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Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

2011

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

For calendar year 2011 or tax year beginning

, and ending

Name of foundation JUBITZ FAMILY FOUNDATION		A Employer identification number 93-1324016
Number and street (or P.O. box number if mail is not delivered to street address) 221 N.W. SECOND AVENUE	Room/suite 210	B Telephone number (503) 274-6255
City or town, state, and ZIP code PORTLAND, OR 97209		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 12,117,049. (Part I, column (d) must be on cash basis.)	J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		5,000.		N/A	
2 Check ☐ if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		1,048.	1,048.		STATEMENT 1
4 Dividends and interest from securities		354,429.	354,429.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		-18,721.			
b Gross sales price for all assets on line 6a 2,022,346.					
7 Capital gain net income (from Part IV, line 2)			0.		
8 Net short-term capital gain					
9 Income modifications (gross sales less returns and allowances)					
10a Gross profit or (loss)					
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		341,756.	355,477.		
13 Compensation of officers, directors, trustees, etc		88,000.	17,600.		70,400.
14 Other employee salaries and wages					
15 Pension plans, employee benefits		7,053.	1,411.		5,642.
16a Legal fees					
b Accounting fees STMT 3		3,133.	0.		3,133.
c Other professional fees STMT 4		74,410.	52,519.		21,891.
17 Interest					
18 Taxes STMT 5		4,903.	0.		1,010.
19 Depreciation and depletion					
20 Occupancy		8,890.	1,778.		7,112.
21 Travel, conferences, and meetings		19,699.	3,100.		16,599.
22 Printing and publications					
23 Other expenses STMT 6		20,772.	2,381.		18,391.
24 Total operating and administrative expenses. Add lines 13 through 23		226,860.	78,789.		144,178.
25 Contributions, gifts, grants paid		563,911.			543,911.
26 Total expenses and disbursements. Add lines 24 and 25		790,771.	78,789.		688,089.
27 Subtract line 26 from line 12:		-449,015.			
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)			276,688.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		108,489.	111,140.	111,140.
	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				
	7	Other notes and loans receivable ▶				
		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				
	b	Investments - corporate stock	STMT 8	6,223,505.	4,708,538.	4,708,538.
	c	Investments - corporate bonds	STMT 9	3,748,762.	4,170,068.	4,170,068.
11	Investments - land, buildings, and equipment: basis ▶					
	Less: accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other	STMT 10	2,948,517.	3,127,303.	3,127,303.	
14	Land, buildings, and equipment: basis ▶					
	Less: accumulated depreciation ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers)		13,029,273.	12,117,049.	12,117,049.	
Liabilities	17	Accounts payable and accrued expenses		3,053.	4,908.	
	18	Grants payable			20,000.	
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)		3,053.	24,908.	
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		13,026,220.	12,092,141.	
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ☐ and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, bldg., and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances		13,026,220.	12,092,141.	
	31	Total liabilities and net assets/fund balances		13,029,273.	12,117,049.	

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	13,026,220.
2	Enter amount from Part I, line 27a	2	-449,015.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	12,577,205.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 7	5	485,064.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	12,092,141.

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 INVESTMENTS		P		
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 2,022,346.		2,041,067.	-18,721.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			-18,721.
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	-18,721.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 }	3	N/A

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2010	689,298.	12,215,005.	.056430
2009	660,766.	11,247,031.	.058750
2008	965,806.	13,503,373.	.071523
2007	1,097,480.	14,195,787.	.077310
2006	574,684.	11,978,522.	.047976

2 Total of line 1, column (d)	2	.311989
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	.062398
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	12,608,342.
5 Multiply line 4 by line 3	5	786,735.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,767.
7 Add lines 5 and 6	7	789,502.
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	688,089.

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	5,534.
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	5,534.
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	5,534.
6 Credits/Payments:			
a 2011 estimated tax payments and 2010 overpayment credited to 2011	6a		
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	0.	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	135.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	5,669.	
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?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐		
OR		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► WWW.JUBITZFF.ORG	13	X	
14	The books are in care of ► THE FOUNDATION Telephone no. ► (503) 274-6255 Located at ► 221 N.W. SECOND AVENUE, SUITE 210, PORTLAND, OR ZIP+4 ► 97209			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A	
16	At any time during calendar year 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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No
				X

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

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

		Yes	No
1a During the year did the foundation (either directly or indirectly):			
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	► ☐	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011?		1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If "Yes," list the years ►	☐ Yes ☒ No		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	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. ►			
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.)	N/A	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?		4b	X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

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

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 11		88,000.	7,053.	0.

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

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

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

0

Form 990-PF (2011)

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	12,673,782.
b	Average of monthly cash balances	1b	126,565.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	12,800,347.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	12,800,347.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	192,005.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	12,608,342.
6	Minimum investment return. Enter 5% of line 5	6	630,417.

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	630,417.
2a	Tax on investment income for 2011 from Part VI, line 5	2a	5,534.
b	Income tax for 2011. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	5,534.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	624,883.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	624,883.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	624,883.

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	688,089.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	688,089.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	688,089.

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				624,883.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006				
b From 2007	442,073.			
c From 2008	303,375.			
d From 2009	104,089.			
e From 2010	85,158.			
f Total of lines 3a through e	934,695.			
4 Qualifying distributions for 2011 from Part XII, line 4: ► \$ 688,089.				
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				624,883.
e Remaining amount distributed out of corpus	63,206.			
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	997,901.			
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 instr.			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)	0.			
8 Excess distributions carryover from 2006 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	997,901.			
10 Analysis of line 9:				
a Excess from 2007	442,073.			
b Excess from 2008	303,375.			
c Excess from 2009	104,089.			
d Excess from 2010	85,158.			
e Excess from 2011	63,206.			

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

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 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)

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

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

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).)

M. ALBIN JUBITZ, JR.

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:

SEE STATEMENT 13

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

c Any submission deadlines:

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

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

Recipient	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
Name and address (home or business)				
a Paid during the year				
ALL HANDS RAISED PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
BANDON YOUTH COMMUNITY CENTER BANDON, OR	NONE	509(A)	GENERAL OPERATIONS	2,000.
BARK PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
BIRTH TO THREE EUGENE, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
BLACK PARTENT INITIATIVE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
Total SEE CONTINUATION SHEET(S) ▶ 3a				543,911.
b Approved for future payment				
LATINO NETWORK PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
SPEARFISH FOUNDATION PUBLIC ED SPEARFISH, SD	NONE	509(A)	GENERAL OPERATIONS	5,000.
UO FOUNDATION/ADR CENTER EUGENE, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
Total ▶ 3b				20,000.

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

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.

Sign Here



 4/23/12



Signature of officer or trustee Date Title

May the IRS discuss this return with the preparer shown below (see instr.)?

☐ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
	GARY MCGEE		4/16/12		P00743279
	Firm's name ▶ GARY MCGEE & CO. LLP			Firm's EIN ▶	
	Firm's address ▶ 808 S.W. THIRD AVENUE, SUITE 700 PORTLAND, OR 97204			Phone no. (503) 222-2515	

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

JUBITZ FAMILY FOUNDATION

Employer identification number

93-1324016

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 foundation

Check 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).

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

Name of organization

Employer identification number

JUBITZ FAMILY FOUNDATION**93-1324016****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	M. ALBIN JUBITZ, JR. 611 N.W. SECOND AVENUE, SUITE 210 PORTLAND, OR 97209	\$ 5,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

Employer identification number

93-1324016

(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
	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	_____ _____ _____	\$ _____	_____

Name of organization

Employer identification number

JUBITZ FAMILY FOUNDATION**93-1324016****Part III**

Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once) ► \$

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

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

SOURCE	AMOUNT
CD INTEREST	1,012.
CHECKING INTEREST	36.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	1,048.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDEND INCOME	351,950.	0.	351,950.
INTEREST INCOME	2,479.	0.	2,479.
TOTAL TO FM 990-PF, PART I, LN 4	354,429.	0.	354,429.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
GARY MCGEE & CO. - TAX SERVICES	2,625.	0.		2,625.
LAURA BROWER - PAYROLL SERVICES	508.	0.		508.
TO FORM 990-PF, PG 1, LN 16B	3,133.	0.		3,133.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
U.S. TRUST - INVESTMENT MGMT. FEES	52,519.	52,519.		0.
ERNEST BLOCH - CONSULTING SERVICES	4,493.	0.		4,493.
PATRICK HILLER- WAR PREVENTION INITIATIVE CONSULTING	17,398.			

		0.	17,398.
TO FORM 990-PF, PG 1, LN 16C	74,410.	52,519.	21,891.

FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX ON INVESTMENT INCOME	3,893.	0.		0.
OREGON CHARITY REGISTRATION FEES	1,010.	0.		1,010.
TO FORM 990-PF, PG 1, LN 18	4,903.	0.		1,010.

FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INTERNET	795.	116.		679.
TELEPHONE	1,340.	268.		1,072.
LICENSES AND PERMITS	200.	40.		160.
POSTAGE AND DELIVERY	47.	9.		38.
OFFICE SUPPLIES	446.	89.		357.
OTHER	107.	21.		86.
PROGRAM EXPENSES	8,648.	0.		8,648.
PAYROLL TAXES	7,239.	1,448.		5,791.
DUES AND SUBSCRIPTIONS	1,950.	390.		1,560.
TO FORM 990-PF, PG 1, LN 23	20,772.	2,381.		18,391.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	7
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DESCRIPTION	AMOUNT
NET DECREASE IN THE FAIR VALUE OF INVESTMENTS	485,064.
TOTAL TO FORM 990-PF, PART III, LINE 5	485,064.

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
EQUITY SECURITIES	4,708,538.	4,708,538.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	4,708,538.	4,708,538.	

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
FIXED INCOME SECURITIES	4,170,068.	4,170,068.	
TOTAL TO FORM 990-PF, PART II, LINE 10C	4,170,068.	4,170,068.	

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	10
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
OTHER SECURITIES	FMV	157,466.	157,466.
CASH EQUIVALENTS	FMV	402,047.	402,047.
REAL ESTATE/ALTERNATIVE INVESTMENTS	FMV	2,567,790.	2,567,790.
TOTAL TO FORM 990-PF, PART II, LINE 13		3,127,303.	3,127,303.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
BOYS AND GIRLS CLUB - WESTERN LANE COUNTY FLORENCE, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
BOYS AND GIRLS CLUBS OF CENTRAL OREGON BEND, OR	NONE	509(A)	GENERAL OPERATIONS	4,000.
CASA FOR CHILDREN PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
CASA OF CENTRAL OREGON BEND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
CASA OF LANE CO. SPRINGFIELD, OR	NONE	509(A)	GENERAL OPERATIONS	2,500.
CENTER FOR EARTH LEADERSHIP PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	4,000.
CENTER FOR ENVIRONMENTAL EQUITY PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	3,900.
CHILDREN FIRST FOR OREGON PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	3,011.
CHILDREN'S CENTER OREGON CITY, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
CHILDREN'S JUSTICE ALLIANCE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
Total from continuation sheets				521,911.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
CHILDREN'S MUSEUM OF EASTERN OREGON PENDLETON, OR	NONE	509(A)	GENERAL OPERATIONS	3,000.
COLUMBIA GORGE CASA HOOD RIVER, OR	NONE	509(A)	GENERAL OPERATIONS	2,500.
COLUMBIA GORGE CHILDREN'S ADVOCACY CENTER HOOD RIVER, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
COLUMBIA LAND TRUST VANCOUVER, WA	NONE	509(A)	GENERAL OPERATIONS	10,000.
COMMUNITY TRANSITIONAL SCHOOL PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
CONCORDIA UNIVERSITY PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	4,500.
COOS-DOUGLAS NEIGHBOR TO NEIGHBOR NORTH BEND, OR	NONE	509(A)	GENERAL OPERATIONS	2,000.
ECOTRUST PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
EPIPHANY SCHOOL DORCHESTER, MA	NONE	509(A)	GENERAL OPERATIONS	5,000.
FAMILIES FIRST PARENT RESOURCE CENTER JOHN DAY, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
FAMILY RELIEF NURSERY COTTAGE GROVE, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
FAMILY STEPPING STONES GLADSTONE, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
FOREST PARK CONSERVANCY PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
FRIENDS OF TREES PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
GIFFORD PINCHOT TASK FORCE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
HELLS CANYON PRESERVATION COUNCIL LA GRANDE, OR	NONE	509(A)	GENERAL OPERATIONS	7,500.
ILLINOIS VALLEY S&W CONSERVATION DISTRICT CAVE JUNCTION, OR	NONE	509(A)	GENERAL OPERATIONS	7,500.
IMPACT NORTHWEST PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
JOHNSON CREEK WATERSHED COUNCIL PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
KINSHIP HOUSE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	2,500.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
KLAMATH-SISKIYOU WILDLANDS CENTER ASHLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
LINNTON COMMUNITY CENTER PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	3,000.
LITTLE FEET COOPERATIVE SCHOOL HOOD RIVER, OR	NONE	509(A)	GENERAL OPERATIONS	2,500.
MASLOW PROJECT MEDFORD, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
METROPOLITAN FAMILY SERVICES PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
MORRISON CHILD & FAMILY SERVICES PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	20,000.
MORRISON CHILD & FAMILY SERVICES PORTLAND, OR	NONE	509(A)	RETURN OF A GRANT	-12,250.
MOUNTAINSTAR FAMILY RELIEF NURSERY BEND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
NATIVE AMERICAN YOUTH & FAMILY CENTER PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
NATIVE FISH SOCIETY OREGON CITY, OR	NONE	509(A)	GENERAL OPERATIONS	15,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
NORTHWEST EARTH INSTITUTE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
NORTHWEST YOUTH CORPS EUGENE, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
OR PHYSICANS FOR SOCIAL RESPONSIBILITY PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
OREGON ENVIRONMENTAL COUNCIL PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
OREGON NATURAL DESERT ASSOCIATION BEND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
OREGON WILD PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
OUTWARD BOUND PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
OUTWARD BOUND PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
PACIFIC CREST TRAIL ASSOC. SACRAMENTO, CA	NONE	509(A)	GENERAL OPERATIONS	10,000.
PARENT ENHANCEMENT PROGRAM CORVALLIS, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
PEACEVOICE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	11,000.
PEACEVOICE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
PENINSULA CHILDREN'S CENTER PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
PORTLAND CHILDREN'S MUSEUM PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	15,000.
PORTLAND PUBLIC SCHOOLS PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	15,000.
PORTLAND READING FOUNDATION PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
RESOLUTIONS NORTHWEST PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
RISING STARS PRESCHOOL LA PINE, OR	NONE	509(A)	GENERAL OPERATIONS	2,000.
ROTARY DISTRICT 5100 WILSONVILLE, OR	NONE	509(A)	GENERAL OPERATIONS	15,000.
SCIENCEWORKS HANDS ON MUSEUM ASHLAND, OR	NONE	509(A)	GENERAL OPERATIONS	1,250.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
SMART PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
SOLV HILLSBORO, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
SPEARFISH FOUNDATION PUBLIC ED SPEARFISH, SD	NONE	509(A)	GENERAL OPERATIONS	5,000.
STAND FOR CHILDREN PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
SVP PORTLAND PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
THE CHILDREN'S INSTITUTE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
TREASURE VALLEY RELIEF NURSERY ONTARIO, OR	NONE	509(A)	GENERAL OPERATIONS	3,000.
TROUT UNLIMITED ARLINGTON, VA	NONE	509(A)	GENERAL OPERATIONS	7,000.
UNITED WAY LANE CO. SPRINGFIELD, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
WATERWATCH OF OREGON PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
WESTERN RIVERS CONSERVANCY PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	10,000.
WHOLISTIC PEACE INSTITUTE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	15,000.
WHOLISTIC PEACE INSTITUTE PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	20,000.
WILLAMETTE RIVERKEEPER PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
WOLFTREE SISTERS, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
WORLD AFFAIRS COUNCIL OF OREGON PORTLAND, OR	NONE	509(A)	GENERAL OPERATIONS	5,000.
YAMHILL COUNTY CASA MCMINNVILLE, OR	NONE	509(A)	GENERAL OPERATIONS	2,500.
Total from continuation sheets				

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT 11
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
M. ALBIN JUBITZ, JR. 221 N.W. SECOND AVENUE, SUITE 210 PORTLAND, OR 97209	PRESIDENT 10.00	0.	0.	0.
ELIZABETH JUBITZ SAYLER 221 N.W. SECOND AVENUE, SUITE 210 PORTLAND, OR 97209	VICE PRESIDENT 2.00	1,000.	0.	0.
SARAH C. JUBITZ 221 N.W. SECOND AVENUE, SUITE 210 PORTLAND, OR 97209	TREASURER 2.00	1,000.	0.	0.
KATHERINE H. JUBITZ 221 N.W. SECOND AVENUE, SUITE 210 PORTLAND, OR 97209	SECRETARY 2.00	1,000.	0.	0.
RAYMOND G. JUBITZ 221 N.W. SECOND AVENUE, SUITE 210 PORTLAND, OR 97209	EXECUTIVE DIREC 40.00	85,000.	7,053.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		88,000.	7,053.	0.

FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT 12
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ACTIVITY ONE

WAR PREVENTION INITIATIVE -

1. DEVELOP AN EFFECTIVE STRATEGY TO CONVINCE AMERICANS THAT THE U.S. SHOULD NOT PROMOTE WAR, MILITARISM, AND WEAPONS PROLIFERATION, AND RATHER EMBRACE CONFLICT RESOLUTION PRACTICES THAT HAVE BEEN SHOWN TO PREVENT, SHORTEN, AND ELIMINATE WAR AS A VIABLE SOLUTION TO GLOBAL, REGIONAL, AND LOCAL CONFLICTS;
2. FACILITATING ANNUAL OR BI-ANNUAL MEETINGS TO DISCUSS NEW IDEAS AND PROJECTS OF STRATEGIC WAR PREVENTION;
3. DEVELOP A SIGNIFICANT ROLE FOR ROTARY INTERNATIONAL IN GLOBAL WAR PREVENTION EFFORTS ("EARLY WARNING SYSTEM");
4. CREATE A COALITION OF NATIONAL AND INTERNATIONAL ACADEMIC

AND NON-ACADEMIC EXPERTS WHO WE CAN ENGAGE IN ONGOING
CONSTRUCTIVE DIALOG ON WAR PREVENTION ISSUES;
5. INITIATE A HUB FOR WAR PREVENTION EFFORTS;
6. IDENTIFY FUNCTIONS TO PREVENT WAR;
7. CONSTANTLY EDUCATING OURSELVES ON STATE-OF-ART KNOWLEDGE
RELATED TO WAR PREVENTION;
8. WRITING REFLECTION PAPERS AND CREATING REPORTS FOR SELF
AND PUBLIC AWARENESS.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 1

24,298.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 13

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

MR. RAYMOND JUBITZ, EXECUTIVE DIRECTOR
211 N.W. SECOND AVENUE, SUITE 210
PORTLAND, OR 97209

TELEPHONE NUMBER

(503) 274-6255

FORM AND CONTENT OF APPLICATIONS

I. LETTER OF INQUIRY ("LOI")- APPLICANTS MUST FIRST COMPLETE AN LOI THAT PROVIDES A SUMMARY OF THE GRANT REQUEST. THE LOI FORM CAN BE FOUND ON THE THE FOUNDATION'S WEBSITE.

II. SITE VISIT- ON APPROVAL OF AN LOI, A SITE VISIT WILL BE SCHEDULED. FOLLOWING THE SITE VISIT, THE APPLICANTS WILL BE NOTIFIED AS TO WHETHER THEY SHOULD SUBMIT A GRANT APPLICATION.

III. GRANT APPLICATION- THE APPLICATION FORM CAN BE FOUND ON THE FOUNDATION'S WEBSITE AND REQUIRES THE FOLLOWING INFORMATION: A DETAILED PROGRAM BUDGET WITH ALL SOURCES OF INCOME; ANTICIPATED OUTCOMES OF THE PROJECT/PROGRAM AND HOW THEY WILL BE MEASURED AND EVALUATED; A LIST OF THE BOARD OF DIRECTORS; A LIST OF CURRENT MAJOR DONORS; A COPY OF THE ORGANIZATION'S IRS DETERMINATION LETTER; AND THE ORGANIZATION'S MOST CURRENT FINANCIAL STATEMENTS AND 990.

ANY SUBMISSION DEADLINES

GRANT REQUESTS MUST BE RECEIVED THREE MONTHS AHEAD OF THE APRIL 1 AND OCTOBER 1 GRANT DEADLINES.

RESTRICTIONS AND LIMITATIONS ON AWARDS

EARLY CHILDHOOD DEVELOPMENT AND YOUTH EDUCATION, WITH AN EMPHASIS ON CHILDREN AT-RISK.
ENVIRONMENTAL STEWARDSHIP, WITH AN EMPHASIS ON RIVERS AND THEIR WATERSHED ECOSYSTEMS.
PEACEMAKING ACTIVITIES, WITH AN EMPHASIS ON TEACHING PEACE AND CONFLICT RESOLUTION.