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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

2011

For calendar year 2011 or tax year beginning

, 2011, and ending

, 20

Name of foundation COPIC Medical Foundation		A Employer identification number 84-1197083	
Number and street (or P O box number if mail is not delivered to street address) 7351 Lowry Boulevard		Room/suite	B Telephone number (see instructions) 720/858-6000
City or town, state, and ZIP code Denver, CO 80230		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 10,351,548		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method. <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____		(Part I, column (d) must be on cash basis)	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	590,429			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	140,646	140,646		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	731,075	140,646			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)	695			695
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	1,495			0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	22,550			22,661
	24 Total operating and administrative expenses. Add lines 13 through 23	24,740			23,356
	25 Contributions, gifts, grants paid	479,000			268,000
26 Total expenses and disbursements. Add lines 24 and 25	503,740			291,356	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	227,335				
b Net investment income (if negative, enter -0-)		140,646			
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	529,961	827,514	827,514
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ see schedule			
	Less: allowance for doubtful accounts ▶	2,670	2,694	2,694
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	7,298,522	6,968,143	6,968,143
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶			
Liabilities	Less: accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	14 Land, buildings, and equipment basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶ Admin. of State Reg Program)	571,844	2,553,197	2,553,197
	16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	8,402,997	10,351,548	10,351,548
	17 Accounts payable and accrued expenses	2,056	1,945	
	18 Grants payable	80,500	291,500	
	19 Deferred revenue			
Net Assets or Fund Balances	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ See attached schedule)	571,844	2,553,197	
	23 Total liabilities (add lines 17 through 22)	654,400	2,846,642	
	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	7,748,597	7,504,906	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)	7,748,597	7,504,906	
	31 Total liabilities and net assets/fund balances (see instructions)	8,402,997	10,351,548	

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	7,748,597
2 Enter amount from Part I, line 27a	2	227,335
3 Other increases not included in line 2 (itemize) ▶ Not applicable	3	0
4 Add lines 1, 2, and 3	4	7,975,932
5 Decreases not included in line 2 (itemize) ▶ See attached schedule	5	471,026
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	7,504,906

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				
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				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
a				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss)	<div style="display: flex; align-items: center;"> <div style="border-left: 1px solid black; border-right: 1px solid black; padding: 0 5px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div> </div>		2	
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 instructions) If (loss), enter -0- in Part I, line 8			3	

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.

(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	414,969	6,958,619	0596
2009	156,337	5,799,529	0270
2008	575,621	6,741,126	.0854
2007	470,580	6,711,998	0701
2006	174,880	5,461,921	0320
2 Total of line 1, column (d)			2 2741
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 0548
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5			4 7,884,711
5 Multiply line 4 by line 3			5 432,082
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 1,406
7 Add lines 5 and 6			7 433,488
8 Enter qualifying distributions from Part XII, line 4 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.			8 291,356

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter. _____ (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1		2,813
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2		0
3	Add lines 1 and 2	3		2,813
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4		0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5		2,813
6	Credits/Payments:			
a	2011 estimated tax payments and 2010 overpayment credited to 2011	6a	4,000	
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d	7		4,000
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		0
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		1,187
11	Enter the amount of line 10 to be. Credited to 2012 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		1,187

Part VII-A Statements Regarding Activities

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?	Yes	No
1a			✓
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)?		✓
	<i>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</i>		
c	Did the foundation file Form 1120-POL for this year?		✓
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? <i>If "Yes," attach a detailed description of the activities</i>	2	✓
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? <i>If "Yes," attach a conformed copy of the changes</i>	3	✓
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	✓
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? <i>If "Yes," attach the statement required by General Instruction T.</i>	5	✓
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	✓
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	7	✓
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ Colorado		
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? <i>If "No," attach explanation</i>	8b	✓
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)? <i>If "Yes," complete Part XIV</i>	9	✓
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	✓

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		✓
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		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✓	
Website address ▶ <u>www.callcopic.com</u>				
14	The books are in care of ▶ <u>Shane Schattinger</u>	Telephone no ▶	<u>720-858-6000</u>	
	Located at ▶ <u>7351 Lowry Boulevard</u>	ZIP+4 ▶	<u>80230-6902</u>	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the year ▶	15		<input type="checkbox"/>
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	Yes	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b	
	Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>		
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	✓
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	✓
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	✓

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: <ul style="list-style-type: none"> (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Provide a grant to an individual for travel, study, or other similar purposes? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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 instructions) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No 			
b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	5b		✓
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? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <i>If "Yes" to 6b, file Form 8870</i>	6b		✓
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 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 attached schedule				

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Not Applicable (no employee received over \$50,000)				
Total number of other employees paid over \$50,000				0

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

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

Part IX-A Summary of Direct Charitable Activities

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

Expenses

1 None

2

3

4

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

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

Amount

1 None

2

All other program-related investments See instructions

3

Total. Add lines 1 through 3 0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	7,254,492
b	Average of monthly cash balances	1b	2,581,870
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	9,836,361
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	9,836,361
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	1,951,651
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	7,884,711
6	Minimum investment return. Enter 5% of line 5	6	394,236

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part)

1	Minimum investment return from Part X, line 6	1	394,236
2a	Tax on investment income for 2011 from Part VI, line 5	2a	2,813
b	Income tax for 2011 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	2,813
3	Distributable amount before adjustments Subtract line 2c from line 1	3	391,423
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	391,423
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	391,423

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	291,356
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	291,356
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	291,356

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				391,423
2 Undistributed income, if any, as of the end of 2011.				
a Enter amount for 2010 only			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2011:				
a From 2006				0
b From 2007				14,601
c From 2008				242,719
d From 2009				0
e From 2010				69,876
f Total of lines 3a through e	327,196			
4 Qualifying distributions for 2011 from Part XII, line 4 ► \$ <u>291,356</u>				
a Applied to 2010, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions)		0		
c Treated as distributions out of corpus (Election required—see instructions)	0			
d Applied to 2011 distributable amount				291,356
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a).)	100,067			100,067
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	227,129			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2010 Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f Undistributed income for 2011. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0			
8 Excess distributions carryover from 2006 not applied on line 5 or line 7 (see instructions)	0			
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	227,129			
10 Analysis of line 9				
a Excess from 2007				0
b Excess from 2008				157,253
c Excess from 2009				0
d Excess from 2010				69,876
e Excess from 2011				0

Part XIV Private Operating Foundations (see 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 foundation 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 foundation had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

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

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 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:

Kathy Brown 7351 Lowry Boulevard, Denver, CO 80230 720-858-6000

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

See attached schedule

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

See attached schedule

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 <i>Paid during the year</i> See attached schedule				
Total			▶ 3a	268,000
b <i>Approved for future payment</i> See attached schedule				
Total			▶ 3b	291,500

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 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					
4 Dividends and interest from securities			14	140,646	
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					
8 Gain or (loss) from sales of assets other than inventory					
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)				140,646	
13 Total. Add line 12, columns (b), (d), and (e)			13	140,646	

(See worksheet in line 13 instructions 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 foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

None

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)	✓
	(2) Other assets	1a(2)	✓
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	✓
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	✓
	(3) Rental of facilities, equipment, or other assets	1b(3)	✓
	(4) Reimbursement arrangements	1b(4)	✓
	(5) Loans or loan guarantees	1b(5)	✓
	(6) Performance of services or membership or fundraising solicitations	1b(6)	✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	✓
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		

[illegible]

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

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
Not Applicable		

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) is based on all information of which preparer has any knowledge.		
	<i>Steve Schattgen</i>	<i>5/14/2012</i>	Accounting Manager
	Signature of officer or trustee	Date	Title

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

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name ▶			Firm's EIN ▶	
	Firm's address ▶			Phone no	

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**

COPIC Medical Foundation

Employer identification number

84-1197083

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

☐ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☒ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒
- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ 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. ▶ \$

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on Part I, line 2, of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization COPIC Medical Foundation	Employer identification number 84-1197083
--	--

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	COPIC Insurance Company 7351 Lowry Boulevard Denver, CO 80230	\$ 590,329	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
2	John Prymak 2984 Elk View Dr Evergreen, CO 80439	\$ 100	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Name of organization
COPIC Medical Foundation

Employer identification number
84-1197083

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	<i>None</i>		
		\$	
(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
		\$	

COPIC Medical Foundation**Form 990-PF****EIN 84-1197083****31-Dec-11****Part I. Analysis of Revenue and Expenses**

Line		(a) Revenue and Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Disbursements for Charitable Purposes
1	Contributions, gifts, grants received				
	COPIC Insurance Company	\$ 590,329			
	7351 Lowry Blvd.				
	Denver, CO 80230				
	 John Prymak	100 00			
	2984 Elk View Dr.				
	Evergreen, CO 80439				
		<u>\$ 590,429</u>			
16c	Other Professional Fees				
	Assoc. of Small Foundations (Dues)	\$ 695			\$ 695
		<u>\$ 695</u>			<u>\$ 695</u>
18	Taxes				
	2010 Reverse Accrual	\$ 89			\$ -
	2011 Estimated Tax	\$ 1,406			\$ -
		<u>\$ 1,495</u>			<u>\$ -</u>
23	Other expenses				
	Miscellaneous Expense	\$ 489			\$ 489
	Administrative Fees	\$ 22,061			\$ 22,172
		<u>\$ 22,550</u>			<u>\$ 22,661</u>

12/31/2011

COPIC Medical Foundation

Form 990-PF

EIN 84-1197083

Part II Balance Sheet, Line 106, Investments - Corporate Stocks

Portfolio Holdings Report

Reported by Issue

Grouped By: Reporting Security Type and Category

COPIC Medical Foundation

Holdings as of December 31, 2011 Accounting Date

Par or Shares	Security Description Int/Div Rate Cusip	Maturity Date	Amortized Value	Cost	Market / Unit	Market Value	% of Type	Estimated Annual Income	Current Yield	Market YTM	Modified Duration	S&P Rating	Moodys Rating
Common Stock													
Mutual Funds													
88,725 10	AMERICAN GROWTH FD OF AMER-A 0 15000 399874-10-6		2,569,275 20	2,569,275 20	28 73000	2,549,072 10	54 05 %	16,732 98	0 661	0 661	N/A	UN	UN
197,038 65	VANGUARD BD INDEX FD INC TOTAL BND 0 48000 921937-60-3		2,004,027 14	2,004,027 14	11 00000	2,167,425 23	45 95 %	92,300 54	4 364	4 364	N/A	UN	UN
285,763.75	Total Mutual Funds		4,573,302 34	4,573,302 34		4,716,497 33	67 69 %	109,033 52	2 363	2 363	0.00000	UN	UN
Other MMF													
64,039 97	EURO PAC GROWTH FD SH BEN INT 0 00000 298706-10-2		2,923,878 09	2,923,878 09	35 16000	2,251,645 32	100 00 %	0 00	0 000	0 000	N/A	UN	UN
64,039.97	Total Other MMF.		2,923,878.09	2,923,878 09		2,251,645.32	32.31 %	0 00	0 000	0 000	0.00000	UN	UN
349,803.72	Total Common Stock		7,497,180 43	7,497,180 43		6,968,142.65	100 00 %	109,033 52	1 599	1 599	0.00000	UN	UN
	Total Portfolio		7,497,180.43	7,497,180.43		6,968,142 65	100 00 %	109,033 52	1 599	1 599	0.00000	UN	UN

COPIC Medical Foundation
Form 990-PF
EIN 84-1197083
31-Dec-11
Part II. Balance Sheets

Line	Beginning of Year		End of Year	
	(a)	(b)	(c)	
	Book Value	Book Value	Fair Mkt Value	
3	Accounts Receivable	\$ -	\$ 100	\$ 100
	Taxes Receivable	\$ 2,670	\$ 2,594	\$ 2,594
	Total	\$ 2,670	\$ 2,694	\$ 2,694
22	Other liabilities			
	Taxes due	\$ -	\$ -	\$ -
	Admin. of State Regulatory Program	\$ 571,844	\$ 2,553,197	\$ 2,553,197
	Total	\$ 571,844	\$ 2,553,197	\$ 2,553,197

COPIC Medical Foundation

Form 990-PF

EIN 84-1197083

31-Dec-11

Part III. Analysis of Changes in Net Assets or Fund Balances

Line

5	Decreases not included in line 2	
	Unrealized Gains/(Losses) - Investments	(471,026.00)
	Total	<u>(471,026.00)</u>

COPIC Medical Foundation
Form 990-PF
EIN 84-1197083
31-Dec-11
Part VII-A. Statements Regarding Activities

Line

10

Contributors

Contribution

COPIC Insurance Company
7351 E. Lowry Blvd.
Denver, CO 80230

\$590,329

Copic Medical Foundation

Form 990-PF

EIN 84-1197083

31-Dec-11

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

Line I	Name	Address	Title	Average Hours Per Week Devoted to Position	Compensation If not paid enter 0	Contributions to Employee Benefit Plan	Expense Account Other Allowances
	Theodore J Clarke, M D	7351 Lowry Boulevard Denver, CO 80230	CEO	Infrequent-less than one hour per week	0	0	0
	Steve Rubin	7351 Lowry Boulevard Denver, CO 80230	COO	Infrequent-less than one hour per week	0	0	0
	Ray Blum, M D	1601 E 19th Ave, Suite 3650 Denver, CO 80218	Director	Infrequent-less than one hour per week	0	0	0
	Linda A Clark	164 Lafayette St Denver, CO 80218	Director	Infrequent-less than one hour per week	0	0	0
	James Driesbach, M D	4 Silver Fox Drive Littleton, CO 80121	Director	Infrequent-less than one hour per week	0	0	0
	Ray J Groves	1566 Ponus Ridge New Canaan, CT 06840	Director	Infrequent-less than one hour per week	0	0	0
	Brian C Harrington, M D	769 Sandhill Circle Steamboat Springs, CO 80487	Director	Infrequent-less than one hour per week	0	0	0
	Steven Hoffenberg, M D	5410 S Cottonwood Ct Greenwood Village, CO 80121	Director	Infrequent-less than one hour per week	0	0	0
	Roberto Masferrer, M D	75 Printers Parkway, Suite 145 Colorado Springs, CO 80910	Director	Infrequent-less than one hour per week	0	0	0
	Richard K Parker, M D	1601 E 19th Ave., Suite 5000 Denver, CO 80218	Director	Infrequent-less than one hour per week	0	0	0
	Kathryn Paul	4582 S Ulster St., Suite 800 Denver, CO 80237	Director	Infrequent-less than one hour per week	0	0	0
	Jennifer A Rollier, M D	456 Feather Court Grand Junction, CO 81503	Director	Infrequent-less than one hour per week	0	0	0
	Walter Rush	2130 E Grand Ave Cherry Hills Village, CO 80113	Director	Infrequent-less than one hour per week	0	0	0
	Peter Whitted, M D	4353 Dodge Street Omaha, NE 68131	Director	Infrequent-less than one hour per week	0	0	0
	John F Wolz, M D	820 South Monaco Parkway, #305 Denver, CO 80224	Director	Infrequent-less than one hour per week	0	0	0
	Gerald V Zarlengo, M D	2542 Taft Court Lakewood, CO 80215	Director	Infrequent-less than one hour per week	0	0	0

COPIC Medical Foundation
990-PF
EIN 84-1197083
Part X. Cash Deemed for Charitable Activities

Line

4 Tax Treatment of Physicians' Peer Health Assistance Fund

The COPIC Medical Foundation has agreed to be the administering entity of the Physicians' Peer Health Assistance Fund ('the Fund'), and has entered into a contract with the State of Colorado, Department of Regulatory Agencies, Board of Medical Examiners ("BME"). The contract relates to the collection and disbursement of funds paid by Colorado physicians and physician assistants as part of their biennial license renewal.

The contract with BME, which expires on June 30, 2014 but can be terminated by either party on 30 days notice, stipulates.

- 1 The Foundation will collect the payments and maintain a separate bank account
- 2 The Foundation will verify to BME the names of all physician and physician assistant applicants who have paid the fee.
3. The Foundation will distribute the funds *as directed by BME* to the approved designated provider (currently Colorado Physician Health Program, a separate nonprofit corporation)
- 4 The Foundation will provide an annual accounting to BME of all amounts collected, expenses incurred, and amounts distributed

We believe that the payments received by the Foundation are not "contributions" and the payments by the Foundation to CPHP are not "grants paid". The payments received by the Foundation are a portion of the license renewal fee paid by physicians/physician assistants and are not voluntary, which means they are not contributions. The payments made by the Foundation to CPHP are not grant payments—rather, they are to reimburse CPHP for services performed by CPHP

IRS regulations allow certain assets to be excluded from the calculation, but the peer assistance funds do not meet any of the specific exceptions outlined in the regulations (Reg 53.4942(a)-2(c)(2)). The instructions to Form 990-PF specifically state that "assets that are held for the production of income or for investment are not considered to be used directly for charitable functions even though the income from the assets is used for the charitable functions". Accordingly, it appears that the peer assistance funds held by the Foundation meet this definition and should be included on Part X, Line 1b. *However*, a deduction is allowed on line 4 for "cash deemed held for charitable activities". Though this is usually an automatic 1.5% of the average fair value, a foundation is allowed to deduct more "if under the facts and circumstances an amount larger than the deemed amount is necessary to pay expenses and disbursements". We believe it is appropriate to deduct the full amount of peer assistance funds on this line, plus the usual 1.5%, because BME can instruct the Foundation to disburse the remaining funds at any time

Copic Medical Foundation
Form 990-PF
EIN 84-1197083
31-Dec-11
Part XV. Supplementary Information

Line

- 2b Completed application, copy of 501(c)(3) letter, total project cost and amount of request to be considered, most recent financial statements and current audit report.
- 2d Charitable, education, civic and scientific purposes related to medicine, medical education, medical research and other medical charitable purposes.

COPIC Medical Foundation**Form 990-PF****EIN 84-1197083****12/31/11****Part XV. Supplementary Information****3. Grants and Contributions Paid During
the Year or Approved for Future Payment****3a.****Grants paid during the year:**

Recipient Name and Address	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
ALS Association-Rocky Mtn Chapter 1201 East Colfax Ave, Suite 202 Denver, CO 80218	Public	For general program support	500
Alzheimer's Association 455 Sherman Street #500 Denver, CO 80203	Public	For general program support	1,750
American Cancer Society-Omaha 9850 Nicholas Street, Suite #200 Omaha, NE 68114	Public	For general program support	1,000
American Heart Association/Desert Mountain Affiliate 1280 S. Parker Road Denver, CO 80231	Public	For general program support	1,500
American Humane Association 63 Inverness Drive East Englewood, CO 80112	Public	For general program support	500
Bonfils Blood Center Foundation 717 Yosemite St Denver, CO 80230	Public	For general program support	10,000
Boys and Girls Clubs of Metro Denver 2017 W 9th Ave Denver, CO 80204	Public	For general program support	500
Brent Eley Foundation 11980 E 16th Street Aurora, CO 80010	Public	For general program support	500
Center for Personalized Education for Physicians 7351 E Lowry Blvd Denver, CO 80230	Public	For general program support	500
Cerebral Palsy of Colorado 801 Yosemite Street Denver, CO 80230	Public	For general program support	15,000

COPIC Medical Foundation**Form 990-PF****EIN 84-1197083****12/31/11****Part XV. Supplementary Information****3. Grants and Contributions Paid During
the Year or Approved for Future Payment****3a.****Grants paid during the year:**

Recipient Name and Address	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
Children's Museum of Denver 2121 Childrens Museum Dr Denver, CO 80211	Public	For general program support	3,000
Clinica Colorado 6500 W 10th Pl Lakewood, CO 80214	Public	For general program support	500
Clinica Campesina Family Health 1345 Plaza Court North Lafayette, CO 80026	Public	For general program support	10,000
Colorado BWRC Fund 9457 University Blvd Highlands Ranch, CO 80126	Public	For general program support	75,500
Colorado Children Immunization Coalition 13611 E. Colfax Ave Aurora, CO 80045	Public	For general program support	15,000
Colorado Mission of Mercy 3690 S Yosemite Street Denver CO 80237	Public	For general program support	10,000
Colorado Nonprofit Development Center 4130 Tejon Street Denver, CO 80211	Public	For general program support	15,000
Crohn's and Colitis Foundation 1777 S Bellaire Street Denver, CO 80222	Public	For general program support	500
Denver Health Foundation 655 Broadway Denver, CO 80203	Public	For general program support	500
Doctors Care, Inc 191 East Orchard Road Littleton, CO 80121	Public	For general program support	1,000
Escuela de Guadalupe 3401 Pecos st Denver, CO 80211	Public	For general program support	500

COPIC Medical Foundation**Form 990-PF****EIN 84-1197083****12/31/11****Part XV. Supplementary Information**
3. Grants and Contributions Paid During
the Year or Approved for Future Payment**3a.****Grants paid during the year:**

Recipient Name and Address	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
Freedom Service Dogs, Inc 2000 West Union Avenue Englewood, CO 80110	Public	For general program support	500
Friends of Man PO Box 937 Littleton, CO 80160	Public	For general program support	500
Halo Foundation 2290 S Jackson st Denver, CO 80210	Public	For general program support	500
Hope Medical Outreach Coalition 4920 S 30th St Omaha, NE 68107	Public	For general program support	500
Hospice of St John Foundation 1320 Everett Ct Lakewood, CO 80215	Public	For general program support	1,000
Inner City Health Center 3405 Downing Street Denver, CO 80205	Public	For general program support	500
Kids in Need of Dentistry 2465 S Downing St #207 Denver, CO 80210-5822	Public	For general program support	500
La Clinica Tepeyac, Inc 5075 Lincoln Street Denver, CO 80216	Public	For general program support	500
Lupus Foundation of Colorado 1211 S Parker Rd Denver, CO 80231	Public	For general program support	500
Maria Droste Services of Colorado 1355 S Colorado Blvd Denver, CO 80222	Public	For general program support	5,000

COPIC Medical Foundation**Form 990-PF****EIN 84-1197083****12/31/11****Part XV. Supplementary Information****3. Grants and Contributions Paid During
the Year or Approved for Future Payment****3a.****Grants paid during the year:**

Recipient Name and Address	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
Metropolitan Denver Dental Foundation 3690 S Yosemite St Denver, CO 80237	Public	For general program support	500
Make a Wish Foundation of Colorado 7951 E Maplewood Ave Greenwood Village, CO 80111	Public	For general program support	500
Mental Health Association of Colorado 1385 S Colorado Blvd Denver, CO 80222	Public	For general program support	500
Mile High Down Syndrome Assoc. 2121 S. Oneida St Denver, CO 80024	Public	For general program support	250
National Society to Prevent Blindness 6818 Grover Street Omaha, NE 68106	Public	For general program support	1,000
Newborn Hope Inc PO Box 2515 Colorado Springs, CO 80901	Public	For general program support	5,000
Morgan Adams Foundation 5303 E Evans Avenue Denver, CO 80222	Public	For general program support	500
Nebraska Academy of Family Physicians 11920 Burt St Omaha, NE 68154	Public	For general program support	10,000
Nebraska Medical Foundation 233 S 13th Street Lincoln, Ne 68505	Public	For general program support	10,000
Nine Health Services 1139 Delaware St Denver, CO 80204	Public	For general program support	500
Raymond Wentz Foundation 2555 S Downing Street Denver, CO 80210	Public	For general program support	500

COPIC Medical Foundation**Form 990-PF****EIN 84-1197083****12/31/11****Part XV. Supplementary Information**
3. Grants and Contributions Paid During
the Year or Approved for Future Payment**3a.****Grants paid during the year:**

Recipient Name and Address	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
Regis University 3333 Regis Blvd Denver, CO 80221	Public	For general program support	10,000
Rocky Mountain Children's Health Foundation 1719 E 19th Ave Denver, CO 80218	Public	For general program support	500
Summit Foundation PO Box 4000 Breckenridge, CO 80424	Public	For general program support	500
Stapleton 2040 DBA 2040 Partners for Health 7350 East 29th Ave Denver, CO 80238	Public	For general program support	10,000
St Joseph Hospital Foundation 1835 Franklin st Denver, CO 80218	Public	For general program support	1,000
The Leukemia & Lymphoma Society 10832 Old Mill Road Omaha, NE 68154	Public	For general program support	1,000
The Rocky Mountain Cancer Centers Foundation 1161 S VivianSst Lakewood, CO 80228	Public	For general program support	500
The Rocky Mountain Youth Clinic 1601 E 19th avenue Denver, CO 80218	Public	For general program support	500
University of Colorado Health Sciences Center 4200 E. Ninth Avenue Denver, CO 80262	Public	For general program support	40,000
Western Colorado Suicide Prevention Foundation PO Box 775430 Colorado Springs, CO 80477	Public	For general program support	1,000
Zumas Rescue Ranch 7745 N Moore Rd Littleton, Co 80125	Public	For general program support	500
Total Paid:			268,000

COPIC Medical Foundation

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Part XV. Supplementary Information
3. Grants and Contributions Paid During
the Year or Approved for Future Payment

Recipient Name and Address	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
3b.			
Grants approved for future payment:			
Board Directed Donations (Various Charities) 7351 Lowry Boulevard Denver, CO 80230	Public	For general program support	6,000
Cerebral Palsy of Colorado 801 Yosemite Street Denver, CO 80230	Public	For general program support	155,000
Employee Directed Donations (Various Charities) 7351 Lowry Boulevard Denver, CO 80230	Public	For general program support	500
Harold E. Williamson Award -Colorado 7351 Lowry Blvd Denver, CO 80230	Public	For general program support	10,000
Nebraska Medical Association 986360 Nebraska Medical Center Omaha, NE 68198	Public	For general program support	10,000
Rand Institute for Civil Justice 1776 Main Street Santa Monica, CA 90407	Public	For general program support	25,000
University of Colorado Foundation 4740 Walnut Street Boulder, CO 80301	Public	For general program support	25,000
University of Colorado Health Sciences Center 4200 E. Ninth Avenue Denver, CO 80262	Public	For general program support	60,000
Total		Total Approved for Future:	291,500