Starwood Opportunities Fund VIII, LLC	AT COST	560,781	638,320

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491318012062

TY 2011 Other Expenses Schedule

Name: MCCARTHEY FAMILY FOUNDATION

EIN: 20-8067695

Software ID: 11000218

Software Version: 2011.0.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Security	200			200
Supplies	275			275
RentLease Expense	21,646			21,646
Licenses Fees	304			304
Meals Entertainment	275			275
Portfolio Deductions Section 1256 Net GainLoss	56,566	56,566		
Investment Interest Expense	18,434	18,434		
Commissions Investment Fees	52,039	52,039		
Insurance	4,572			4,572
Catering Expense	15,191			15,191
Postage	17			17
Contract Labor	2,500			2,500
Advertising	806			806

TY 2011 Other Income Schedule

Name: MCCARTHEY FAMILY FOUNDATION

EIN: 20-8067695

Software ID: 11000218

Software Version: 2011.0.0

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
From Investment Schedules K-1	105,239	105,239	

TY 2011 Other Professional Fees Schedule

Name: MCCARTHEY FAMILY FOUNDATION

EIN: 20-8067695

Software ID: 11000218

Software Version: 2011.0.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Cardon-Ferro Creative	3,550			3,550
Mary Kay Lazarus Public Relations, Inc	56,062			56,062
Washington Speakers Bureau	50,000			50,000
La Petite Photo	500			500
Marty Collins Photographers	3,302			3,302

TY 2011 Taxes Schedule

Name: MCCARTHEY FAMILY FOUNDATION

EIN: 20-8067695

Software ID: 11000218

Software Version: 2011.0.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Excise Tax on investment income	9,875	9,875	0	0
Payroll taxes	7,114	3,557	0	3,557
Foreign dividends taxes	17,845	17,845	0	0

Additional Data

Software ID:	11000218
Software Version:	2011.0.0
EIN:	20-8067695
Name:	MCCARTHEY FAMILY FOUNDATION

Part VI Line 7 - Tax Paid Original Return: 18929

Form 990PF - Special Condition Description:

Special Condition Description

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
7200 Sprint Nextel Corp	P	2011-02-10	2011-08-25
1900 Yahoo Inc	P	2011-03-24	2011-08-25
900 BP PLC	P	2011-01-01	2011-10-07
700 ITT Industries Inc	P	2011-01-01	2011-10-07
800 Motorola Solutions Inc	P	2011-08-05	2011-10-07
700 Mylan Laboratories Inc	P	2011-05-18	2011-10-07
200 Newmont Mining Corp	P	2011-08-05	2011-10-07
800 Plains Exploration Production	P	2011-04-28	2011-10-07
536 Cemex S A	P	2010-05-21	2011-04-27
2000 Genworth Financial Inc	P	2009-07-31	2011-01-13
1000 Mylan Lab Inc	P	2008-10-13	2011-01-13
1850 Korea Electric Power Co	P	2010-02-01	2011-02-16
1400 Williams Companies Inc	P	2010-02-01	2011-02-17
Cemex S A Frac Shrs	P	2010-04-01	2011-04-07
700 XL Group PLC	P	2008-09-15	2011-04-27
700 Madison Square Garden Co	P	2010-02-22	2011-06-20
2600 Cemex S A	P	2010-05-21	2011-07-20
1600 Genworth Financial Inc	P	2009-07-31	2011-07-26
1000 XL Group PLC	P	2008-09-15	2011-07-28
1300 Western Union Co	P	2008-03-18	2011-08-01
2700 Pharmerica Corp	P	2010-08-01	2011-08-23
2500 Delta Airlines Inc	P	2009-06-03	2011-08-25
1000 Anglogold Ashanti Ltd	P	2008-07-14	2011-10-07
4200 Bank of America Corp	P	2009-02-05	2011-10-07
1400 Carefusion Corp	P	2009-09-10	2011-10-07
870 Citigroup Inc New	P	2010-01-26	2011-10-07
400 Devon Energy Corp	P	2010-10-01	2011-10-07
1800 GE Co	P	2010-10-01	2011-10-07
800 Madison Sq Garden Co	P	2010-02-22	2011-10-07
1000 Mylan Lab Co	P	2008-10-13	2011-10-07

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
1000 Newmont Mining Corp	P	2010-10-01	2011-10-07
800 QEP Resources Inc	P	2010-08-17	2011-10-07
1500 Textron Inc	P	2009-06-03	2011-10-07
200000 BNP SPX Note	P	2010-04-09	2011-01-25
94506 Threadneedle Asia Pac	P	2010-09-09	2011-01-31
150000 DB GSCI Oil Part CPN	P	2011-01-07	2011-10-07
JPM Short Duration Bond FD	P	2010-01-01	2011-01-06
Ridgeworth Intermediate Bd FD	P	2009-06-03	2011-01-12
JPM Short Duration Bond FD	P	2009-06-03	2011-01-25
JPM Short Duration Bond FD	P	2009-06-03	2011-03-30
200000 GS EAFE Note	P	2010-04-01	2011-04-25
Ridgeworth Int Bond FD	P	2009-06-03	2011-12-31
250000 Barc 95	P	2009-06-26	2011-07-01
JPM Short Duration Bond FD	P	2009-06-03	2011-07-28
250000 Deutsche BK ARN SPX	P	2008-07-25	2011-08-11
250000 Morgan Stanley ARN SPX	P	2008-08-08	2011-08-25
150000 GS Gold CPN Note	P	2010-10-01	2011-10-14
TransAmerica FDS	P	2010-11-01	2011-11-23
Ivy Global Natural Resource	P	2009-09-17	2011-12-01
200000 CS Bren EAFE	P	2010-11-19	2011-12-07
JPM Short Duration Bond FD	P	2009-06-03	2011-12-15
150000 MS Cmmdty Index BREN	P	2010-06-11	2011-12-19
Paradigm Master Fund	D	2011-01-15	2011-12-31
Paradigm Master Fund	D	2008-01-29	2011-12-31
JPM Global Access Portfolio	P	2011-01-15	2011-12-31
JPM Global Access Portfolio	P	2008-01-29	2011-12-31
Ridgeworth Intermediate Bd FD	P	2009-06-30	2011-12-31
Sankaty Dip Opp Fund	P	2009-10-31	2011-12-31

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
23,779		32,534	-8,755
24,728		31,908	-7,180
33,148		39,955	-6,807
30,855		37,820	-6,965
34,744		33,756	988
12,104		16,552	-4,448
12,461		11,148	1,313
19,100		29,693	-10,593
4,587		5,058	-471
28,539		13,848	14,691
22,670		8,514	14,156
23,756		22,030	1,726
41,640		31,972	9,668
6			6
16,687		12,459	4,228
18,726		13,528	5,198
20,015		24,535	-4,520
13,354		11,079	2,275
20,981		17,798	3,183
24,815		27,921	-3,106
39,123		45,077	-5,954
17,040		18,059	-1,019
40,125		33,560	6,565
24,822		20,996	3,826
33,779		26,153	7,626
21,671		28,541	-6,870
22,746		31,653	-8,907
27,845		56,330	-28,485
18,124		15,461	2,663
17,291		8,514	8,777

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
62,303		43,181	19,122
22,080		25,314	-3,234
27,187		17,053	10,134
214,000		200,000	14,000
1,314,582		1,186,999	127,583
120,075		150,000	-29,925
150,000		146,970	3,030
450,000		446,449	3,551
100,000		97,725	2,275
150,000		146,855	3,145
200,000		200,000	
1,573,296		1,548,452	24,844
314,043		263,673	50,370
100,000		97,371	2,629
247,234		250,000	-2,766
240,814		250,000	-9,186
174,750		150,000	24,750
606,536		748,350	-141,814
152,750		145,417	7,333
187,264		200,000	-12,736
125,000		122,491	2,509
179,025		150,000	29,025
699			699
		40,261	-40,261
		46,073	-46,073
212,623			212,623
		5,099	-5,099
		9,369	-9,369

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			-8,755
			-7,180
			-6,807
			-6,965
			988
			-4,448
			1,313
			-10,593
			-471
			14,691
			14,156
			1,726
			9,668
			6
			4,228
			5,198
			-4,520
			2,275
			3,183
			-3,106
			-5,954
			-1,019
			6,565
			3,826
			7,626
			-6,870
			-8,907
			-28,485
			2,663
			8,777

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			19,122
			-3,234
			10,134
			14,000
			127,583
			-29,925
			3,030
			3,551
			2,275
			3,145
			24,844
			50,370
			2,629
			-2,766
			-9,186
			24,750
			-141,814
			7,333
			-12,736
			2,509
			29,025
			699
			-40,261
			-46,073
			212,623
			-5,099
			-9,369

Form 990PF Part VIII Line 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
Sarah J McCarthey 610 E South Temple Suite 200 Salt Lake City, UT 84102	Director 002 00	0		
Thomas K McCarthey Jr 610 E South Temple Suite 200 Salt Lake City, UT 84102	Director 002 00	0		
Philip G McCarthey 610 E South Temple Suite 200 Salt Lake City, UT 84102	Director 002 00	0		
Maureen P McCarthey 610 E South Temple Suite 200 Salt Lake City, UT 84102	Director 002 00	0		
Todd F Brashear 610 E South Temple Suite 200 Salt Lake City, UT 84102	Executive Director 010 00	60,000		
John P O'Brien 610 E South Temple Suite 200 Salt Lake City, UT 84102	SecretaryTreasurer 005 00	30,000		

Form 990PF Part XV Line 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*				
American Cancer Society941 East 3300 South Salt Lake City, UT 84106		Charitable	Cancer Research	10,000
Big TLC Foundation9055 South 1300 East 13 Sandy, UT 84094		Charitable	Education/Mentoring Program	25,000
Cathedral of the Madeleine331 E South Temple Salt Lake City, UT 84111		Religious/Charitable	Capital Campaign	50,000
Catholic Community Services745 East 300 South Salt Lake City, UT 84102		Religious/Charitable	Refugee Resettlement and Homeless Program	10,000
Dioceses of Salt Lake27 C Street Salt Lake City, UT 84103		Religious	Capital Campaign	50,000
Fisher House Foundation111 Rockville Pike Ste 420 Rockville, MD 20850		Charitable	Capital Campaign	10,000
Girl Scouts of Utah445 East 4500 South Salt Lake City, UT 84157		Charitable	Capital Campaign	25,000
Gonzaga UniversityUniversity Relations Spokane, WA 99258		Charitable	Capital Campaign	375,000
High Road for Human Rights201 S Main Street Ste 1400 Salt Lake City, UT 84111		Charitable	Program Funding	35,000
Holy Cross Ministries860 East 4500 South Ste 204 Salt Lake City, UT 84107		Religious	Mental Health Counseling-Students	20,000
House of Hope857 East 200 South Salt Lake City, UT 84102		Charitable	Capital Campaign	40,000
Judge Memorial Catholic School 650 South 1100 East Salt Lake City, UT 84102		Religious/Educationa	Capital Campaign/Tuition Assistance	126,700
Kearns St Ann's Catholic School 430 East 2100 South Salt Lake City, UT 84115		Religious/Educationa	Tuition Assistance Youth Sports Program	118,000
Make-A-Wish Foundation771 East Winchester Murray, UT 84107		Charitable	Program Funding	1,500
National Multiple Sclerosis Society6364 S Highland Dr Ste 101 Salt Lake City, UT 84121		Charitable/Scientifi	Multiple Sclerosis Research	70,000
Rape Recovery Center2035 South 1300 East Salt Lake City, UT 84105		Charitable	Program Funding	2,500
Rowland Hall - St Mark's School 720 Guardsman Way Salt Lake City, UT 84108		Educational	Capital Campaign	20,000
Saint Vincent de Paul School1385 E Spring Lane Salt Lake City, UT 84117		Religious/Educationa	Tuition Assistance	3,000
St Ambrose Church2315 Redondo Ave Salt Lake City, UT 84108		Religious	Capital Campaign	60,000
The Living Planet Aquarium725 East 10600 South Sandy, UT 84094		Charitable	Capital Campaign	5,000
The Madeleine Choir School205 East 1st Avenue Salt Lake City, UT 84103		Religious/Educationa	Tuition Assistance	85,000
University of Utah Neuropyschiatric540 Arapeen Drive Salt Lake City, UT 84108		Charitable/Scientifi	Capital Campaign	100,000
University of Utah School of Music 1375 E Presidents Cir 204 Salt Lake City, UT 84108		Educational	Piano Outreach Program	2,500
Utah Food Bank3150 South 900 West Salt Lake City, UT 84119		Charitable	Program Funding	5,000
Utah Health and Human Rights Projec225 South 200 East Ste 250 Salt Lake City, UT 84111		Charitable	Program Funding	10,000
Utah Open Lands2188 S Highland Dr Ste 203 Salt Lake City, UT 84106		Charitable	Environmental Protection Funding	20,000
Utah Pride Center355 North 300 West First Floor Salt Lake City, UT 84103		Charitable	Program Funding	5,000
Utah Society for Environmental Educ466 East 500 South Ste 100 Salt Lake City, UT 84111		Educational	Environmental Awareness Programs	10,000
Utah SymphonyUtah Opera123 W South Temple Salt Lake City, UT 84101		Charitable	Program Funding for the Arts	6,000
Volunteers of America435 W Bearcat Dr Salt Lake City, UT 84115		Charitable	Homeless Prevention Program	10,000

Form 990PF Part XV Line 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*				
Westminster College1840 South 1300 East Salt Lake City, UT 84105		Educational	Theatre Department Scholarship/Endowment Funding	27,000
YWCA322 East 300 South Salt Lake City, UT 84111		Charitable	Capital Campaign	252,500
University of Utah1825 E South Campus Dr Salt Lake City, UT 84112		Charitable	Capital Campaign	400,000
Total . . . . ▶ **3a**				1,989,700