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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2011

For calendar year 2011, or tax year beginning 07-01-2011 , and ending 06-30-2012

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

Name of foundation
ROSE E TUCKER DECD CHARITABLE 97309080

A Employer identification number
93-6119091

Number and street (or P O box number if mail is not delivered to street address)
P O BOX 3168

Room/suite

B Telephone number (see page 10 of the instructions)
(503) 275-4327

City or town, state, and ZIP code
PORTLAND, OR 97208

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐

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

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16)**\$** 19,881,987

J Accounting method ☐ Cash ☐ Accrual
☐ Other (specify) _____
(Part I, column (d) must be on cash basis.)

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

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	391,056	391,056		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	25,877			
	b Gross sales price for all assets on line 6a _____ 2,362,960				
	7 Capital gain net income (from Part IV, line 2)		25,877		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	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	416,933	416,933		
	13 Compensation of officers, directors, trustees, etc	175,416	131,562		43,854
	14 Other employee salaries and wages		0	0	0
	15 Pension plans, employee benefits		0	0	
	16a Legal fees (attach schedule).	24,930	0	0	24,930
	b Accounting fees (attach schedule).	2,000	0	0	2,000
	c Other professional fees (attach schedule)				0
	17 Interest				0
	18 Taxes (attach schedule) (see page 14 of the instructions)	16,221	7,500		0
	19 Depreciation (attach schedule) and depletion	0	0		
	20 Occupancy				
	21 Travel, conferences, and meetings		0	0	
	22 Printing and publications		0	0	
	23 Other expenses (attach schedule).	5,903			5,903
	24 Total operating and administrative expenses. Add lines 13 through 23	224,470	139,062	0	76,687
	25 Contributions, gifts, grants paid.	1,060,900			1,060,900
	26 Total expenses and disbursements. Add lines 24 and 25	1,285,370	139,062	0	1,137,587
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-868,437			
	b Net investment income (if negative, enter -0-)		277,871		
	c Adjusted net income (if negative, enter -0-)			0	

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Cat No 11289X

Form **990-PF** (2011)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	395,968	638,606	638,606
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____		0	0
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____ 0			
	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)	12,344,498	11,971,602	13,291,526
	c	Investments—corporate bonds (attach schedule).	6,486,828	5,753,649	5,951,855
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			0
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
Liabilities	15	Other assets (describe ▶ _____)			
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	19,227,294	18,363,857	19,881,987
	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
Net Assets or Fund Balances	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
		Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	19,227,294	18,363,857	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	19,227,294	18,363,857	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	19,227,294	18,363,857	

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	19,227,294
2	Enter amount from Part I, line 27a	2	-868,437
3	Other increases not included in line 2 (itemize) ▶ _____	3	5,000
4	Add lines 1, 2, and 3	4	18,363,857
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	18,363,857

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	See Additional Data Table		
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a	See Additional Data Table		
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	25,877
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8	}	3	

Part V

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries			
(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2010	1,392,711	20,376,784	0 068348
2009	1,050,255	19,310,417	0 054388
2008	1,123,067	17,916,176	0 062685
2007	1,368,340	24,148,912	0 056663
2006	1,091,906	24,140,182	0 045232

2	Total of line 1, column (d).	2	0 287316
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	0 057463
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5.	4	19,564,875
5	Multiply line 4 by line 3.	5	1,124,256
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	2,779
7	Add lines 5 and 6.	7	1,127,035
8	Enter qualifying distributions from Part XII, line 4.	8	1,137,587

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions on page 18

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

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1			
		Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	2,779
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	2,779
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	2,779
6		Credits/Payments			
a		2011 estimated tax payments and 2010 overpayment credited to 2011	6a	8,670	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c	0	
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments Add lines 6a through 6d.		7	8,670
8		Enter any penalty for underpayment of estimated tax Check here ☐ 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	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	5,891
11		Enter the amount of line 10 to be Credited to 2012 estimated tax ☐ 2,780	Refunded ☐	11	3,111

Part VII-AStatements 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		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?			No
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ _____ (2) On foundation managers ☐ \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		No
	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
	If "Yes," attach the statement required by General Instruction T.			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either			
	• By language in the governing instrument, or			
	• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ☐ 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 .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address				
14	The books are in care of US BANK Telephone no (503) 275-4327 Located at 555 SW OAK PORTLAND OR ZIP+4 97204			
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.			
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?	15		
	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

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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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).			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If "Yes," list the years 20 , 20 , 20 , 20			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions).	2b		No
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?			
b	If "Yes," did it have excess business holdings in 2011 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No		
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions).	☐ Yes ☒ No		
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	☒	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? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>	☐ Yes ☐ No		
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? <i>If "Yes" to 6b, file Form 8870.</i>		6b	No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No		
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b	

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
US BANK	CO-TRUSTEE	153,416		
PO BOX 3168 PORTLAND, OR 97208	1			
MILO E ORMSETH	CO-TRUSTEE	12,000		
900 SW 5TH AVENUE PORTLAND, OR 97204	1			
TERRY PANCOAST	CO-TRUSTEE	12,000		
900 SW 5TH AVENUE SUITE 2600 PORTLAND, OR 97204	1			
2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
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 page 23 of the instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
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	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see page 23 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3.	

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	19,487,120
b	Average of monthly cash balances.	1b	375,697
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	19,862,817
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	19,862,817
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	297,942
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	19,564,875
6	Minimum investment return. Enter 5% of line 5.	6	978,244

Part XI

Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	978,244
2a	Tax on investment income for 2011 from Part VI, line 5.	2a	2,779
b	Income tax for 2011 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,779
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	975,465
4	Recoveries of amounts treated as qualifying distributions.	4	5,000
5	Add lines 3 and 4.	5	980,465
6	Deduction from distributable amount (see page 25 of the instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	980,465

Part XII

Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	1,137,587
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,137,587
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	2,779
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,134,808
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see page 26 of the instructions)

		(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1	Distributable amount for 2011 from Part XI, line 7				980,465
2	Undistributed income, if any, as of the end of 2011				
a	Enter amount for 2010 only.			0	
b	Total for prior years 2009 , 20__ , 20__		0		
3	Excess distributions carryover, if any, to 2011				
a	From 2006.				0
b	From 2007.				4,930
c	From 2008.				238,268
d	From 2009.				92,102
e	From 2010.				381,342
f	Total of lines 3a through e.	716,642			
4	Qualifying distributions for 2011 from Part XII, line 4 ▶ \$ 1,137,587				
a	Applied to 2010, but not more than line 2a			0	
b	Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c	Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .	0			
d	Applied to 2011 distributable amount.				980,465
e	Remaining amount distributed out of corpus	157,122			
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	873,764			
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 page 27 of the instructions . . .		0		
e	Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
f	Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011				0
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions).	0			
8	Excess distributions carryover from 2006 not applied on line 5 or line 7 (see page 27 of the instructions).	0			
9	Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	873,764			
10	Analysis of line 9				
a	Excess from 2007. . . .				4,930
b	Excess from 2008. . . .				238,268
c	Excess from 2009. . . .				92,102
d	Excess from 2010. . . .				381,342
e	Excess from 2011. . . .				157,122

Part XIV

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

1a

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

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	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 organization had \$5,000 or more in assets at any time during the year—see page 27 of the instructions.)

1

Information Regarding Foundation Managers:

a

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

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

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a

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

ROSE E TUCKER CHARITABLE TRUST
900 SW FIFTH AVENUE SUITE 2600
PORTLAND, OR 97204
(503) 294-9558

b

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

CONTACT ABOVE - ROSE E TUCKER CHARITABLE TRUST

c

Any submission deadlines

NO DEADLINES

d

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

PRIORITY TO PROGRAMS IN EDUCATION, HEALTH & WELFARE, COMMUNITY DEVELOPMENT, SOCIAL SERVICE & ARTS & CULTURE, EMPHASIS IN THE PORTLAND METROPOLITAN AREA

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 See Additional Data Table				
Total			3a	1,060,900
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities. . . .			14	391,056	
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			18	25,877	
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). .				416,933	
13 Total. Add line 12, columns (b), (d), and (e).			13		416,933

[illegible]

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?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.			No
(2) Other assets.			No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.			No
(2) Purchases of assets from a noncharitable exempt organization.			No
(3) Rental of facilities, equipment, or other assets.			No
(4) Reimbursement arrangements.			No
(5) Loans or loan guarantees.			No
(6) Performance of services or membership or fundraising solicitations.			No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.			No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received			

[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		
Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge					
	*****		2012-10-22		*****	
	Signature of officer or trustee		Date		Title	
	Paid Preparer's Use Only	Preparer's Signature		Date	Check if self-employed ☐	PTIN
		Firm's name			Firm's EIN	
		Firm's address			Phone no	

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

Additional Data

Software ID:

Software Version:

EIN: 93-6119091

Name: ROSE E TUCKER DECD CHARITABLE 97309080

Form 990PF - Special Condition Description:

Special Condition Description

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

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
MOTOROLA INC			2011-08-09
3243 175 NUVEEN MID CAP GRWTH OPP FD CL I		2003-05-20	2011-09-13
11349 96 NUVEEN SMALL CAP SELECT FD CL I		2002-03-19	2011-09-13
56270 711 NUVEEN INTERMEDIATE TERM B CL I		2003-05-23	2011-10-28
60739 53 EATON VANCE LARGE CAP VAL I		2006-05-04	2012-04-05
13224 903 NUVEEN INTERMEDIATE TERM B CL I		2003-05-23	2012-06-22
8968 772 NUVEEN SMALL CAP SELECT FD CL I		2002-03-19	2012-06-22

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
51			51
138,873		98,041	40,832
141,648		171,725	-30,077
588,592		593,656	-5,064
1,139,474		1,198,440	-58,966
140,448		139,523	925
127,088		135,698	-8,610

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			51
			40,832
			-30,077
			-5,064
			-58,966
			925
			-8,610

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
BLANCHET HOUSE OF HOSPITALITY340 NW GLISAN PORTLAND,OR 97209	NONE	PUBLIC	GENERAL SUPPORT	10,000
COLUMBIA RIVER MARITIME MUSEUM INC1792 MARINE DRIVE ASTORIA,OR 97103	NONE	PUBLIC	GENERAL SUPPORT	15,000
FRIENDS OF TRYON CREEK STATE PARK111321 SWTERWILLIGER BLVD PORTLAND,OR 97219	NONE	PUBLIC	GENERAL SUPPORT	2,000
JAPANESE GARDEN SOCIETY OF OREGONPO BOX 3847 PORTLAND,OR 97208	NONE	PUBLIC	GENERAL SUPPORT	3,000
PORTLAND CLASSICAL CHINESE GARDENPO BOX 3706 PORTLAND,OR 97209	NONE	PUBLIC	GENERAL SUPPORT	3,000
THE OLD CHURCH INC1422 SW 11TH AVE PORTLAND,OR 97201	NONE	PUBLIC	GENERAL SUPPORT	3,500
MEDIA ARTS & TECHNOLOGY INSTITUTE2715 N EMERSON ST PORTLAND,OR 97217	NONE	PUBLIC	GENERAL SUPPORT	3,000
OREGON RAIL HERITAGE FOUNDATIONPO BOX 42443 PORTLAND,OR 97242	NONE	PUBLIC	GENERAL SUPPORT	5,000
CLACKAMAS VOLUNTEERS IN MEDICINEPO BOX 2592 OREGON CITY,OR 97405	NONE	PUBLIC	GENERAL SUPPORT	5,000
THE CAMPBELL INSTITUTE DBA CHILDREN'S INSTITUTE1221 SW YAMHILL STREET SUITE 260 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	10,000
METROARTS INC0240 SW CANBY STREET PORTLAND,OR 97219	NONE	PUBLIC	GENERAL SUPPORT	6,000
OREGON TRAIL LIBRARY DISTRICTPO BOX 107 BOARDMAN,OR 97818	NONE	PUBLIC	GENERAL SUPPORT	10,000
CARLTON TOGETHER CARESPO BOX 821 CARLTON,OR 97111	NONE	PUBLIC	GENERAL SUPPORT	1,500
THE CHIRDREN'S BOOK BANK2680 SW RAVENSVIEW DRIVE PORTLAND,OR 97201	NONE	PUBLIC	GENERAL SUPPORT	5,000
COMPREHENSIVE OPTIONS FOR DRUG ABUSERS1027 E BURNSIDE STREET PORTLAND,OR 97214	NONE	PUBLIC	GENERAL SUPPORT	5,000
NEIGHBORHOOD HOUSE INC7780 SW CAPITOL HWY PORTLAND,OR 97219	NONE	PUBLIC	GENERAL SUPPORT	7,500
PORTLAND HABITAT FOR HUMANITYPO BOX 11527 PORTLAND,OR 97211	NONE	PUBLIC	GENERAL SUPPORT	5,000
SERENDIPTIY CENTER INCPO BOX 33350 PORTLAND,OR 97292	NONE	PUBLIC	GENERAL SUPPORT	3,000
VERNONIA EDUCATION FOUNDATION475 BRIDGE STREET VERNONIA,OR 97064	NONE	PUBLIC	GENERAL SUPPORT	10,000
PORTLAND READING FOUNDATIONPO BOX 80516 PORTLAND,OR 97280	NONE	PUBLIC	GENERAL SUPPORT	5,000
REHAB'S SISTERSPO BOX 22443 MILWAUKIE,OR 97269	NONE	PUBLIC	GENERAL SUPPORT	1,500
THE FRIENDS OF CRESTON CHILDREN'S DENTAL CLINIC4701 SE BUSH STREET PORTLAND,OR 97206	NONE	PUBLIC	GENERAL SUPPORT	3,000
OREGON ALLIANCE OF INDEPENDENT COLLEGES & UNIVERSITIES16101 SW 72ND AVE SUITE 100 PORTLAND,OR 97224	NONE	PUBLIC	GENERAL SUPPORT	10,000
NATIVE AMERICAN YOUTH & FAMILY CTR5135 NE COLUMBIA BLVD PORTLAND,OR 97218	NONE	PUBLIC	GENERAL SUPPORT	2,500
ADELANTE MUJERES2420 19TH AVE FOREST GROVE,OR 97116	NONE	PUBLIC	GENERAL SUPPORT	2,500
ALBERTINA KERR CENTERS FOUNDATION424 NE 22ND AVENUE PORTLAND,OR 97232	NONE	PUBLIC	GENERAL SUPPORT	2,500
AMERICAN LAND INSTITUTE534 SW 3RD AVENUE SUITE 716 PORTLAND,OR 97204	NONE	PUBLIC	GENERAL SUPPORT	8,000
ARTISTS REPERTORY THEATRE 1515 SW MORRISON STREET PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	6,000
BIG BROTHERS BIG SISTERS NORTHWEST1827 NE 44TH AVENUE SUITE 100 PORTLAND,OR 97213	NONE	PUBLIC	GENERAL SUPPORT	5,000
BIRCH COMMUNITY SERVICES INC17780 NE SAN RAFAEL PORTLAND,OR 97230	NONE	PUBLIC	GENERAL SUPPORT	7,000

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
BEINSTAR220 SE 12TH SUITE A-100 HILSBORO,OR 97123	NONE	PUBLIC	GENERAL SUPPORT	3,000
BOYS & GIRLS CLUBS OF PORTLAND METROPOLITAN AREAPO BOX 820127 PORTLAND,OR 97282	NONE	PUBLIC	GENERAL SUPPORT	5,000
BROADWAY ROSE THEATER COMPANYPO BOX 231004 TIGARD,OR 97281	NONE	PUBLIC	GENERAL SUPPORT	1,500
CAMP FIRE COLUMBIA619 SW 11TH AVE SUITE 234 PORLTAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	3,000
CAPPELLA ROMANA3131 NE GLISAN STREET PORTLAND,OR 97232	NONE	PUBLIC	GENERAL SUPPORT	3,500
CASA FOR CHILDREN INC1401 NE 68TH AVENUE PORTLAND,OR 97213	NONE	PUBLIC	GENERAL SUPPORT	7,500
CHAMBER MUSIC NORTHWEST INC522 SW 5TH AVENUE SUITE 920 PORTLAND,OR 97204	NONE	PUBLIC	GENERAL SUPPORT	7,500
CHESS FOR SUCCESS2701 NW VAUGHN STREET SUITE 101 PORTLAND,OR 97201	NONE	PUBLIC	GENERAL SUPPORT	3,500
CLASSROOM LAW PROJECT620 SW MAIN STREET SUITE 102 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	3,500
CLASSIC GREEK THEATER INCPO BOX 23908 PORTLAND,OR 97281	NONE	PUBLIC	GENERAL SUPPORT	2,500
COMMUNITY MUSIC CENTER INC 3350 SE FRANCIS STREET PORTLAND,OR 97202	NONE	PUBLIC	GENERAL SUPPORT	5,000
COMMUNITY TRANSITIONAL SCHOOL6601 NE KILLINGSWORTH ST PORTLAND,OR 97218	NONE	PUBLIC	GENERAL SUPPORT	10,000
CHILDREN'S RELIEF NURSERY 8425 N LOMBARD ST PORTLAND,OR 97203	NONE	PUBLIC	GENERAL SUPPORT	3,500
DENTAL FOUNDATION OF OREGONPO BOX 2448 WILSONVILLE,OR 97070	NONE	PUBLIC	GENERAL SUPPORT	5,000
DE PAUL INDUSTRIES4950 NE MARTIN LUTHER KING JR BLVD PORTLAND,OR 97211	NONE	PUBLIC	GENERAL SUPPORT	4,000
DRESS FOR SUCCESS1532 B NE 37TH AVE PORTLAND,OR 97232	NONE	PUBLIC	GENERAL SUPPORT	2,500
ECOTRUST721 NW 9TH AVENUE SUITE 200 PORTLAND,OR 97209	NONE	PUBLIC	GENERAL SUPPORT	15,000
ECUMENICAL MINISTRIES OF OREGON INTERCHURCH CENTER SUITE B 0245 SW BANCROFT STREET PORTLAND,OR 97239	NONE	PUBLIC	GENERAL SUPPORT	3,000
ETHOS INC10 N KILLINGSWORTH STREET PORTLAND,OR 97217	NONE	PUBLIC	GENERAL SUPPORT	5,000
FISHTRAP INCPO BOX 38 ENTERPRISE,OR 97828	NONE	PUBLIC	GENERAL SUPPORT	1,000
FOCUS ON YOUTH2626 NE 12TH AVENUE PORTLAND,OR 97212	NONE	PUBLIC	GENERAL SUPPORT	2,500
FRIENDS OF THE CHILDREN-PORTLAND44 NE MORRIS STREET PORTLAND,OR 97212	NONE	PUBLIC	GENERAL SUPPORT	6,500
HOMOWO AFRICAN ARTS AND CULTURES7725 N FOWLER AVE PORTLAND,OR 97217	NONE	PUBLIC	GENERAL SUPPORT	1,000
HOUSING DEVELOPMENT CENTER 847 NE 19TH AVE PORTLAND,OR 97232	NONE	PUBLIC	GENERAL SUPPORT	2,500
HUMAN SOLUTIONS12350 SE POWELL PORTLAND,OR 97236	NONE	PUBLIC	GENERAL SUPPORT	5,000
I HAVE A DREAM FDN - OREGON 1478 NE KILLINGSWORTH ST 1ST FLOOR PORTLAND,OR 97211	NONE	PUBLIC	GENERAL SUPPORT	15,000
INNOVATIVE HOUSING INC219 NW SECOND AVE PORTLAND,OR 97209	NONE	PUBLIC	GENERAL SUPPORT	7,000
INTERVARSITY CHRISTIAN FELLOWSHIP7039 NE RODNEY CT PORTLAND,OR 97211	NONE	PUBLIC	GENERAL SUPPORT	1,500
LUTHERAN COMMUNITY SERVICES NW3800 SW CEDAR HILLS BLVD 230 BEAVERTON,OR 97005	NONE	PUBLIC	GENERAL SUPPORT	7,500
LEAGUE OF WOMEN VOTERS OF OREGON EDUCATION FUND1330 12TH ST SE SUITE 200 SALEM,OR 97302	NONE	PUBLIC	GENERAL SUPPORT	6,500

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
LEWIS AND CLARK COLLEGE0615 SW PALATINE HILL ROAD PORTLAND,OR 97219	NONE	COLLEGE	GENERAL SUPPORT	50,000
LOAVES AND FISHES CENTERS INCPO BOX 19477 PORTLAND,OR 97280	NONE	PUBLIC	GENERAL SUPPORT	5,000
METROPOLITAN FAMILY SERVICE1808 SE BELMONT PORTLAND,OR 97214	NONE	PUBLIC	GENERAL SUPPORT	5,000
METROPOLITAN YOUTH SYMPHONY4800 SW MACADAM SUITE 105 PORTLAND,OR 97239	NONE	PUBLIC	GENERAL SUPPORT	1,500
MINDS MATTERPO BOX 820023 PORTLAND,OR 97282	NONE	PUBLIC	GENERAL SUPPORT	3,500
MIRACLE THEATRE GROUP425 SE 6TH AVENUE PORTLAND,OR 97214	NONE	PUBLIC	GENERAL SUPPORT	2,000
MEDICAL TEAMS INTERNATIONAL PO BOX 10 PORTLAND,OR 97207	NONE	PUBLIC	GENERAL SUPPORT	10,000
NATIONAL FOUNDATION OF DENTISTRY FOR THE HANDICAPPEDPO BOX 3710 PORTLAND,OR 97070	NONE	PUBLIC	GENERAL SUPPORT	2,000
NATURAL RESOURCES DEFENSE COUNCIL111 SUTTER STREET 20TH FLOOR SAN FRANCISCO,CA 94104	NONE	PUBLIC	GENERAL SUPPORT	22,500
NATURE CONSERVANCY INC821 SE 14TH AVE PORTLAND,OR 97214	NONE	PUBLIC	GENERAL SUPPORT	25,000
NEW AVENUES FOR YOUTH INC1220 SW COLUMBIA STREET PORTLAND,OR 97201	NONE	PUBLIC	GENERAL SUPPORT	3,500
NORTHWEST ACADEMY1130 SW MAIN PORTAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	8,000
NORTHWEST EARTH INSTITUTE107 SE WASHINGTON STREET 235 PORTLAND,OR 97214	NONE	PUBLIC	GENERAL SUPPORT	3,000
NORTHWEST PILOT PROJECT INC1430 SW BROADWAY SUITE 200 PORTLAND,OR 97201	NONE	PUBLIC	GENERAL SUPPORT	2,000
NORTHWEST YOUTH CORPS2621 AUGUSTA STREET EUGENE,OR 97403	NONE	PUBLIC	GENERAL SUPPORT	2,000
NORTHWEST PROFESSIONAL DANCE PROJECTPO BOX 42488 PORTLAND,OR 97242	NONE	PUBLIC	GENERAL SUPPORT	3,000
OREGON OUTREACH INC MCCOY ACADEMY3802 NE MARTIN LUTHER KING JR BLVD PORTLAND,OR 97212	NONE	PUBLIC	GENERAL SUPPORT	2,500
OPAL CREEK ANCIENT FOREST CENTER CREEK1220 SW MORRISON SUITE 527 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	5,000
OPEN MEADOW ALTERNATIVE SHCOOLS INC7621 NORTH WABASH AVENUE PORTLAND,OR 97217	NONE	PUBLIC	GENERAL SUPPORT	3,500
OREGON BALLET818 SE 6TH AVE PORTLAND,OR 97214	NONE	PUBLIC	GENERAL SUPPORT	25,000
OREGON CHILDREN'S FOUNDATION101 SW MARKET STREET PORTLAND,OR 97201	NONE	PUBLIC	GENERAL SUPPORT	25,000
OREGON CHILDREN'S THEATER600 SW 10TH AVE SUITE 313 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	1,500
OREGON COAST AQUARIUM2820 SE FERRY SLIP ROAD NEWPORT,OR 97365	NONE	PUBLIC	GENERAL SUPPORT	7,500
OREGON COUNCIL FOR THE HUMANITIES813 SW ALDER ST SUITE 702 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	6,500
OREGON HISTORICAL SOCIETY1200 SW PARK AVE PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	8,400
OREGON MUSEUM OF SCIENCE AND INDUSTRY1945 SE WATER AVENUE PORTLAND,OR 97214	NONE	PUBLIC	GENERAL SUPPORT	20,000
OREGON SHAKESPEAREAN FESTIVAL ASSOCPO BOX 158 15 SOUTH PIONEER ST ASHLAND,OR 97520	NONE	PUBLIC	GENERAL SUPPORT	7,500
OREGON SYMPHONY ASSOCIATION921 SW WASHINGTON SUITE 200 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	40,000
OUR HOUSE OF PORTLAND2727 SE ALDER ST PORTLAND,OR 97214	NONE	PUBLIC	GENERAL SUPPORT	2,500
OREGON ZOO FOUNDATION4001 SW CANYON ROAD PORTLAND,OR 97221	NONE	PUBLIC	GENERAL SUPPORT	10,000

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
PORTLAND CHAMBER ORCHESTRA ASSNPO BOX 9024 PORTLAND,OR 97207	NONE	PUBLIC	GENERAL SUPPORT	1,500
PEAR809 SWALDER PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	5,000
PETER BRITT GARDENS MUSIC AND ARTS FESTIVAL ASSOCIATION216 WEST MAIN STREET MEDFORD,OR 97501	NONE	PUBLIC	GENERAL SUPPORT	3,000
PORTLAND INSTITUTE CONTEMPORARY ART224 NW 13TH AVENUE 305 PORTLAND,OR 97209	NONE	PUBLIC	GENERAL SUPPORT	3,000
PACIFIC NORTHWEST COLLEGE OF ART1241 NW JOHNSON ST PORTLAND,OR 97209	NONE	PUBLIC	GENERAL SUPPORT	6,500
PORTLAND BAROQUE ORCHESTRA 1020 SW TAYLOR ST SUITE 200 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	7,500
PORTLAND CENTER STAGE128 NW ELEVENTH AVE PORTLAND,OR 97209	NONE	PUBLIC	GENERAL SUPPORT	20,000
PORTLAND COMMUNITY COLLEGE FNDNPO BOX 19000 PORTLAND,OR 97280	NONE	PUBLIC	GENERAL SUPPORT	8,500
PORTLAND FESTIVAL SYMPHONY PO BOX 585 PORTLAND,OR 97207	NONE	PUBLIC	GENERAL SUPPORT	1,000
PORTLAND IMPACT INCPO BOX 33530 PORTLAND,OR 97292	NONE	PUBLIC	GENERAL SUPPORT	4,500
PORTLAND OPERA ASSOCIATION 211 E CARUTHERS ST PORTLAND,OR 97214	NONE	PUBLIC	GENERAL SUPPORT	17,500
PORTLAND STATE UNIVERSITYPO BOX 751 PORTLAND,OR 97207	NONE	PUBLIC	GENERAL SUPPORT	40,000
PORTLAND YOUTH BUILDERS4816 SE 92ND AVE PORTLAND,OR 97266	NONE	PUBLIC	GENERAL SUPPORT	3,000
PORTLAND YOUTH PHILHARMONIC421 SW 6TH AVENUE SUITE 1350 PORTLAND,OR 97204	NONE	PUBLIC	GENERAL SUPPORT	4,000
PORTLAND RESCUE MISSIONPO BOX 3713 PORTLAND,OR 97208	NONE	PUBLIC	GENERAL SUPPORT	3,500
PROFILE THEATRE PROJECTPO BOX 14845 PORTLAND,OR 97293	NONE	PUBLIC	GENERAL SUPPORT	4,500
PORTLAND WOMEN'S CRISIS LINE PO BOX 42610 PORTLAND,OR 97242	NONE	PUBLIC	GENERAL SUPPORT	2,500
PACIFIC YOUTH CHOIR3716 SW MT ADAMS DRIVE PORTLAND,OR 97239	NONE	PUBLIC	GENERAL SUPPORT	7,000
ST ANDREW LEGAL CLINIC807 NE ALBERTA STREET PORTLAND,OR 97211	NONE	PUBLIC	GENERAL SUPPORT	7,500
SATURDAY ACADEMY830 SW 10TH AVE SUITE 200 PORTLAND,OR 97205	NONE	PUBLIC	GERERAL SUPPORT	6,500
SCHOOLHOUSE SUPPLIES INC 2735 NE 82ND AVENUE PORTLAND,OR 97220	NONE	PUBLIC	GENERAL SUPPORT	5,000
SELF ENHANCEMENT INC3920 N KERBY AVENUE PORTLAND,OR 97227	NONE	PUBLIC	GENERAL SUPPORT	10,000
SHADOW PROJECT663 SW BEAVERTON HILLSDALE HWY 108 PORTLAND,OR 97225	NONE	PUBLIC	GENERAL SUPPORT	2,500
SISTERS OF THE ROAD CAFE INC 133 NW 6TH AVENUE PORTLAND,OR 97209	NONE	PUBLIC	GENERAL SUPPORT	15,000
STAND FOR CHILDREN515 SE MORRISON STREET SUITE 420 PORTLAND,OR 97214	NONE	PUBLIC	GENERAL SUPPORT	2,500
ST MARY'S ACADEMY1615 SW 5TH AVE PORTLAND,OR 97201	NONE	PUBLIC	GENERAL SUPPORT	7,500
STORE TO DOORPO BOX 4665 PORTLAND,OR 97208	NONE	PUBLIC	GENERAL SUPPORT	1,500
STREET ROOTS211 NW DAVIS PORTLAND,OR 97209	NONE	PUBLIC	GENERAL SUPPORT	1,500
THE CHILDREN'S COURSE19825 RIVER ROAD GLADSTONE,OR 97027	NONE	PUBLIC	GENERAL SUPPORT	1,500
TEARS OF JOY THEATRE323 NE WYGANT STREET SUITE 201 PORTLAND,OR 97211	NONE	PUBLIC	GENERAL SUPPORT	1,500

Form 990PF Part XV Line 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				
TRILLIUM FAMILY SERVICES INC 3415 SE POWELL BLVD PORTLAND,OR 97202	NONE	PUBLIC	GENERAL SUPPORT	6,000
THE HIGH DESERT MUSEUM59800 S HIGHWAY 97 BEND,OR 97702	NONE	PUBLIC	GENERAL SUPPORT	3,000
THE CAMPAIGN FOR EQUAL JUSTICE921 SW WASHINGTON ST SUITE 520 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	27,500
THE DOUGY CENTER INCPO BOX 86852 PORTLAND,OR 97286	NONE	PUBLIC	GENERAL SUPPPORT	2,500
THE FRESHWATER TRUST65 SW YAMHILL STREET SUITE 200 PORTLAND,OR 97204	NONE	PUBLIC	GENERAL SUPPORT	2,500
THE LIBRARY FOUNDATION INC 620 SW FIFTH AVENUE SUITE 1025 PORTLAND,OR 97204	NONE	PUBLIC	GENERAL SUPPORT	25,000
THE PANGAEA PROJECT2736 NE MARTIN LUTHER KING JR BLVD PORTLAND,OR 97212	NONE	PUBLIC	GENERAL SUPPORT	5,000
THE SALVATION ARMY PORTLAND METRO211 NE 18TH AVE PORTLAND,OR 97232	NONE	PUBLIC	GENERAL SUPPORT	2,500
TUCKER-MAXON ORAL SCHOOL 2860 SE HOLGATE PORTLAND,OR 97202	NONE	SCHOOL	GENERAL SUPPORT	75,000
VIRGINIA GARCIA MEMORIAL FOUNDATIONPO BOX 486 CORNELIUS,OR 97113	NONE	PUBLIC	GENERAL SUPPORT	2,500
VOLUNTEERS OF AMERICA OF OREGON INC3910 SE STARK ST PORTLAND,OR 97214	NONE	PUBLIC	GENERAL SUPPORT	6,500
WHITE BIRD5620 SW EDGEMONT PLACE PORTLAND,OR 97239	NONE	PUBLIC	GENERAL SUPPORT	2,500
WILLAMETTE RIVERKEEPER1515 SE WATER AVE 102 PORTLAND,OR 97214	NONE	PUBLIC	GENERAL SUPPORT	3,500
WILLAMETTE UNIVERSITY900 STATE STREET SALEM,OR 97301	NONE	PUBLIC	GENERAL SUPPORT	40,000
WORLD FORESTRY CENTER4033 SW CANYON RD PORTLAND,OR 97221	NONE	PUBLIC	GENERAL SUPPORT	6,000
YOUNG MEN'S CHRISTIAN ASSOCIATION OF THE COLUMBIA WILLAMETTE 9500 SW BARBUR BLVD SUITE 200 PORTLAND,OR 97219	NONE	PUBLIC	GENERAL SUPPORT	2,500
YOUNG AUDIENCES OF OREGON INC1220 SW MORRISON SUITE 900 PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	12,000
YWCA OF GREATER PORTLAND 1111 SW 10TH AVE PORTLAND,OR 97205	NONE	PUBLIC	GENERAL SUPPORT	3,500
Total  3a				1,060,900

TY 2011 Accounting Fees Schedule**Name:** ROSE E TUCKER DECD CHARITABLE 97309080**EIN:** 93-6119091

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE	2,000			2,000

**TY 2011 Investments Corporate
Bonds Schedule**

Name: ROSE E TUCKER DECD CHARITABLE 97309080
EIN: 93-6119091

Name of Bond	End of Year Book Value	End of Year Fair Market Value
NUVEEN INTERMEDIATE TERM BD FD	5,753,649	5,951,855

**TY 2011 Investments Corporate
Stock Schedule****Name:** ROSE E TUCKER DECD CHARITABLE 97309080**EIN:** 93-6119091

Name of Stock	End of Year Book Value	End of Year Fair Market Value
US BANCORP	29,946	948,463
EATON VANCE LARGE CAP VALUE	2,578,200	2,408,224
NUVEEN MID CAP GRWTH OPP FD	958,688	1,460,072
NUVEEN SMALL CAP SELECT	928,765	903,723
RUSSELL EMERGING MKT FD	500,000	358,826
PRICE T ROWE GROWTH STK FD	2,550,946	2,724,637
AMERICAN EUROPACIFIC GRTH F2	1,100,000	1,136,851
LAUDUS INTL MARKETMASTERS FD	1,422,075	1,474,154
PIMCO TOTAL RETURN FUND	1,902,982	1,876,576

TY 2011 Legal Fees Schedule

Name: ROSE E TUCKER DECD CHARITABLE 97309080

EIN: 93-6119091

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
NON-ALLOCABLE LEGAL FEES	24,930			24,930

TY 2011 Other Expenses Schedule

Name: ROSE E TUCKER DECD CHARITABLE 97309080

EIN: 93-6119091

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE FILING FEE	1,135	0		1,135
GRANTMAKERS	2,438	0		2,438
COUNCIL ON FOUNDATIONS	2,330	0		2,330

TY 2011 Other Increases Schedule

Name: ROSE E TUCKER DECD CHARITABLE 97309080

EIN: 93-6119091

Description	Amount
RETURNED SCHOLARSHIPS PRIOR YEAR	5,000

TY 2011 Taxes Schedule**Name:** ROSE E TUCKER DECD CHARITABLE 97309080**EIN:** 93-6119091

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAX PAYMENT - PRIOR YE	51	0		0
FEDERAL ESTIMATES - PRINCIPAL	8,670	0		0
FOREIGN TAXES ON QUALIFIED FOR	7,167	7,167		0
FOREIGN TAXES ON NONQUALIFIED	333	333		0